PeopleUpdate Admin Guide

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PeopleUpdate Overview

The overview contains brief information about PeopleUpdate and Web Active Directory. To get started installing and using PeopleUpdate in your organization, go to the Quick Start Guide.

About PeopleUpdate

Web Active Directory's PeopleUpdate™ product empowers you to take control of the information in your Microsoft® Active Directory®. With a clean, intuitive user interface, PeopleUpdate enables users to find information about other users, computers, printers, groups or just about anything else in your organization, as long as the data come from Active Directory. PeopleUpdate also adds editing features that allow authorized users to manage Active Directory data, taking the maintenance activities saddling your IT organization and distributing them to users who can more effectively manage that data.

The v3.4 release adds editing features in PeopleUpdate and allows administrators to use secondary search pages with highly customized layout templates to edit Active Directory attributes that are stored by distinguished name, including Manager, Assistant and Group Members. See the release notes for more detailed information about enhancements made in this release.

Features and Benefits

- Search, export, update and delete Active Directory data from a user-friendly web interface.
- Target user views using tabs for functional departments, office locations or different management levels in your organization
- Support multilingual offices within your organization with localization capabilities
- Report and mine audit data from your Active Directory to satisfy auditing requirements
- Navigate your organization using a visual org chart using the manager/employee relationships as stored in your Active Directory
- Manage accounts with the ability to reset passwords, enable/disable accounts, and unlock user accounts
- Delegate editing control and tab visibility to end users or groups using access control lists
- Display employee photos stored on your network and linked to your organizational users' Active Directory attribute values
- Administer PeopleUpdate with a clean, simple web-based interface
- Control the formatting of updated data to ensure consistency
- Use powerful LDAP search filters to control exactly what data displays and filter out disabled accounts, display groups, computers, etc.
- Search, export, and update an entire Active Directory Forest from one web interface as PeopleUpdate supports multiple domains within the same forest through its support of Global Catalog searching
- Audit end user updates and changes to Active Directory objects using the Application event log to allow consolidation into an enterprise monitoring system.
- Export data from Active Directory to Microsoft Excel®

About Web Active Directory LLC

Web Active Directory LLC, a provider of web-based Active Directory management tools, develops its products on the Microsoft .NET technology platform. Web Active Directory's products leverage the powerful .NET framework to deliver consistent, reliable and scalable web applications to your enterprise.

PeopleUpdate Quick Start Guide

You can install PeopleUpdate and get it running very quickly, in many cases in less than 20 minutes. This guide helps you walk through the pre-installation, installation, post-installation and configuration steps to easily set up PeopleUpdate and have it operating in your environment. Before you begin using PeopleUpdate to search and update your Active Directory, you should complete the steps in this guide to properly install and configure PeopleUpdate. Contact Web Active Directory support if you need assistance with any of the steps.

Verifying Prerequisites

PeopleUpdate requires that your installation server and web browser clients meet a few important requirements to successfully run the application. These requirements include certifying the web server's operating system version, web server version and ASP.NET version. Refer to the Verify Prerequisites topic for more information about exactly what requirements your system must meet to install and run PeopleUpdate.

Installing PeopleUpdate

Once you ensure your system meets the PeopleUpdate requirements, you can install the PeopleUpdate software on the web server that will run PeopleUpdate. Refer to the Installation topic for more information about how to install PeopleUpdate on a web server.

Configuring PeopleUpdate after Installation

After your installation completes, you need to configure a few settings on your web server to properly run PeopleUpdate, including checking the PeopleUpdate application's IIS configuration to ensure PeopleUpdate is only using Windows Integrated authentication and not Anonymous authentication. PeopleUpdate will not work correctly with Anonymous authentication because the logged-in user's account token will not pass through to the IIS server and will not be available for PeopleUpdate to use to identify the user. Refer to the Post Installation topic for more information about how to configure PeopleUpdate after you install the software.

You should also ensure you set up a service account for PeopleUpdate and then designate that service account as the PeopleUpdate proxy account. This procedure is normally completed in the Verify Prerequisites section. After you complete this step you can then update Active Directory using PeopleUpdate. PeopleUpdate allows you to set a different proxy account (or no proxy account) for each tab in the configuration. Web Active Directory recommends that you set a proxy account (usually the same service account) for each tab, even if the tab is not configured to allow editing. Create a PeopleUpdate service account in an appropriate container in your domain and then follow the procedure to delegate control to the service account.

To set up a domain service account as the PeopleUpdate proxy account:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console and reference the Directory topic for more detailed information about setting up a proxy account.
2. Click Directory in the left navigation bar in the Tab Configuration section.
3. Enter the name of your service account in the Account Name field: Use the form of YOURDOMAIN\PeopleUpdateServiceAcct.
4. Set the password for the service account in the Password field.
5. Select Yes for Proxy Account Enabled to instruct the PeopleUpdate tab to use the proxy account to bind to your Active Directory when performing search and update operations.
6. Click Save Changes to save your configuration settings.
7. Click the Test LDAP Connection button to ensure the proxy account you specified has sufficient credentials to bind to your Active Directory. If this test fails, ensure you put in the correct

domain and user name, password and that you selected Yes for the Proxy Account Enabled field. You also should check to ensure the LDAP Bind Path you have specified is valid and the proxy account has at least Read privileges on the bind object.

Searching and Updating your Active Directory

Once you complete setting up your PeopleUpdate proxy account, you are ready to search and update your Active Directory using PeopleUpdate. You can open the Search Console from the Web Active Directory PeopleUpdate menu item in the web server's Programs menu. You and your users can also access PeopleUpdate by entering http://<MyWebServerName>/PeopleUpdate/ into a web browser.

> **Note**: Your web server configuration may differ from a normal installation depending on the virtual directory name you selected or if you have moved files to another application, etc. Please contact Web Active Directory support if you would like assistance diagnosing an issue with connecting to the PeopleUpdate Search Console.

After you try out the default PeopleUpdate configuration using the Search Console, refer to the individual topics related to the types of administrative operations you need to perform to customize your PeopleUpdate application for your environment. You might first want to restrict who can access the PeopleUpdate Administration Console and you should refer to the Administration Console topic for more information about securing your Administration Console.

Typically, you will want to configure the branding of PeopleUpdate to match your company and you can set up a new logo and application titles using the Branding page. You will also usually set up Windows groups from your domain and then create access control lists to control tab viewing and editing access using the Security page. You can change your page layouts and what attributes display on each page using the Task Nav page. Use the Attributes page to configure which attributes are available in each tab and to create drop-down lists and input masks that restrict the searchable and editable data values that display in the Search Console.

Refer to the Administration Console topic for detailed information about what each Administration Console page allows you to configure in PeopleUpdate.

System Requirements & Support

System Requirements

You should ensure your environment meets the following requirements before installing PeopleUpdate.

Server Requirements

Ensure the server on which you will install PeopleUpdate meets the following requirements before installing the application.

Server Hardware	500 MHZ Pentium III and higher, 128MB RAM, 50MB free disk space
Server Operating System	Windows Server 2003 or later
Web Server	Internet Information Services 6.0 or later (Windows Server 2003 ships with IIS 6.0)
ASP.NET	.NET 2.0 only; you can download and install the *free* Microsoft .NET framework from http://msdn.microsoft.com/netframework/downloads/howtoget.asp.
Active Directory	Windows 2000 schema or later

Domain Requirements

The forests and domains you intend to search and update must meet a couple of requirements to run PeopleUpdate.

Active Directory	Microsoft Active Directory 2000 or later (mixed or native mode)
Active Directory Permissions	Read and write permissions on the Active Directory attributes you intend to expose as searchable and editable in the PeopleUpdate application. PeopleUpdate uses a proxy account to search and update information in Active Directory on behalf of application users and you need to designate a service account that has modify permissions to search and update the attributes you configure PeopleUpdate to edit.

Client Requirements

Client browsers that connect to PeopleUpdate, including the Search Console for end-users and Administration Console for administrators, must meet two requirements or PeopleUpdate will not work correctly.

Client-side scripting	Client-side scripting must be enabled. Scripting typically is enabled by default in the browser but your organization may have overridden the default script settings using domain group policy or individual users might have overridden their script settings.
Cookies	Cookies should be enabled. This is not a critical requirement as it only affects one minor feature of the application and if a browser does not allow cookies the state of the org chart (whether it shows or hides) will not be saved at an individual end-user level.

Checking if Client-Side Scripting is Enabled for a Browser

These procedures illustrate how to check for client-side scripting for Microsoft Internet Explorer browsers. Please refer to your browser's documentation for information about enabling client-side scripting if you are using a non-Internet Explorer browser.

Checking for client-side scripting with Internet Explorer 7.x:

1. Select Internet Options from the Tools menu.
2. Click the Security tab.
3. Select Internet from the list of security zones at the top of the Security options dialog box.
4. Click Custom Level.
5. Scroll to the Active Scripting item under the Scripting section.
6. Select Enable.
7. Click Ok to exit the Security Settings dialog box.
8. Click Ok to save your changes from the Internet Options dialog box.

Checking for client-side scripting with Internet Explorer 6.x:

1. Select Internet Options from the Tools menu.
2. Click the Security tab.
3. Select Internet from the list of security zones at the top of the Security options dialog box.
4. Click Custom Level.
5. Click Settings.
6. Scroll to the Active Scripting item.
7. Select Enable.
8. Click Ok to exit the Security Settings dialog box.
9. Click Ok to save your changes from the Internet Options dialog box.

Checking for client-side scripting with Internet Explorer 5.x:

1. Select Internet Options from the Tools menu.
2. Click the Security tab.
3. Select Internet from the list of security zones at the top of the Security options dialog box.
4. Click Custom.
5. Click Settings.
6. Scroll to the Active Scripting item.
7. Select Enable.
8. Click Ok to exit the Security Settings dialog box.
9. Click Ok to save your changes from the Internet Options dialog box.

Checking for client-side scripting with Internet Explorer 4.x:

1. Select Internet Options from the View menu.
2. Click the Security tab.
3. Select Internet from the list of security zones at the top of the Security options dialog box.
4. Click Custom.
5. Click Settings.
6. Scroll to the Active Scripting item.
7. Select Enable.
8. Click Ok to save your changes.

Support

For your support needs, you can check our support knowledge base or open a support ticket via email or telephone.

Accessing the Web Active Directory Knowledge Base

You can access our knowledge base at http://support.webactivedirectory.com.

Opening a Support Ticket

The support mailbox and telephone is monitored from 7:00 AM to 6:00 PM Mountain Time USA (GMT - 6) from Monday through Friday. We try to respond to all support inquiries within four hours on Monday through Friday during these core support hours. You can make arrangements for support outside of these core hours by contacting Web Active Directory support at support@webactivedirectory.com.

To open a support ticket via email:

1. Create an email message to support@webactivedirectory.com.
2. Include the following information about your case in the email.
    - Operating system and service pack level of the server where PeopleUpdate is installed
    - Whether the server where PeopleUpdate is installed is a domain controller (we highly recommend you *do not* install the product on a domain controller but we will support this configuration if it is your only option)
    - LDAP Base Path variable from the Directory page of the Administration Console
    - Error message or behavior your are experiencing
    - Application event log from the server where PeopleUpdate is installed
    - WADError.log file from the server where PeopleUpdate is installed, typically C:\Program Files\WebActiveDirectory
3. Send the email with the requested information and you should receive a confirmation message soon with further information that a ticket has been created.

To open a support ticket via telephone:

1. Call Web Active Directory Support at +1 800.747.3565.
2. Prepare the following information about your case to relay to support personnel or leave in your voice mail message.
    - Operating system and service pack level of the server where PeopleUpdate is installed
    - Whether the server where PeopleUpdate is installed is a domain controller (we highly recommend you *do not* install the product on a domain controller but we will support this configuration if it is your only option)
    - LDAP Base Path variable from the Directory page of the Administration Console
    - Error message or behavior your are experiencing
    - Application event log from the server where PeopleUpdate is installed
    - WADError.log file from the server where PeopleUpdate is installed, typically C:\Program Files\WebActiveDirectory

Knowledge Base

You can access a comprehensive knowledge base addressing common issues and configuration questions at http://www.webactivedirectory.com/.

Information

If you would like more information about Web Active Directory LLC, please contact us at info@webactivedirectory.com.

Sales

For sales or purchasing questions, please email the Web Active Directory sales team at sales@webactivedirectory.com.

Licensing and Maintenance

The licensing and maintenance notes here provide high-level information about Web Active Directory's licensing and maintenance agreements for PeopleUpdate . Please contact your Web Active Directory account executive for information about your particular licensing scheme and maintenance agreement.

How is PeopleUpdate licensed?

PeopleUpdate is typically licensed on a per user basis. The user count is based upon the number of employees in your company with an LDAP account, including user accounts and contacts. In most Microsoft Active Directory environments, each employee has a user account stored in Active Directory.

Web Active Directory LLC recognizes that each organization is different and many have unique environments that do not fit the standard organization. Please contact your Web Active Directory account executive to discuss licensing options if you do not feel you fit the standard model for licensing.

If you have questions regarding your licensing or use of PeopleUpdate, please contact Web Active Directory LLC.

Am I eligible to receive support and product updates?

Web Active Directory LLC provides email and telephone support in addition to product updates to organizations that possess current maintenance contracts. While under a current maintenance contract, upgrades are free. Support is provided via email and telephone as well as through an online support knowledge base.

You can access the support knowledge base at http://support.webactivedirectory.com/ and it is free and available for all customers, including those with no maintenance contract in place. Please contact your sales representative if you have a questions about your maintenance contract.

Installation

Verify Prerequisites

Ensure the server on which you will install PeopleUpdate meets the following requirements before installing the application. You can check the full list of system requirements at System Requirements.

Server Hardware	500 MHZ Pentium III and higher, 128MB RAM, 50MB free disk space
Server Operating System	Windows Server 2003 or later
Web Server	Internet Information Services 6.0 or later (Windows Server 2003 ships with IIS 6.0)
ASP.NET	.NET 2.0 only; you can download and install the *free* Microsoft .NET framework from http://msdn.microsoft.com/netframework/downloads/howtoget.asp.
Active Directory	Windows 2000 schema or later

Checking Product Versions

You may need to check the version of certain products you are using to verify they meet the PeopleUpdate requirements.

Internet Information Services

Each operating system Microsoft produces maps to a version of IIS and you have IIS 6.0 if you are running Windows 2003.

Windows Server 2003	IIS 6.0
Windows XP	IIS 5.1
Windows 2000	IIS 5.0
Windows NT 4.0 or Windows 9x	Look for Windows NT 4.0 Option Pack in Add/Remove Programs (Control Panel). If it is there, you are running IIS 4.0 (NT Server) or PWS 4.0 (NT Workstation or Win9x).

ASP.NET

Go to the Microsoft Knowledge Base article at http://msdn2.microsoft.com/en-us/netframework/aa569264.aspx to check if you have version 2.0 of the .NET framework installed on your web server. If you do not have it installed, the article contains instructions about how to download and install version 2.0.

Creating a Service Account to Run PeopleUpdate

Most environments allow a default PeopleUpdate installation, with no custom configuration for your environment, to search and display most attributes in Active Directory. Editing and updating Active Directory attributes, however, requires elevated privileges and most environments will **not** allow a default PeopleUpdate installation to update the directory. By default, PeopleUpdate uses anonymous binding to talk to Active Directory and therefore only has very limited privileges that are typically set to only allow searching for a small subset of Active Directory attributes.

Web Active Directory recommends that you create a service account in your domain dedicated to running PeopleUpdate. PeopleUpdate uses the service account to bind to your Active Directory to perform search and update operations instead of passing the PeopleUpdate user's credentials to Active Directory for binding. Web Active Directory has chosen to implement the service account model instead of passing user credentials to simplify the Active Directory configuration required to run PeopleUpdate. You only need to configure Active Directory permissions that delegate read and write permissions to the PeopleUpdate service account.

Delegating Active Directory Permissions to the PeopleUpdate Service Account

PeopleUpdate requires that your service account have write permissions on the attributes you intend to update. Once you create the PeopleUpdate service account in your domain, use the procedure below to grant the necessary permissions to run PeopleUpdate.

To grant Microsoft Active Directory permissions to your PeopleUpdate service account:

1. Open Active Directory Users and Computers from the Start > All Programs > Administrative Tools menu.
2. At the root of the directory tree for the domain, right-click the root of your domain (or another OU you want to allow PeopleUpdate to manage) and choose Properties.
3. Click Delegate Control to open the Delegation of Control Wizard.
4. Click Next to proceed past the wizard's welcome page.
5. Click Add and find the PeopleUpdate service account you created previously.
6. Click Next to proceed.
7. Click Create a custom task to delegate and click Next to proceed.
8. On the Active Directory Object Type page, ensure you are delegating control to This folder, existing objects in this folder, and creation of new objects in this folder. This option allows the PeopleUpdate service account to manage the entire domain.
9. Click Next to proceed.
10. Check Read All Properties and Write All Properties to allow the PeopleUpdate service account to read and write all properties in the folder.
11. Click Next to proceed.
12. Click Finish to save your changes and close the wizard.

Installation

Before you install PeopleUpdate, ensure you verify that the installation server meets the prerequisites to properly install PeopleUpdate. Once you have satisfied these requirements, you can install PeopleUpdate with confidence.

To install PeopleUpdate on your web server:

1. Log in to your web server.
2. Locate the installation package you downloaded from Web Active Directory's download site and open it.
3. Refer to the InstallationReadMe.rtf document in the package for detailed instructions on installing PeopleUpdate, including upgrading from previous versions of PeopleUpdate.

PeopleUpdate Resource Files

PeopleUpdate installs several files on your web server's file system to enable the application to run correctly. By default, these files install themselves at C:\Program Files\WebActiveDirectory\ and the installer grants the proper permissions to the ASP.NET account. You can change the resource file location during the installation process, though, and you must ensure that the ASP.NET account, typically the IIS_WPG group on Windows Server 2003, has Modify permissions on the directory in which the PeopleUpdate resource files reside. Ensure you lock permissions down for other users, though, so unauthorized users cannot access and modify these resource files.

WADPUConfiguration.xml	Stores the configuration data for your custom PeopleUpdate configuration as XML
WADError.log	Logs error information for errors and other issues that occur in PeopleUpdate and support personnel can use this file to help troubleshoot application problems; this error information is also entered into the Application event log
WADTrace.log	Contains application tracing information when tracing is enabled
LdapMapping.xml	Maps friendly LDAP attribute names to their true directory names in Active Directory
WadLocalizationTemplate.xml	Provides a template for you to use to localize your PeopleUpdate application tabs

Reinstalling the Default PeopleUpdate Configuration File

You can reinstall the default configuration file that ships with the product if you need. Typically, you will not install the default configuration file when reinstalling or upgrading PeopleUpdate unless instructed to do so by Web Active Directory support personnel or by an installation help document.

To reinstall the default configuration file:

1. Run the PeopleUpdate installation package that you downloaded from the Web Active Directory download site.
2. Follow the installation instructions in the InstallationReadMe.rtf document in the package indicating how to install the default configuration file.

Post Installation

The PeopleUpdate post-installation procedure configures the PeopleUpdate web application to properly pass user credentials to it so it can control editing and viewability properly.

Setting Integrated Windows Authentication for PeopleUpdate

After you install PeopleUpdate, you probably need to change the type of IIS authentication used for the PeopleUpdate IIS application. PeopleUpdate requires Integrated Windows authentication so it can read the current user's information and correctly implement editing and tab viewing security for the application. Anonymous authentication does not pass through the current user's credentials and causes PeopleUpdate to function improperly by always examining the anonymous user's credentials instead of the current user's credentials.

To configure Integrated Windows authentication:

1. Open Internet Services Manager from the Start > All Programs > Administrative Tools > Internet Information Services (IIS) Manager menu.
2. Expand the node displaying your server name.
3. Expand the Web Sites node.
4. Expand the Default Web Site.
5. Right click on the PeopleUpdate application and select Properties.
6. Change to the Directory Security tab and click Edit in the Authentication and access control section.
7. Ensure that Enable anonymous access is **not** checked and that Integrated Windows authentication is the only type of authentication checked. Note that PeopleUpdate will not work properly using anonymous authentication so it is very important to turn it off.
8. Click OK or Apply to save the changes and close all the dialog boxes.

Uninstall

You can uninstall PeopleUpdate for application upgrades, to repair it or to completely remove it from your system. The uninstallation process leaves your configuration settings and files for partial uninstallations related to upgrades and repairs while the full uninstallation completely removes all PeopleUpdate files and settings.

To remove PeopleUpdate for an upgrade or repair:

1. Open the Add/Remove Programs applet from the Start > Control Panel > Add or Remove Programs menu.
2. Find the WAD PeopleUpdate program in the list of installed products.
3. Select Remove and confirm the uninstallation by clicking Yes.
4. When prompted to remove the PeopleUpdate registry entries in the local registry, select No to leave PeopleUpdate settings on the system. When you run the repair or upgrade installation, the process will detect your settings and leave them so your repair or upgrade will use your current settings.

To completely remove PeopleUpdate:

1. Open the Add/Remove Programs applet from the Start > Control Panel > Add or Remove Programs menu.
2. Find the WAD PeopleUpdate program in the list of installed products.
3. Select Remove and confirm the uninstallation by clicking Yes.
4. When prompted to remove the PeopleUpdate registry entries in the local registry, select Yes to permanently remove all PeopleUpdate files and settings from the system.

Configuration & Administration

Administration Console

The PeopleUpdate Administration Console provides a web-based user interface to manage virtually every aspect of your PeopleUpdate application in one centralized place. PeopleUpdate allows you to secure the Administration Console for selected users and groups in your domain and authorized users can then access the console using a web browser. Refer to the Securing the Administration Console topic for more information about controlling access to the PeopleUpdate Administration Console.

Logging Into the Administration Console

You can access the PeopleUpdate Administration Console to manage your PeopleUpdate configuration. The console employs Windows authentication that does not require you to explicitly log in as long as your user account is in a domain trusted by the web server where PeopleUpdate is installed and your browser is configured to pass your Windows credentials to PeopleUpdate, which is the case in most default installations.

To log in to the Administration Console:

1. Open a web browser.
2. Navigate to http://<YourServerName>/<YourVirtualDirectory>/AdminPage.aspx, where <YourServerName> is the name of the web server on which you installed PeopleUpdateand <YourVirtualDirectory> is the virtual directory into which you installed PeopleUpdate.
3. View the Administration Console home page and navigate to the administration pages you need to configure your PeopleUpdate installation.

Securing the Administration Console

You can secure the PeopleUpdate Administration Console to restrict access to a set of authorized users in your environment. PeopleUpdate leverages ASP.NET security to check user credentials and authorize access to the Administration Console and this security works by using Windows authentication to examine the current user accessing PeopleUpdate.

By default, PeopleUpdate ships with an Administration Console security configuration that allows everyone to access it. You can set Windows groups or individual users to access PeopleUpdate and Web Active Directory recommends that you only use groups as a best practice to control access to the Administration Console.

To restrict access to the Administration Console:

1. Navigate to the PeopleUpdate installation directory on the web server where you installed PeopleUpdate. This directory is by default located at C:\inetpub\wwwroot\PeopleUpdate but may be in a different location depending on your environment. You can look up the location using Internet Services Manager and examining the PeopleUpdate application's home directory.
2. Open the Web.config file--located in the PeopleUpdate installation directory's root--with a text editor like Notepad.
3. Find the two <location /> elements near the end of the Web.config file, one with a path="AdminPage.aspx" attribute and the other with a path="UserControls/Admin" attribute. These location elements and their child nodes control access to the Administration Console by restricting access to the page and directory that contain the Administration Console files. The excerpt below shows the configuration for the <location /> elements and includes the %domain% and %group% placeholders you can use to restrict access to the Administration Console.

```
<location path="AdminPage.aspx">
  <system.web>
```

```
      <authorization>
        <allow roles="%domain%\%group%" />
        <deny users="*" />
      </authorization>
    </system.web>
  </location>
  <location path="UserControls/Admin">
    <system.web>
      <authorization>
        <allow roles="%domain%\%group%" />
        <deny users="*" />
      </authorization>
    </system.web>
  </location>
```

4. Modify the <allow /> and <deny /> elements to allow access to the select group or groups of Windows users who need access to the Administration Console while denying access to everyone else. Add roles and users attributes to the elements to determine which groups (roles) and users are allowed and denied access. Ensure you include the domain name followed by the group or user name in the appropriate roles or users attribute values and separate multiple roles or users using commas. You may also employ the asterisk character (*) as a wildcard meaning all users or roles (depending on the attribute) and the question mark character (?) to mean anonymous access.

   The following examples help you understand how to implement this security.

Allow access to IT and HR groups and deny access to everyone else

```
<allow roles="MYDOMAIN\IT, MYDOMAIN\HR" />
<deny users="*" />
```

Allow access to IT group and HR user and deny access to everyone else

```
<allow roles="MYDOMAIN\IT" users="MYDOMAIN\HR User" />
<deny users="*" />
```

Allow access to IT group and deny HR user explicitly

```
<allow roles="MYDOMAIN\IT" />
<deny users="MYDOMAIN\HR User" />
```

5. Save your changes and test the Administration Console with user accounts in different groups to ensure you have properly configured the security to allow and deny access.

Administration Console Pages

The Administration Console contains pages that allow you to quickly and easily configure your PeopleUpdateapplication for your environment. PeopleUpdateadministration comprises two primary configuration scopes: global configuration and tab-specific configuration. The global configuration applies to elements that impact application behavior the same way across all tabs. Tab-specific configuration elements only impact the tab under which they are configured. This flexibility allows you to create a robust application configuration that satisfies myriad business scenarios.

Admin Home Page

This page acts as the home and default page for the Administration Console and contains a brief overview of each of the Administration Console's pages and what they allow you to configure in PeopleUpdate. The Admin Home page loads by default when you initially log in to the Administration Console.

Global Configuration Pages

The Global Configuration section includes two configuration pages: Branding and Security. The Branding page allows you to customize your PeopleUpdateinterface to include your corporate logo and colors as well as to personalize the title of the PeopleUpdateapplication. Use the Security page to set up access control lists that can include Windows groups from your environment and you can then use these access control lists to determine which tabs users can view and which attributes users can edit.

The configuration pages in the Global Configuration section control settings for your entire PeopleUpdateapplication across all tabs and you cannot apply these settings to specific tabs since the configuration affects all tabs the same way.

Branding	Customize the PeopleUpdateuser interface site title, localization file, banner and style sheet
Security	Manage groups and access control lists that control which tabs your users can view and which attributes they can edit

Tab Configuration Pages

PeopleUpdate uses tabs to allow you to easily search and manage your Active Directory by dividing it into more manageable configurations. Each tab can be configured to work with different parts of your Active Directory and you can also control which users see which tabs to further secure information for viewing and editing. Each tab can bind to a different part of the directory and have its own set of attributes and pages. You can even subdivide tabs into task items that can show different information available on each tab!

The Tab Configuration section includes four configuration pages: Tabs, Directory, Attributes and Task Items. The Tabs page allows you to manage the tabs that appear in your PeopleUpdateinterface. The Directory page helps you configure Active Directory connection and binding information. Use the Attributes page to set up which LDAP attributes, also known as fields, are available to pages in the tab as well as how the attributes display and who can edit them. Finally, the Task Items page allows you to configure and lay out individual task items and pages for the tab.

As you use the pages in the Tab Configuration section of the Administration Console you will notice a "matrix" navigation feature that make it easier for you to navigate among all the different configurations you can create with tabs and task items. When you are on a selected tab, you will always view each Directory, Attributes or Task Items configuration within the scope of the selected tab. As you view the configuration page and change settings, note the tab you are editing is highlighted at the top of the page. To edit a different tab, just click on the tab you want to edit and you will switch to that tab’s configuration settings. In a similar manner, as you switch among Directory, Attributes and Task Items configuration pages you will notice that the highlighted tab stays the same among the pages. This allows you to quickly set up the directory, attributes and task nav configurations for a particular tab.

The same type of behavior characterizes how pages behave as you switch tabs. The selected configuration page remains highlighted as you switch among tabs and displays the tab's configuration for that page. This allows you to easily change configurations for multiple tabs.

The configuration pages in the Tab Configuration section control settings for your each PeopleUpdatetab and settings on one tab do not affect the behavior of other tabs.

Tabs	Create or delete tabs, set up localization for a tab and set the access control list that determines who can see each tab
Directory	Set directory bind information and proxy account credentials for searching and updating your Active Directory, add default search filters and set directory search parameters
Attributes	Configure which attributes are available for Task Items pages, set access control lists that determine who can edit which attributes and set display options for attributes
Task Items	Manage page flows, create page display layouts and set advanced configuration options for task items

Global Configuration

Administration Console: Branding Configuration Page

Customize the PeopleUpdate user interface using the Branding page to manage the site title, localization file, banner and style sheet. The settings on the Branding page apply to your entire PeopleUpdate application across all tabs.

Accessing the Branding Configuration Page

You must have administrative access to the PeopleUpdate Administration console to modify branding settings.

To navigate to the Branding page:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Click Branding in the left navigation bar in the Global Configuration section.

Setting Site Information

You can modify the site titles that appear in the application banner and on the browser's title bar to fit your organization.

Site Title	Title text displayed on each page under your web site banner
Browser Title Bar Text	Text that displays in the browser's title bar at the top of your browser application
Localization File Path	File path to the global localization file to use for the application. This localization file acts as the default global localization file. Individual tabs can have their own localization files and tab-level localization files override the global localization file.
No Data Found Message	Text that displays on the Detailed Results page when an object cannot be found in the directory. This issue most commonly occurs when the web application security settings for the product are incorrectly configured in IIS. In this scenario, the My Info tab cannot locate the account for the authenticated user and will then display this message. In general, the message displays on the Details page when the item about which you want to display details cannot be located.
Link Options	**User Display Name**: Check this option to display a linkable user name in the welcome text in the upper-left part of the Task Nav of the Search Console. **E-Mail Addresses**: Check this option to create linkable e-mail addresses for any attributes that display an e-mail address. You can override this option at an attribute level on the Attributes management page. **URIs**: Check this option to create linkable URIs for any attributes that display URI. You can override this option at an attribute level on the Attributes management page. **URI Target**: Set the default target for linkable URIs displayed in the Search Console. You can use the default HTML options of "_blank," "_parent," "_self" or "_top." You may also enter a name for a window and all links will target the same new window.
Default Text Box Width	Default width of all edit text boxes that display. You can override this at an attribute level on the Attributes management page.

To modify site title settings:

1. Navigate to the Administration Console’s Branding page.
2. Edit the Site Title and Browser Title Bar Text fields.

3. Click Save Changes to update your PeopleUpdate branding configuration.

Localizing the Application Across All Tabs

PeopleUpdate allows you to localize your PeopleUpdate installation. You can provide a default localization file that will set the text on all Search Console pages in all tabs and these localizations override the default application text. This is a good configuration if you'd like to customize your Search Console and provides a default display for tabs that do not override the global localization file you set up on the Branding configuration page. You might want to use this feature if you are a multi-national corporation operating offices in locations that speak multiple languages. You can then expose PeopleUpdate to each office in their native language and consolidate administration to one PeopleUpdate instance instead of managing multiple application distributions.

PeopleUpdate localization works by reading an XML file that contains the localized text for the display elements in the application. You can put the XML localization file anywhere you'd like where the PeopleUpdate web server can access it and you can create multiple localization files for PeopleUpdate. Web Active Directory recommends that you store the localization files outside of the PeopleUpdate installation directory so the files are not overwritten during product upgrades. All you need to do is set the localization file path to the location where you saved the file.

If you do not set a localization file or if the file cannot be located for the configuration then the entire application will use the default language implementation of U.S. English. Individual tabs can override the global localization file to allow you extensive customization of the user interface from tab to tab.

To set a global localization file:

1. Navigate to the Administration Console's Branding page.
2. Enter the path to your localization file in the Localization File Path field. You may enter the path using any path descriptor that allows PeopleUpdate to find the file, including a local path on the web server like C:\MyLocalizationFile.xml, using a UNC path like \\MyServer\MyShare\MyLocalizationFile.xml and using HTTP like http://MyServer/MyVirtualDirectory/MyLocalizationFile.xml.
3. Click Save Changes to update your PeopleUpdate localization configuration.

Changing the banner settings

PeopleUpdate allows you to customize the banner image that displays so you can seamlessly integrate the application into your corporate software environment.

Banner Path	HTTP path to the banner to display at the top of each PeopleUpdate page. For example, if your banner image is stored at http://www.mycompanyname.com/images/YourCompanyLogo.gif, then enter the entire previous URL to the image. We recommend that you store your custom banner image outside the virtual directory installed with the application to ensure the image isn't deleted or overwritten when you upgrade to newer versions. You can also use the default banner image located at http://<YourServerName>/<YourVirtualDirectory>/Images/Branding/WadBanner.gif, where <YourServerName> is the name of the web server on which you installed the application and <YourVirtualDirectory> is the virtual directory into which you installed. Note: You can also use a relative path to reference your image using the form /<YourVirtualDirectory>/Images/YourImage.gif.
Banner Preview	Displays a preview of the banner image you specify in Banner Path when you save the configuration changes
Alternate Text	Text displayed when a user hovers his or her mouse over the banner image
Banner Width	Forces the banner image to the width you specify; if you set this option to zero (0) for width, it will display the image at its native width
Banner Height	Forces the banner image to the height you specify; if you set this option to zero (0) for height, it will display the image at its native height

To modify banner settings:

1. Navigate to the Administration Console’s Branding page.
2. Make the appropriate changes to the Banner Path**,** Alternate Text, Banner Width and Banner Height fields.
3. Click Save Changes to update your PeopleUpdate branding configuration.

Customizing the style sheet

PeopleUpdate uses Cascading Style Sheets (CSS) technology to store display formatting for the Search Console. You can copy the default style sheet from the ~/Styles directory in the PeopleUpdate application installation directory and customize the style sheet for your organization. You should copy the style sheet to a location outside the PeopleUpdate installation directory to ensure you customized style sheet will not get overwritten when you upgrade PeopleUpdate.

Style Sheet Path	HTTP path to the style sheet you want use. For example, if your style sheet is located at http://www.mycompanyname.com/styles/YourStyles.css, then enter this for the path value. Alternately, you can use the default style sheet located at http://<YourServerName>/<YourVirtualDirectory>/Styles/MainStyle.css. Note: Do not make changes to the default style sheet as these changes will be overwritten when the application is removed or upgraded. Instead, copy MainStyle.css outside of the virtual directory, make your changes, and then point the style sheet path to the new location. This will ensure the style sheet is not removed or overwritten when you upgrade to newer versions.
Display Table Cell Width	Sets the width of each column for data displayed on the Detailed Results and Edit pages in the Search Console. The width, defined in pixels, determines how wide each column of data displays. Set the width to 0 to expand the column width to the width of any data displayed in the column. You can use this value when you change the behavior of the Details button from the Summary Results page and you need to limit the width of the data.

To set a custom style sheet path:

1. Navigate to the Administration Console’s Branding page.
2. Enter the path to your customized style sheet in the Style Sheet Path field.
3. Click Save Changes to update your PeopleUpdate branding configuration.

Administration Console: Global Security Configuration Page

The PeopleUpdate Administration Console's Security page allows you to manage groups and access control lists that control how users can interact with PeopleUpdate. You can employ the access control lists you create using the Security page to show tabs to certain groups of users and to allow specific groups of users to edit attributes.

Accessing the Security Configuration Page

You must have administrative access to the PeopleUpdate Administration console to modify security settings.

To navigate to the Security page:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Click Security in the left navigation bar in the Global Configuration section.

Understanding PeopleUpdate Security

To control access to functionality, PeopleUpdate uses access control lists to determine which users can access certain areas of the application. An access control list consists of a set of one or more groups whose membership dictates the users who are part of the list. These groups include built in PeopleUpdate groups like SELF and MANAGER as well as Windows groups from your domain.

You will need to add groups from your domain to the PeopleUpdate security configuration and then create access control lists with those groups. Refer to the section below for more information about how to create access control lists in PeopleUpdate.

Built in PeopleUpdate Groups

PeopleUpdate includes two built in groups that you can include in your access control lists: SELF and MANAGER. These special groups compare the current authenticated PeopleUpdate application user against the users viewed in PeopleUpdate and determines the group(s) in which the authenticated user is a member based upon the authenticated user's relationship to the user being viewed in PeopleUpdate.

Built In Group	**Description**	**Scope**
SELF	Refers to the current user account accessing the PeopleUpdate application working with her own user account in the Detailed Results, Edit or Account Management pages. Compares the current user against the user displayed in the Detailed Results pane.	Single user
MANAGER	Refers to the current user account accessing the PeopleUpdate application and includes working with the chain of direct reports and descendants in an organizational hierarchy as defined by the Manager relationship in Active Directory. Compares the current user displayed in the Detailed Results page to determine if the user viewing the results is the Manager of the user being displayed.	All users reporting to a particular manager (direct reports only and does not include all users in the chain of command)

For example, if the user accessing PeopleUpdate is SAMPLEDOMAIN\AnyUser, this user has a SELF relationship to the AnyUser account in Active Directory. In a similar fashion, AnyUser has a MANAGER relationship to any direct reports for AnyUser.

Configuring User Authentication

PeopleUpdate retrieves information about the authenticated user from Active Directory. This operation requires searching Active Directory to find details about the authenticated user. The User Authentication Configuration options control how the user information is retrieved from Active Directory.

User Authentication Configuration

The User Authentication Configuration allows you to configure the search parameters to retrieve Active Directory information about the authenticated PeopleUpdate application user. If the search does not return results for the authenticated user based upon the parameters defined here, the application will load an empty user and some application functions may not work correctly.

LDAP Bind Path	LDAP bind path to the root of the container in which you are searching for authenticated user informat. The path should start with LDAP:// (in capital letters as this value is case sensitive) and the path indicates to PeopleUpdate where to bind to the directory to execute searches. Note: If you leave the LDAP Bind Path blank it will automatically try to locate a domain controller in the domain using the LDAP://RootDSE bind path, which is the default bind path that binds to the well-known root DSE object. If the authenticated user is still not found, the application will search the root of the forest using the Global Catalog.
Account Name	Account used to search Active Directory. The account needs Read access to all objects and attributes in Active Directory you want to search when authenticating a user. Example Proxy Account: YOURDOMAIN\PeopleUpdateServiceAcct or PeopleUpdateServiceAcct@yourdomain.local **Note**: For pre-windows 2000 accounts, account names can only be 20 characters long and are truncated at the 2-th character. You will need to truncate the account name you enter here if it is longer than 20 characters and you are using the NETBIOS form of the name. If your domain and account name are longer than 20 characters, use the UPN format of *accountname@domain* as a best practice.
Password	Password for the account
Check for External Associated Account	Indicates that PeopleUpdate should search for a linked External Associated Account (EAA) for the authenticated user. The EAA is linked through the msExchMasterAccountSid attribute on a user's mailbox in an Exchange Resource Forest. See the article at http://www.msexchange.org/tutorials/Understanding-External-Associated-Account-Windows-Server-2003-Exchange-2003.html for more information about External Associated Accounts.

Using Windows Groups for Access

You can use security and distribution groups from your domain to control access in PeopleUpdate. The groups you add to the PeopleUpdate security configuration can be included in access control lists that you can apply to attributes to allow editing and apply to tabs to allow groups of users to view the tab. You must add groups to the configuration before you can create access control lists using the groups.

To add a Windows group:

1. Navigate to the Administration Console’s Security page.
2. Enter the name of the Windows group in the Group Name field in the Group Configuration section. Ensure you qualify your group name properly by including the domain with the group in the form of MYDOMAIN\Group.
3. Click Add Group to add the group to the security configuration.

Using Access Control Lists to Manage PeopleUpdate Security

Access control lists help you determine who has access to PeopleUpdate functionality including attribute editing and tab viewing. You must apply access control lists to attributes to attributes to make them editable by users who are members of the access control list. You must also apply access control lists to tabs to hide them from certain users.

Creating and Changing Access Control Lists

Access control lists include groups whose members are also members of the access control list. PeopleUpdate uses access control lists to control security to application functionality including attribute editing and tab viewing.

You can set up as many access control lists as you need to satisfy the unique needs of your organization. Each access control list should have a set of related groups whose members need to perform similar operations in PeopleUpdate.

To create an access control list:

1. Navigate to the Administration Console's Security page.
2. Enter a descriptive name for the access control list in the Access Control List name field in the Access Control List Configuration: Attribute Editing section.
3. Click Add Access Control List to add the access control list to the security configuration.

Once you create an access control list, you need to add groups to it. Refer to the Adding a Windows group topic for more information about how to create groups to use to add to an access control list.

To change the name of an access control list

1. Navigate to the Administration Console's Security page.
2. Click Edit next to the access control list with the name you want to modify in the Access Control List Configuration: Attribute Editing section. This will put the access control list into edit mode.
3. Modify the name in the Access Control List Name field.
4. Click Save ACL to save your changes.

Managing Groups in an Access Control List

Access control lists use group membership to determine who has access to PeopleUpdate functionality. You can add and remove groups to and from an access control list to change which users are members of an access control list. You can also change the name of an access control list without affecting how it controls security access in the application.

To add groups to an access control list:

1. Navigate to the Administration Console's Security page.
2. Click Edit next to the access control list that contains the groups you want to modify in the Access Control List Configuration: Attribute Editing section. This will put the access control list into edit mode.
3. Select the name of the group you want to add to the access control list in the Group list.
4. Click Add Group to add the group to the access control list.
5. Add as many groups as you need to the access control list.
6. Click Save ACL to save your changes.

To remove groups from an access control list:

1. Navigate to the Administration Console's Security page.
2. Click Edit next to the access control list that contains the groups you want to modify in the Access Control List Configuration: Attribute Editing section. This will put the access control list into edit mode.
3. Click the X icon next to the group you want to remove from the access control list.
4. Remove as many groups as you need from the access control list.
5. Click Save ACL to save your changes.

Administration Console: Global Directory Configuration Page

The PeopleUpdate Administration Console's Global Directory page allows you to customize the PeopleUpdate directory configuration for the entire application. You can set bind paths, search parameters and proxy (service) account information. Values set on this page act as a global default for other global application entities such as attributes, page layout templates and secondary pages.

Accessing the Global Directory Configuration Page

You must have administrative access to the PeopleUpdate Administration console to modify global directory settings.

To navigate to the Global Directory page:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Click Global Directory in the left navigation bar in the Global Configuration section.

Testing the Directory Connection

PeopleUpdate allows you to test a directory connection to ensure you have the capability to at least bind to the directory using the LDAP bind path and proxy account credentials you set up in your global directory configuration.

To test the directory connection:

1. Make the directory changes you need to set up the application in your environment. Refer to the sections below for more information about configuring directory options.
2. When you've finished setting your directory options, click Save Changes to save your settings.
3. Click Test LDAP Connection to verify that your directory settings are okay and you can connect to the directory. It might take up to two minutes for a misconfigured connection to time out, so be patient when using this feature.

Setting an LDAP Bind Path

You may need to set the LDAP bind path for searches to restrict the bind scope for PeopleUpdate to a particular container or to bind to a particular domain controller (DC) for performing searches and updates.

LDAP Bind Path	LDAP bind path to the root of the container you are searching and managing. The path *should* start with LDAP:// (in capital letters as this value is case sensitive) or GC:// for Global Catalog searches and the path indicates to PeopleUpdate where to bind to the directory to execute searches. Note: If you leave the LDAP Bind Path blank it will automatically try to locate a domain controller in the domain root using the LDAP://RootDSE bind path, which is the default bind path that binds to the well-known root DSE object.

Example LDAP Bind Paths

The following LDAP bind paths give you an idea of the different ways you can bind to your Active Directory. You may use DNS names and server names to bind to the directory and you can specify the specific container to which PeopleUpdate should bind when it connects to the directory to execute an operation.

Assume your company's directory DNS name is *mycompany.com*.

- LDAP://mycompany.com/DC=mycompany,DC=com: Searches the root of the LDAP directory and looks up an LDAP server to use from DNS automatically.

- LDAP://dc.mycompany.com/DC=mycompany,DC=com: Searches the root of the LDAP directory and uses the DC/GC server *dc.mycompany.com* to perform the search.
- LDAP://dc.mycompany.com/CN=Users,DC=mycompany,DC=com: Searches the **Users** container of the LDAP directory and uses the DC/GC server *dc.mycompany.com* to perform the search.
- LDAP://dc.mycompany.com/OU=MyCompanyUsers,DC=mycompany,DC=com: Searches the **MyCompanyUsers** organizational unit (OU) of the LDAP directory and uses the DC/GC server *dc.mycompany.com* to perform the search.

Search Parameters

Configure search parameters to tweak the performance of your PeopleUpdate application. You will probably not need to change the default values often unless you have specific performance issues you need to address in your environment. Use the Default Search Filter and Group Search Filter to append a standard filter to every Active Directory search executed by PeopleUpdate.

Maximum Number Results	Maximum number of results for PeopleUpdate to return from a directory search. Enter zero (0) to return all matching results. Note: Most Microsoft Active Directory implementations limit the number of search results to 1000. Other vendors default size limits vary by vendor. Refer to your vendor's documentation for more information.
Search Time Limit	Maximum number of milliseconds to wait for a result from the directory while performing a search. Setting the parameter to -1 means to use the directory's default timeout and this is the recommended setting.
Default Search Filter	Specifies the LDAP search filter PeopleUpdate will use when performing every LDAP search. This value is ANDed with the other search criteria passed by users searching the directory. This option enables you to ensure you bind to the correct directory object when searching and helps speed searching by ensuring the search doesn't go through unnecessary directory object containers. • Example 1: (objectclass=person) only returns objects of type person. • Example 2: (objectclass=group) only returns objects of type group. • Example 3: (|(objectClass=person)(objectclass=group)) returns person or group objects. Note how it employs the nested parentheses and the OR symbol	to return user or group objects. • Example 4: (&(objectclass=person)(sn=Smith)) returns all person objects with the last name of Smith. Note the usage of the AND symbol & to ensure both conditions are met before returning results.

Proxy Account

The PeopleUpdate proxy account executes authenticated binds to your Active Directory and performs searches and updates under the proxy account security context. Refer to the Prerequisites section for more information on how to delegate the proper read and write permissions to the proxy account.

Account Name	Account used to search and update Active Directory. The proxy account needs Read and Write access to all attributes in Active Directory you want to search and update through PeopleUpdate. Example Proxy Account: YOURDOMAIN\PeopleUpdateServiceAcct or PeopleUpdateServiceAcct@yourdomain.local **Note**: For pre-windows 2000 accounts, account names can only be 20 characters long and are truncated at the 2-th character. You will need to truncate the account name you enter here if it is longer than 20 characters and you are using the NETBIOS form of the name. If your domain and account name are longer than 20 characters, use the UPN format of *accountname@domain* as a best practice.
Password	Password for the proxy account

Proxy Account Enabled	Specifies whether PeopleUpdate uses an authenticated bind under the proxy account's security context to bind and search the Active Directory. PeopleUpdate requires a proxy account in order to update directory objects since anonymous binds typically do not have sufficient privileges to update the directory.

Administration Console: Global Attributes Configuration Page

The PeopleUpdate Administration Console's to indicate which attributes are available for global pages. You can also set display properties about attributes that determine how they behave and render in the Search Console.

Accessing the Global Attributes Configuration Page

You must have administrative access to the PeopleUpdate Administration Console to modify the global attribute configuration.

To navigate to the Attributes page:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Click Global Attributes in the left navigation bar in the Global Configuration section.

Adding a New Attribute

You can easily add global attributes to the configuration and then make those attributes available for searching, displaying in results or editing.

Alias	Specifies a friendly display name users will see for the attribute in Search Console pages
LDAP Name	Designates the Active Directory LDAP name (displayname attribute) for the attribute

To add a new attribute:

1. Navigate to the Administration Console’s Global Attributes page.
2. Enter a friendly display name in the Alias field and the Active Directory name for the attribute in the LDAP Name field.
3. Click Add Attribute to add the attribute to your PeopleUpdate global attribute configuration.

Modifying an Attribute

Change the properties of attributes in your configuration to specify exactly how you want global attributes to behave. You will most often set up list choices, access control list and editing input masks using this procedure.

Alias	Specifies a friendly display name that users will see for the attribute in Search Console pages
LDAP Name	Designates the Active Directory LDAP name (displayname attribute) for the attribute
Deny Wildcard	Enforces a global denial for using wildcarding while searching. Items that have Store as DN checked automatically set themselves to deny wildcarding since an attribute stored by its distinguished name cannot be wildcarded in a search.
Store by DN	Ensures the attribute you are configuring is searched in the directory using its distinguished name. PeopleUpdate automatically performs a second search on all items stored by distinguished name and returns the LDAP cn attribute to display as the friendly name.
Access Control List	Specifies the access control list (ACL) to use to secure who can edit the attribute. Use the drop-down list to select an access control list to apply to the attribute. You can create new access control lists on the Security page. **Note**: You cannot set an ACL for the "c" and "countryCode" attributes since these are special attributes used in conjunction with the "co" attribute that updates a user's country based upon the ISO-3166 standard. You may only set an ACL for the "co" (Country Name) attribute using PeopleUpdate.

List Choices	Displays the items currently in the list and allows you to add new items to the list. When you add new items, set the Display Text to the text you want to show in the list. Set the Search Filter to the actual search filter you want to match for the attribute. You can leave this value blank if you want to search using the Display Text. For example, you can set the Department attribute's choice list Display Text to "HR" while setting the Search Filter to "ldap:(|(HR*)(Human Resources*))" and this would cause PeopleUpdate to search for a match for either HR or Human Resources, not just HR. Note that using the "ldap:" text before the search filter allows you to input a complete LDAP search filter to use for searching. PeopleUpdate allows you to configure a Stored Value setting that is different from the Display Text and Search Filter values. The Stored Value designates the actual text value to store in Active Directory when an attribute value is updated using a PeopleUpdate choice list. This functionality allows you to support, among other scenarios, a multi-lingual environment where the AD value is stored in one language but the Display Text can be a different language to show in each tab. You may use the Show Active Directory values not in list on Search Console Edit pages check box to show Active Directory values that are not in a choice list when on the Edit page updating a choice list value. This adds the value not in the list to the list so that a user can update the data to the same value. For example, if your Department attribute choice list contains four values, HR, IT, Marketing and Sales, this option would show an additional item called Accounting when editing a user who's department is set to Accounting in Active Directory. **Note**: The Show Active Directory values not in list on Search Console Edit pages check box only shows in the List Choices options when you have added at least one item to the list. You can also set the default selected item or delete an item from the list.
List Preview	Displays the list choices in a drop-down list
Enable Input Mask	Click the checkbox to enable an input mask for users when editing attributes. **Note**: Enabling the input mask can only be done if there is no drop-down list present. You must delete each item from the drop-down list from List Choices before the Enable Input Mask checkbox is enabled.
Input Mask	Input mask to be used on the edit page 0 Digit (0 through 9, entry required; plus [+] and minus [-] signs not allowed). 9 Digit or space (entry not required). # Digit or space (entry required). L Letter (A through Z, entry required). ? Letter (A through Z, entry optional). A Letter or digit (entry required). a Letter or digit (entry optional). & Any character or a space (entry required). C Any character or a space (entry optional). . , : ; - / Decimal placeholder and thousands, date, and time separators. (The actual character used depends on the regional settings specified in Microsoft Windows Control Panel.) < Causes all characters that follow to be converted to lowercase. > Causes all characters that follow to be converted to uppercase. \ If in front of any character appears the "\" (escape) character, then that

	character becomes the literal part of mask. For example, if mask is set to the "A\AB\B\\\##\99" and control has no data, then text in edit mode will appear as "_ABB\#_9_". Where the "_" are available positions for entry **Note:** • To cancel upper/lower case convention which was set by the > or < flag, that flag should be used one more time. For example, if mask is set to the ">CC->CC->CC" and user entered the "XxXxXx", then resulting text should appear as "XX-Xx-XX". • While control has no input focus, the optional empty mask positions are not displayed. The following table shows some useful input mask definitions and examples of values you can enter into them. (000) 000-0000 (206) 555-0248 (000) AAA-AAAA (206) 555-TELE
URI Configuration	**Render E-Mail Addresses as Linkable**: Controls the link behavior of e-mail address values for this attribute. Default inherits the global value set on the Branding page. True overrides the global settings and always renders e-mail addresses as links. False overrides the global settings and never renders e-mail addresses as links. **Render URIs as Linkable**:Controls the link behavior of Universal Resource Indicator (URI) values for this attribute. Default inherits the global value set on the Branding page. True overrides the global settings and always renders URIs as links. False overrides the global settings and never renders URIs as links. URI Target: Specifies the target for URIs rendered as links for this attribute and overrides the global value set on the Branding page. You can use the default HTML options of "_blank," "_parent," "_self" or "_top." You may also enter a name for a window and all links for this attribute will target the same new window.
Text Box Configuration	Default width of the edit text box for this attribute. Overrides the global value set on the Branding page

To edit an attribute:

1. Navigate to the Administration Console’s Attributes page.
2. Select the tab that contains the attribute configuration you want to edit.
3. Click Edit next to the attribute you want to modify and you will enter edit mode for the attribute.
4. Make any changes you'd like to the attribute, including setting the alias and name, wildcarding, access control lists, editing input masks and list choices.
5. Click Save to update the attribute configuration changes. Click Cancel to revert your edit mode changes without saving.

   Note: Any changes you save for an attribute automatically update throughout the application for all pages.

Deleting an Attribute

To delete an existing attribute, click the X in the right column of the attribute you want to delete. After you confirm this operation, it deletes the attribute and any references to it in the remainder of the application, including search and results pages.

Page Layout Templates

Administration Console: Understanding Page Layout Templates

Understanding Page Layout Templates

PeopleUpdate provides page layout templates that allow you create reusable page layouts to display data in your Active Directory. Page layout templates contain configuration information about which attributes you want to display on a page and you can reuse the same page layout template in multiple global configuration pages such as secondary pages. This makes it easier to share a page layout while also updating all pages that use a page layout template by automatically updating related pages when a page layout template changes.

You work with page layout templates in the same way as other page layouts in PeopleUpdate, by accessing the layout, adding rows, columns and attributes, and configuring properties specific to the page layout template's page type.

Administration Console: Page Layout Templates Configuration Page

The Page Layout Templates configuration page allows you to set up page layout templates in PeopleUpdate. Page layout templates are reusable page layouts that can easily be shared with global PeopleUpdate pages. You can configure as many page layout templates as you'd like and each page layout template may have its own unique page layout and data. Page layout templates are associated with a page type and different page types allow you to configure specific properties for each page type.

Accessing the Page Layout Templates Configuration Page

You must have administrative access to the PeopleUpdate Administration Console to modify the page layout template configuration.

To navigate to the Page Layout Templates page:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Click Page Layout Templates in the left navigation bar in the Global Configuration section.

Managing Page Layout Templates

PeopleUpdate provides page layout templates to easily allow you to reuse page layouts and configurations. Check out the Understanding Page Layout Templates topic for more information about page layout templates.

Creating Page Layout Templates

Page layout templates encapsulate page layouts and configurations. You can easily add page layout templates through the Page Layout Templates configuration page.

To add a page layout template:

1. Navigate to the Administration Console’s Page Layout Templates page.
2. Enter a name for the new page layout template in the Template Name field.
3. Choose the page type for the new template. Be sure to choose the correct page type because you cannot change this later.
4. Click Create New Page Layout Template to create a new page layout template and add it to the configuration.
5. You will see the new page layout template appear in the Page Layout Template list and you can now edit the page layout template name.

Changing Page Layout Template Names

You can change the name of existing page layout templates without impacting how PeopleUpdate works.

To change the name of a page layout template:

1. Navigate to the Administration Console’s Page Layout Templates page.
2. Choose Edit for the page layout template whose name you want to update.
3. Enter the new name and click Save to save your changes or Cancel to revert your changes to the previous value.

Deleting Page Layout Templates

You can delete page layout templates and all the related configuration and page data if you no longer need to use the page layout template.

To delete a page layout template from a tab:

1. Navigate to the Administration Console’s Page Layout Templates page.
2. Click the X icon next to the page layout template you want to delete.

3. Click OK to delete the page layout template and all its related data or Cancel to avoid deleting the page layout template. Note that you cannot recover deleted page layout templates or related items and the change is permanent.

Administration Console: Individual Page Layout Template Configuration Page

The (individual) Page Layout Template configuration page allows you to configure individual page layout templates in PeopleUpdate. You can set properties for each page layout template independent of other page layout templates using this page.

Accessing the Page Layout Template Configuration Page

You must have administrative access to the PeopleUpdate Administration Console to modify a page layout template's configuration.

To navigate to the Page Layout Template page:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Expand Page Layout Templates in the left navigation bar in the Global Configuration section.
3. Click the name of the page layout template you want to configure.

Configuring Page Layout Template Properties

PeopleUpdate provides page layout templates to easily allow you to reuse page layouts and configurations. Check out the Understanding Page Layout Templates topic for more information about page layout templates.

Setting Property Values and Property Inheritance

The properties available for a page layout template depend on the page type. In some cases, properties may be inherited from another configuration setting like global directory configuration. You will notice a blue icon next to properties that are inherited. Property inheritance for page layout templates comes from the global directory configuration.

You can turn off property inheritance and easily set a new value by selecting the check box next to a property. This will enable the field display so that you can change the value. You can turn inheritance back on by unchecking the check box.

Laying Out Pages

Use the Page Layout Editor to configure the display of each page layout template in PeopleUpdate. The cells that display in the row and column layouts allow you to pinpoint exactly where you want an attribute to display on a page.

To change rows and columns in a page layout template:

1. Navigate to the Administration Console’s page layout template in which you want to change rows and columns.
2. Click the up arrow icon next to the Rows and Columns labels in the Page Layout Editor section to add a row or column. Conversely, click the down arrow icon to remove the bottom row or column on the right. All attributes displayed in a row or column are removed when you remove a row or column.

   Note: All page layout changes are immediately saved in the configuration and you do not need to click Save Changes to change your page layout template configuration.

Adding and Removing Attributes to and from Page Layout Templates

You can add and remove attributes to display in a page layout template. The Available Attributes list allows you to add attributes you've defined in the Global Attributes configuration page of your configuration to the page layout. You can add zero, one or more attributes to each display cell. The interface also allows you to easily move attributes around a cell and to remove attributes from a cell.

To add attributes to a page layout:

1. Navigate to the Administration Console’s page layout template in which you want to change rows and columns.
2. Select an attribute to add to the page layout using the Available Attributes list.

3. Select a Row and Column to which to add the attribute. You can always move the attribute to another cell after you add it if you select an incorrect cell initially.
4. Click Add Attribute to add the attribute to the selected cell.
5. If so desired, you can move attributes around the screen layout using the arrow keys next to each display cell. In addition, you can remove an attribute from a cell.

To remove attributes from a page layout:

1. Navigate to the Administration Console's page layout template in which you want to change rows and columns.
2. Click the name of the attribute to remove in the cell in the Page Layout Editor where the attribute resides.
3. Click the X icon on the lower-right side of the cell to remove the cell from the page layout.

To move attributes among cells in a page layout:

1. Navigate to the Administration Console's page layout template in which you want to change rows and columns.
2. Click the name of the attribute to move in the cell in the Page Layout Editor where the attribute resides.
3. Click the up, down, left or right arrow icon next to the cell to move the selected attribute to another cell in the page layout.

Secondary Pages

Administration Console: Understanding Secondary Pages

Understanding Secondary Pages

PeopleUpdate uses secondary pages for a highly configurable search interface for updating certain types of data in Active Directory, specifically attribute data stored by distinguished name. This type of attribute--which includes Manager, Assistant, Secretary, Groups, Group Members, etc--requires a lookup to find another Active Directory object to use to populate the attribute value. These secondary pages are rendered in the Search Console as pop-up pages from the PeopleUpdate Edit page.

You can associate secondary pages with a page layout template to quickly and easily lay out a page. Secondary pages also have their own configuration information that can override the page layout template's configuration values through inheritance.

Understanding How Secondary Pages Relate to Attributes

You can specify which secondary pages to use to search and display summary information for an LDAP attribute on a tab when editing the attribute. Refer to the Attributes topic for more information about relating attributes to secondary pages

Administration Console: Secondary Pages Configuration Page

The Secondary Pages configuration page allows you to create secondary pages to manage editing of Active Directory attributes stored by distinguished name.

Accessing the Secondary Pages Configuration Page

You must have administrative access to the PeopleUpdate Administration Console to modify the global secondary page configuration.

To navigate to the Secondary Pages page:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Click Secondary Pages in the left navigation bar in the Global Configuration section.

Managing Secondary Pages

PeopleUpdate includes secondary pages to provide highly customizable search pages that allow you to easily manage Active Directory attributes stored by distinguished names. Check out the Understanding Secondary Pages topic for more information about secondary pages.

Creating Secondary Pages

Secondary pages provide the ability to edit distinguished name attributes in Active Directory. You can easily add secondary pages to your configuration.

To add a secondary page:

1. Navigate to the Administration Console's Secondary Pages configuration page.
2. Enter a name for the new secondary page in the Page Name field.
3. Choose the page layout template for the new secondary page. Be sure to choose the correct page layout template because changes to this later can cause data loss if you change to a template with a different page type.
4. Click Create New Secondary Page to create a new secondary page.
5. You will see the new secondary page appear in the Secondary Page list and you can now edit the secondary page name.

Changing Secondary Page Names

You can change the name of existing secondary pages without impacting how PeopleUpdate works.

To change the name of a secondary page:

1. Navigate to the Administration Console's Secondary Pages configuration page.
2. Choose Edit for the secondary page whose name you want to update.
3. Enter the new name and click Save to save your changes or Cancel to revert your changes to the previous value.

Deleting Secondary Pages

You can delete secondary pages and all the related configuration and page data if you no longer need to use the secondary page.

To delete a secondary page from a tab:

1. Navigate to the Administration Console's Secondary Pages configuration page.
2. Click the X icon next to the secondary page you want to delete.

3. Click OK to delete the secondary page and all its related data or Cancel to avoid deleting the secondary page. Note that you cannot recover deleted secondary pages and the change is permanent.

Administration Console: Individual Secondary Page Configuration Page

The (individual) Secondary Page configuration page allows you to configure individual secondary pages in PeopleUpdate. You can set properties for each secondary page independent of other secondary pages using this page.

Accessing the Secondary Page Configuration Page

You must have administrative access to the PeopleUpdate Administration Console to modify a secondary page's configuration.

To navigate to the Secondary Page page:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Expand Secondary Pages in the left navigation bar in the Global Configuration section.
3. Click the name of the secondary page you want to configure.

Configuring Secondary Page Properties

PeopleUpdate includes secondary pages to provide highly customizable search pages that allow you to easily manage Active Directory attributes stored by distinguished names. Check out the Understanding Secondary Pages topic for more information about secondary pages.

Setting Property Values and Property Inheritance

The properties available for a secondary page depend on the page type. In some cases, properties may be inherited from another configuration setting like the page layout template or global directory configuration. You will notice a blue icon next to properties that are inherited. Property inheritance for secondary pages comes from the page layout template with which it's associated and, in turn, from the global directory configuration if the page layout template does not override global directory properties.

You can turn off property inheritance and easily set a new value by selecting the check box next to a property. This will enable the field display so that you can change the value. You can turn inheritance back on by unchecking the check box.

Associating Secondary Pages with Attributes

You can use secondary pages in tab-level attribute searches for Active Directory distinguished name (DN) attributes. Refer to the Attributes topic for more information about how to associate a secondary page with a tab-level attribute.

Tab Configuration

Administration Console: Tabs Configuration Page

The tabs you set up in PeopleUpdate allow you to manage your Active Directory by subdividing it into silos of information most appropriate to your organization. Each tab has a completely independent directory, attribute and page configuration than other tabs, allowing you myriad capabilities to customize your PeopleUpdate installation. You can set up tabs for each department within your organization, for each major office location or for different functional groups. The possibilities are really only limited by your imagination and your organization's needs.

Use the Tabs configuration page in the Tab Configuration section of the Administration Console to create, move, delete and set properties for tabs.

Accessing the Tabs Configuration Page

You must have administrative access to the PeopleUpdate Administration Console to modify tabs.

To navigate to the Tabs page:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Click Tabs in the left navigation bar in the Tab Configuration section.

Creating New Tabs

You can add tabs to your configuration to create a new configuration set that has a customized directory, attribute and task nav configuration. The tab's collection of configuration settings is completely independent of other tabs' settings and allows you to highly tailor the tab to meet the needs of a particular group within your organization.

You must create a new tab by copying an existing tab. This requirement makes it easier to configure the new tab since the new tab already has configuration data and you do not have to start from scratch to create it.

To create a new tab:

1. Navigate to the Administration Console's Tabs page.
2. Enter a name for the tab in the Name field.
3. Select a tab to use as a model to create the new tab in the Copy From list. Choose the tab that has the most similar configuration to the new tab you are creating.
4. Click Add Tab to create the new tab.

Changing Tab Order

The order in which tabs display allows you to group functional tabs near each other to allow intuitive access for your users. The tab display order from top to bottom as shown on the Tabs configuration page translates to a left to right display in the Search Console.

To move a tab up or down:

1. Navigate to the Administration Console's Tabs page.
2. Click the up arrow to move the tab up in the order. Click the down arrow to move the tab down in the order.

Changing the Name of a Tab

Tabs display their name in the Search Console when users view them. You can change the name of a tab without negatively impacting the application.

To change a tab's name:

1. Navigate to the Administration Console's Tabs page.
2. Click Edit next to the tab you want to hide.
3. Enter the new name for the tab.
4. Click Save to save the changes to the tab.

Showing and Hiding Tabs from Users

One of the most powerful capabilities the new tab feature in PeopleUpdate v3.0 is the ability to show and hide tabs only to designated users. You can set up a tab's security configuration to hide sensitive information like employee IDs from unauthorized users by hiding the tab from those users. This feature allows you to also control the number of tabs your users see by targeting relevant tabs to groups of users who need those tabs to do their jobs.

To implement security to show or hide a tab from certain users:

1. Navigate to the Administration Console's Tabs page.
2. Click Edit next to the tab you want to hide.
3. Select the access control list you want to apply to the tab from the Access Control List list box. The access control list group members will be the only users who can see the tab; other users outside of those groups will not see the tab at all.
4. Click Save to save the changes to the tab.

Localizing Tabs

Not only can you localize your PeopleUpdate application at the global level, you can override the global localization with a tab-level localization. You might want to use this feature if you are a multi-national corporation operating offices in locations that speak multiple languages. You can then expose PeopleUpdate to each office in their native language and consolidate administration to one PeopleUpdate instance instead of managing multiple application distributions.

If you do not set a localization file or if the file cannot be located for the tab then the tab will use the global localization file. If there is no global localization file available then the tab (and entire application) will use the default language implementation.

Refer to the Branding configuration topic for setting up a global localization file.

To localize a tab:

1. Navigate to the Administration Console's Tabs page.
2. Click Edit next to the tab you want to localize.
3. Enter the path to the localization file to use for the tab. You can enter the path as a local file path, a UNC path or an HTTP path. Basically, if the path is accessible by the web server then it should be valid.
4. Click Save to save the changes to the tab.

Setting the No Data Found Message for a Tab

Not only can you set a default message when no data is found in PeopleUpdate, you can override the global message with a tab-level message. You might want to use this feature if you want to have a different message on a tab, for example, with a different contact telephone number for resolving the data issue.

If you do not set a No Data Found Message for the tab then the tab will use the global No Data Found Message.

Refer to the Branding configuration topic for setting up a global No Data Found Message.

To set a No Data Found Message for a tab:

1. Navigate to the Administration Console's Tabs page.
2. Click Edit next to the tab on which you want to change the No Data Found Message.
3. Enter the No Data Found Message to use for the tab.
4. Click Save to save the changes to the tab.

Deleting Tabs

You can delete tabs from the interface if they no longer meet your needs or if your interface gets too cluttered. Use care when deleting tabs, though, since deleted tabs are permanently removed from the configuration and you cannot recover them.

To delete a tab:

1. Navigate to the Administration Console’s Tabs page.
2. Click the X icon next to the tab you want to delete.
3. Confirm the deletion in the dialog box that appears. Remember that you cannot undo this operation and the tab will be permanently deleted from the configuration.

Administration Console: Directory Configuration Page

Customize the PeopleUpdate directory configuration for a tab using the Directory configuration page in the Administration Console. You can set bind paths, search parameters and proxy (service) account information using this page.

Accessing the Directory Configuration Page

You must have administrative access to the PeopleUpdate Administration Console to modify the directory configuration for a tab.

To navigate to the Directory page:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Click Directory in the left navigation bar in the Tab Configuration section.

Testing the Directory Connection

PeopleUpdate allows you to test a directory connection to ensure you have the capability to at least bind to the directory using the LDAP bind path and proxy account credentials you set up in your directory configuration for the tab.

To test the directory connection:

1. Make the directory changes you need to set up the application in your environment. Refer to the sections below for more information about configuring directory options.
2. When you've finished setting your directory options, click Save Directory Changes to save your settings.
3. Click Test Connection to verify that your directory settings are okay and you can connect to the directory. It might take up to two minutes for a misconfigured connection to time out, so be patient when using this feature.

Setting LDAP Bind Paths

You may need to set the LDAP bind paths for regular and group searches to restrict the bind scope for PeopleUpdate to a particular container or to bind to a particular DC for performing searches and updates.

LDAP Bind Path	LDAP bind path to the root of the container you are searching and managing. The path *should* start with LDAP:// (in capital letters as this value is case sensitive) and the path indicates to PeopleUpdate where to bind to the directory to execute searches. Note: If you leave the LDAP Bind Path blank it will automatically try to locate a domain controller in the domain using the LDAP://RootDSE bind path, which is the default bind path that binds to the well-known root DSE object.
LDAP Group Bind Path	LDAP search path for group searches. This path is used when updating the memberof attribute of user objects.

Example LDAP Bind Paths

The following LDAP bind paths give you an idea of the different ways you can bind to your Active Directory. You may use DNS names and server names to bind to the directory and you can specify the specific container to which PeopleUpdate should bind when it connects to the directory to execute an operation.

Assume your company's directory DNS name is *mycompany.com*.

- LDAP://mycompany.com/DC=mycompany,DC=com: Searches the root of the LDAP directory and looks up an LDAP server to use from DNS automatically.

- LDAP://dc.mycompany.com/DC=mycompany,DC=com: Searches the root of the LDAP directory and uses the DC/GC server *dc.mycompany.com* to perform the search.
- LDAP://dc.mycompany.com/CN=Users,DC=mycompany,DC=com: Searches the **Users** container of the LDAP directory and uses the DC/GC server *dc.mycompany.com* to perform the search.
- LDAP://dc.mycompany.com/OU=MyCompanyUsers,DC=mycompany,DC=com: Searches the **MyCompanyUsers** organizational unit (OU) of the LDAP directory and uses the DC/GC server *dc.mycompany.com* to perform the search.

Search Parameters

Configure search parameters to tweak the performance of your PeopleUpdate application. You will probably not need to change the default values often unless you have specific performance issues you need to address in your environment. Use the Default Search Filter and Group Search Filter to append a standard filter to every Active Directory search executed by PeopleUpdate.

Maximum Number Results	Maximum number of results for PeopleUpdate to return from a directory search. Enter zero (0) to return all matching results. Note: Most Microsoft Active Directory implementations limit the number of search results to 1000. Other vendors default size limits vary by vendor. Refer to your vendor's documentation for more information.
Search Time Limit	Maximum number of milliseconds to wait for a result from the directory while performing a search. Setting the parameter to -1 means to use the directory's default timeout and this is the recommended setting.
Default Search Filter	Specifies the LDAP search filter PeopleUpdate will use when performing every LDAP search. This value is ANDed with the other search criteria passed by users searching the directory. This option enables you to ensure you bind to the correct directory object when searching and helps speed searching by ensuring the search doesn't go through unnecessary directory object containers. • Example 1: (objectclass=person) only returns objects of type person. • Example 2: (objectclass=group) only returns objects of type group. • Example 3: (|(objectClass=person)(objectclass=group)) returns person or group objects. Note how it employs the nested parentheses and the OR symbol	to return user or group objects. • Example 4: (&(objectclass=person)(sn=Smith)) returns all person objects with the last name of Smith. Note the usage of the AND symbol & to ensure both conditions are met before returning results.
Group Search Filter	Specifies the LDAP search filter PeopleUpdate will use when performing group LDAP search. This value is used in conjunction with the LDAP Group Base DN to filter groups returned when updating the memberof attribute of user objects. This value is ANDed with the other search criteria passed by users searching the directory. This option enables you to ensure you bind to the correct directory object when searching and helps speed searching by ensuring the search doesn't go through unnecessary directory object containers. • Example 1: (objectclass=person) only returns objects of type person. • Example 2: (objectclass=group) only returns objects of type group. • Example 3: (|(objectClass=person)(objectclass=group)) returns person or group objects. Note how it employs the nested parentheses and the OR symbol	to return user or group objects. • Example 4: (&(objectclass=person)(sn=Smith)) returns all person objects with the last name of Smith. Note the usage of the AND symbol & to ensure both conditions are met before returning results.
Allow Empty Searches	Users must populate at least one attribute in the Search Console's Search page when this is unchecked

Proxy Account

The PeopleUpdate proxy account executes authenticated binds to your Active Directory and performs searches and updates under the proxy account security context. Refer to the Prerequisites section for more information on how to delegate the proper read and write permissions to the proxy account.

Account Name	Account used to search and update Active Directory. The proxy account needs Read and Write access to all attributes in Active Directory you want to search and update through PeopleUpdate. Example Proxy Account: YOURDOMAIN\PeopleUpdateServiceAcct or PeopleUpdateServiceAcct@yourdomain.local **Note**: For pre-windows 2000 accounts, account names can only be 20 characters long and are truncated at the 2-th character. You will need to truncate the account name you enter here if it is longer than 20 characters and you are using the NETBIOS form of the name. If your domain and account name are longer than 20 characters, use the UPN format of *accountname@domain* as a best practice.
Password	Password for the proxy account
Proxy Account Enabled	Specifies whether PeopleUpdate uses an authenticated bind under the proxy account's security context to bind and search the Active Directory. PeopleUpdate requires a proxy account in order to update directory objects since anonymous binds typically do not have sufficient privileges to update the directory.

Administration Console: Attributes Configuration Page

Use the PeopleUpdate Administration Console Attributes configuration page to indicate which attributes are available on a particular tab. You can also set display properties about attributes that determine how they behave and render in the Search Console.

Accessing the Attribute Configuration Page

You must have administrative access to the PeopleUpdate Administration Console to modify the attribute configuration for a tab.

To navigate to the Attributes page:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Click Attributes in the left navigation bar in the Tab Configuration section.

Adding a New Attribute to a Tab Configuration

You can easily add attributes to the configuration and then make those attributes available for searching, displaying in results or editing.

Alias	Specifies a friendly display name users will see for the attribute in Search Console pages
LDAP Name	Designates the Active Directory LDAP name (displayname attribute) for the attribute

To add a new attribute:

1. Navigate to the Administration Console's Attributes page.
2. Select the tab to which you want to add the new attribute.
3. Enter a friendly display name in the Alias field and the Active Directory name for the attribute in the LDAP Name field.
4. Click Add Attribute to add the attribute to your PeopleUpdate attribute configuration for the current tab.

Associating an Attribute with a Secondary Page

You can configure an attribute to use secondary pages for attribute editing, including both a search and summary page. Secondary pages are useful for attributes stored by distinguished name (DN), including Assistant, Manager, Groups, Group Members, and Secretary. Clicking the search icon next to the attribute on the PeopleUpdate edit page will open the specified secondary pages for searches and summary results.

Note: If you do not specify a secondary search page, the search and summary results page from the task item will be used.

To set a secondary page for an attribute:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Click Attributes in the left navigation bar in the Tab Configuration section.
3. Edit the attribute for which to set secondary pages.
4. Choose the appropriate Secondary Search and Summary Page for your needs. See the Secondary Pages property documentation for more information.
5. Save the change to the attribute.

Modifying an Attribute

Change the properties of attributes in your configuration to specify exactly how you want attributes to behave for a tab. You will most often set up list choices, access control list and editing input masks using this procedure.

Alias	Specifies a friendly display name that users will see for the attribute in Search Console pages
LDAP Name	Designates the Active Directory LDAP name (displayname attribute) for the attribute
Deny Wildcard	Enforces a global denial for using wildcarding while searching. Items that have Store as DN checked automatically set themselves to deny wildcarding since an attribute stored by its distinguished name cannot be wildcarded in a search.
Store by DN	Ensures the attribute you are configuring is searched in the directory using its distinguished name. PeopleUpdate automatically performs a second search on all items stored by distinguished name and returns the LDAP cn attribute to display as the friendly name.
Access Control List	Specifies the access control list (ACL) to use to secure who can edit the attribute. Use the drop-down list to select an access control list to apply to the attribute. You can create new access control lists on the Security page. **Note**: You cannot set an ACL for the "c" and "countryCode" attributes since these are special attributes used in conjunction with the "co" attribute that updates a user's country based upon the ISO-3166 standard. You may only set an ACL for the "co" (Country Name) attribute using PeopleUpdate.
List Choices	Displays the items currently in the list and allows you to add new items to the list. When you add new items, set the Display Text to the text you want to show in the list. Set the Search Filter to the actual search filter you want to match for the attribute. You can leave this value blank if you want to search using the Display Text. For example, you can set the Department attribute's choice list Display Text to "HR" while setting the Search Filter to "ldap:(|(HR*)(Human Resources*))" and this would cause PeopleUpdate to search for a match for either HR or Human Resources, not just HR. Note that using the "ldap:" text before the search filter allows you to input a complete LDAP search filter to use for searching. PeopleUpdate allows you to configure a Stored Value setting that is different from the Display Text and Search Filter values. The Stored Value designates the actual text value to store in Active Directory when an attribute value is updated using a PeopleUpdate choice list. This functionality allows you to support, among other scenarios, a multi-lingual environment where the AD value is stored in one language but the Display Text can be a different language to show in each tab. You may use the Show Active Directory values not in list on Search Console Edit pages check box to show Active Directory values that are not in a choice list when on the Edit page updating a choice list value. This adds the value not in the list to the list so that a user can update the data to the same value. For example, if your Department attribute choice list contains four values, HR, IT, Marketing and Sales, this option would show an additional item called Accounting when editing a user who's department is set to Accounting in Active Directory. **Note**: The Show Active Directory values not in list on Search Console Edit pages check box only shows in the List Choices options when you have added at least one item to the list. You can also set the default selected item or delete an item from the list.
List Preview	Displays the list choices in a drop-down list
Enable Input Mask	Click the checkbox to enable an input mask for users when editing attributes. **Note**: Enabling the input mask can only be done if there is no drop-down list present. You must delete each item from the drop-down list from List Choices before the Enable Input Mask checkbox is enabled.
Input Mask	Input mask to be used on the edit page 0 Digit (0 through 9, entry required; plus [+] and minus [-] signs not allowed).

9 Digit or space (entry not required).

Digit or space (entry required).

L Letter (A through Z, entry required).

? Letter (A through Z, entry optional).

A Letter or digit (entry required).

a Letter or digit (entry optional).

& Any character or a space (entry required).

C Any character or a space (entry optional).

. , : ; - / Decimal placeholder and thousands, date, and time separators. (The actual character used depends on the regional settings specified in Microsoft Windows Control Panel.)

< Causes all characters that follow to be converted to lowercase.

> Causes all characters that follow to be converted to uppercase.

\ If in front of any character appears the "\" (escape) character, then that character becomes the literal part of mask. For example, if mask is set to the "A\AB\B\\##\99" and control has no data, then text in edit mode will appear as "_ABB\#_9_". Where the "_" are available positions for entry

Note:

- To cancel upper/lower case convention which was set by the > or < flag, that flag should be used one more time. For example, if mask is set to the ">CC->CC->CC" and user entered the "XxXxXx", then resulting text should appear as "XX-Xx-XX".
- While control has no input focus, the optional empty mask positions are not displayed.

The following table shows some useful input mask definitions and examples of values you can enter into them.

(000) 000-0000   (206) 555-0248

(000) AAA-AAAA   (206) 555-TELE

URI Configuration	**Render E-Mail Addresses as Linkable**: Controls the link behavior of e-mail address values for this attribute. Default inherits the global value set on the Branding page. True overrides the global settings and always renders e-mail addresses as links. False overrides the global settings and never renders e-mail addresses as links. **Render URIs as Linkable**:Controls the link behavior of Universal Resource Indicator (URI) values for this attribute. Default inherits the global value set on the Branding page. True overrides the global settings and always renders URIs as links. False overrides the global settings and never renders URIs as links. **URI Target**: Specifies the target for URIs rendered as links for this attribute and overrides the global value set on the Branding page. You can use the default HTML options of "_blank," "_parent," "_self" or "_top." You may also enter a name for a window and all links for this attribute will target the same new window.
Text Box Configuration	Default width of the edit text box for this attribute. Overrides the global value set on the Branding page
Secondary Pages	You can set secondary search pages to change the search page behavior for Active Directory attributes stored by distinguished name (DN). If you do not set secondary pages, the search and summary results pages from the task item are

used instead.

Secondary Search Page: Set the secondary search page that you want to display when this distinguished name attribute is edited. This page will pop up when the search icon is clicked on the edit page.

Secondary Search Page: Set the secondary summary page that you want to use to display results when a secondary page search executes.

To edit an attribute:

1. Navigate to the Administration Console's Attributes page.
2. Select the tab that contains the attribute configuration you want to edit.
3. Click Edit next to the attribute you want to modify and you will enter edit mode for the attribute.
4. Make any changes you'd like to the attribute, including setting the alias and name, wildcarding, access control lists, editing input masks and list choices.
5. Click Save to update the attribute configuration changes. Click Cancel to revert your edit mode changes without saving.

   Note: Any changes you save for an attribute automatically update throughout the application for all pages.

Setting Up Group Management

You can control group membership using two attributes in PeopleUpdate. These attributes include the memberOf and member attributes (LDAP names), which correspond to the user and group object types, respectively. You control membership from the user side using the memberOf attribute and membership from the group side using the member attribute. If you apply an access control list that allows users to access either of these attributes, the PeopleUpdate edit page interface will render a search icon for the attribute and allow users to modify membership by looking up groups or users.

Note: When modifying group membership from the group side, you must ensure that groups are searchable and returned in your search results so you can manage them. To do this, you typically modify the Default Search Filter on the Directory configuration page to something like "(|(objectcategory=person)(objectcategory=group))," which returns all users and groups. Optionally, you can change the filter to only return groups.

Finally, you can easily enable group management from the user side by setting an ACL for the memberOf attribute and putting the attribute on the edit page. This will allow authorized users to change group memberships for individual users by editing the user's account.

Deleting an Attribute

To delete an existing attribute, click the X in the right column of the attribute you want to delete. After you confirm this operation, it deletes the attribute and any references to it in the remainder of the application, including search and results pages.

Controlling Access to Account Management Features

You can control access to account management features available on a tab by changing the access control lists that apply to account management operations.

SetPassword	ACL applied here controls who has access to set passwords on user accounts
EnableAccount	ACL applied here controls who has access to enable or disable user accounts
UnlockAccount	ACL applied here controls who has access to unlock locked out user accounts
ChangePassword	ACL applied here controls who has access to change passwords on user accounts

Controlling Access to Object Provisioning Features: Deleting Objects

You can control access to object provisioning features available on a tab by changing the access control lists that apply to these operations. This specifically applies to giving users the ability to delete objects from the directory.

Warning: This is a very powerful feature that absolutely deletes an object from the directory and use care when assinging access control lists to this feature.

DeleteObject	ACL applied here controls who has access to delete objects on the tab; this applies to all objects accessible on the tab, except when you use the special SELF and MANAGER access control entries

Task Items

Administration Console: Understanding Task Items

Understanding Task Items

PeopleUpdate uses task items to allow you to gain the ultimately flexibility from the information in your Active Directory. Task items display on the left Task Nav bar in the PeopleUpdate Search Console and they empower you to create much more than just a single search interface for finding users. You can use task items to provide alternate search pages with different attributes, to link directly to a summary results page displaying a set of pre-configured results or to display a detailed results page for an object in your Active Directory.

Understanding Task Item Page Flows

Task items allow you to subdivide a tab’s pages into different page flows and each page flow can include a custom set of search, summary results, detailed results, edit and account management pages. Page flows may begin with any page and proceed in the following order. Page flows embody a concept that allows you to create powerful user interfaces tailored to your organization's needs. A page flow encapsulates the unique set of page types in PeopleUpdate and how these page types navigate, or flow, from one page type to another. This concept of pages flowing in an orderly manner is a key concept to understanding how PeopleUpdate works and learning how to configure it to most effectively search and manage your Active Directory data.

Page flows proceed from one page type to another and have one branch. Page flows may begin at any page and you can enable or disable navigation to previous and/or subsequent pages in the page flow. Examine the page flow order by page type below to better understand how PeopleUpdate uses the page flow concept and note the branch from the Detailed Results page type to the Edit and Account Management page types.

Search --> Summary Results --> Detailed Results --> Edit/Account Management

You can configure a task item to start at a certain page by hiding the pages before it and setting the start page load parameters that define the data the page displays when the task item loads. Use this capability to set a task item to load a summary results page that shows a list of all users in a certain department or to display a detailed results page that shows detailed information for the logged-in user’s manager.

You can hide pages in a page flow at the beginning or end of the page flow or you can use a combination of both. For example, you might hide the search page and load the summary results page for a task item. You could then hide the edit and account management pages, which would only allow the user to navigate to the detailed results page.

You can set up interesting task item behavior using a combination of showing certain pages in a page flow and setting up task item load arguments. See the individual task item topics for more information about customizing your configuration using task items.

Understanding Task Item Load Arguments

Through the use of page flows and task item load arguments, task items provide you a powerful mechanism to allow your users to interact with your Active Directory. You can adjust the pages of a page flow for a task item to determine which pages an end user can view, including the start and end page of a page flow. You can also set which data displays when a task item loads for all page types except the search page, allowing you to pre load data into a page when a user views a task item. This capability enables you to create summary reports, detailed object views, and even editable views of object data or account management functionality.

Task item load arguments encapsulate the data that instructs the initial page displaying in a page flow about which data to display. You may have noticed that almost all data that tells a PeopleUpdate what to display is stored in the URL of the page. The data stored in the URL is the key to determining how and what a page in the Search Console displays. When you set up task item load arguments, you are supplying the data the initial page of a page flow needs to display itself. You can use this capability to load a summary results page with a set of search results to load or to display data about a particular object in the directory. The arguments available to load data into allow you to store the initial state of a page you are loading into a task item.

Understanding Page Configuration

PeopleUpdate gives you granular controls over the page display for pages in a task item's page flow. You can employ page flows in myriad ways to present information or allow customized editing capabilities to different user groups within your organization. Page configuration options allow you to show and hide pages within a page flow, assign an alias to a page that dictates what a user sees in the Search Console and set up advanced page configuration values for specialized pages.

Understanding Page Types and Layouts

PeopleUpdate uses page types to differentiate the different classes of pages available to you to build user interfaces that display in the Search Console. Each page type serves a specialized purpose and allows your users to interact with it in a specific manner. You can set the layout for each page type except the account management page to customize the Search Console for your environment.

Search	Initiates a directory query and displays a set of ANDable search fields where all terms entered are combined in a boolean search using AND
SummaryResult	Displays a set of search results that match the user's search query from the Search page
DetailResult	Shows detailed results for one directory object when a user view details for an item on a SummaryResult page
EditPage	Configures which attributes will display on the edit page. In order for an object to be edited it must be on this page. Adding an attribute to the EditPage does not make it an editable attribute and you must ensure the attribute page has an access control list applied that indicates who can edit the attribute.
AccountManagementPage	Allows authorized users to manage a specialized set of account management data

Administration Console: Task Items Configuration Page

The Task Items configuration page allows you to set up task items in PeopleUpdate. Task items appear as left navigation links on the PeopleUpdate Task Nav—the left navigation bar that displays in the Search Console. You can set up different task items to serve different purposes. For example, one task item might have a user search, another might have a computer search and a third might have a printer search. You can add as many task items as you like and task items can differ by tab.

In addition to enabling different searches, task items allow you to load a page type other than a search page when the task item is clicked. You can set up a summary results page to display query results based upon a preset query when a user clicks a task item. You can also set up a detailed results page to display information about a single object in the directory when a user clicks a task item.

Accessing the Task Items Configuration Page

You must have administrative access to the PeopleUpdate Administration Console to modify the task item configuration for a tab.

To navigate to the Task Items page:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Click Task Items in the left navigation bar in the Tab Configuration section.

Managing Task Items

PeopleUpdate v3.0 introduced task items to empower you to create much more than just a single search interface for finding users. You can use task items to provide alternate search pages with different attributes, to link directly to a summary results page displaying a set of pre-configured results or to display a detailed results page for an object in your Active Directory. Check out the Understanding Task Items topic for more information about task items.

Creating Task Items

Task items enable you to divide a tab into different sections by creating page flows. Each page flow has a start and end page and flows logically down a path. You can easily add task items to a tab.

To add a task item to a tab:

1. Navigate to the Administration Console’s Task Items page for the tab in which you want to add the task item.
2. Enter a name for the new task item in the Name field.
3. Click Create New Task Item to create a new task item and add it to the tab.
4. You will see the new task item appear in the Task Item list and you can now move the task item up and down.

Changing Task Item Names

You can change the name of existing task items without impacting how PeopleUpdate works.

To change the name of a task item:

1. Navigate to the Administration Console’s Task Items page for the tab in which you want to update the task item name.
2. Choose Edit for the task item whose name you want to update.
3. Enter the new name and click Save to save your changes or Cancel to revert your changes to the previous value.

Deleting Task Items

You can delete task items and all the related configuration and page data if you no longer need to use the task item.

To delete a task item from a tab:

1. Navigate to the Administration Console's Task Items page for the tab in which you want to delete the task item.
2. Click the X icon next to the task item you want to delete.
3. Click OK to delete the task item and all its related data or Cancel to avoid deleting the task item. Note that you cannot recover deleted task items and the change is permanent.

Changing Task Item Display Order

The order in which task items display on the Task Nav of the Search Console depends on the order in which task items display in the Administration Console. You can change the order in which task items display depending upon the needs of your environment.

To change the order in which task items display on the Task Nav:

1. Navigate to the Administration Console's Task Items page for the tab in which you want to change the order of task items.
2. Click the down arrow next to a task item to move it down in the display order and click the up arrow next to a task item to move it up.

Administration Console: Individual Task Item Configuration Page

The (individual) Task Item configuration page allows you to configure individual task items in PeopleUpdate. You can set properties for each task item independent of other task items using this page.

Accessing the Task Item Configuration Page

You must have administrative access to the PeopleUpdate Administration Console to modify a task item's configuration.

To navigate to the Task Item page:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Expand Task Items in the left navigation bar in the Tab Configuration section.
3. Click the name of the task item you want to configure.

Configuring Task Item Properties

PeopleUpdate v3.0 introduced task items to empower you to create much more than just a single search interface for finding users. You can use task items to provide alternate search pages with different attributes, to link directly to a summary results page displaying a set of pre-configured results or to display a detailed results page for an object in your Active Directory. Check out the Understanding Task Items topic for more information about task items.

Changing the Task Item Name

You can change the name of the task item without impacting how PeopleUpdate works.

To change the name of the task item:

1. Navigate to the Administration Console’s Task Item page for the task item to rename.
2. Enter a new name in the Display Name field.
3. Click Save to save your changes or Cancel to revert your changes to the previous value.

Displaying Task Item Controls

You can customize each task item display to tightly control what your users see on their Search Console. You can show or hide the breadcrumbs, banner and Task Nav for each task item depending on how you’d like to display the task item’s page flow. You can use this capability to control your users’ navigation capabilities by hiding the Task Nav and breadcrumbs or to seamlessly fit a tab into a portal using an HTML <iframe /> element and hiding the application banner for a task item.

To set the visibility of a task item breadcrumbs, banner and Task Nav:

1. Navigate to the Administration Console’s Task Item page for the task item to modify.
2. Check the boxes next to the controls you want to display for the task item.
3. Click Save to save your changes or Cancel to revert your changes to the previous value.

Configuring Advanced Task Item LDAP Filters

Task item LDAP filters allow you to override the tab's default bind path and search filter for individual task items. This powerful capability enables you to bind each task item to a different Active Directory container and change the default filter for the task item.

To configure task item LDAP filters:

1. Navigate to the Administration Console’s Task Item page to set task item load arguments.
2. Set the field values in the Advanced Task Item LDAP Filters section depending on your needs.
3. Click Save to save your changes or Cancel to revert your changes to the previous value.

The individual LDAP filters work in the same way as the tab-level filters you configure on the Directory page except these filters only affect the individual task item.

Search LDAP Bind Path	LDAP bind path to the root of the container you are searching and managing. The path *should* start with LDAP:// (in capital letters as this value is case sensitive) and the path indicates to PeopleUpdate where to bind to the directory to execute searches. Note: If you leave the LDAP Base DN blank it will automatically try to locate a domain controller in the domain using the LDAP://RootDSE bind path, which is the default bind path that binds to the well-known root DSE object.
Group Search LDAP Bind Path	LDAP search path for group searches. This path is used when updating the memberof attribute of user objects.You may need to set the LDAP bind paths for regular and group searches to restrict the bind scope for PeopleUpdate to a particular container or to bind to a particular DC for performing searches and updates.
Search Filter	Specifies the LDAP search filter PeopleUpdate will use when performing every LDAP search. This value is ANDed with the other search criteria passed by users searching the directory. This option enables you to ensure you bind to the correct directory object when searching and helps speed searching by ensuring the search doesn't go through unnecessary directory object containers. Refer to the Directory topic for more information about LDAP search filters.

Configuring Advanced Task Item Context Filters

Task item context filters empower you to set individual task items to load information about a user based upon each user's Active Directory attribute data values. You can use this capability to personalize PeopleUpdate so it will load information relevant to each user. For example, you can set up context filters that will look up a user's office location and then display other users in that location. You could show all users in a user's department or all user's who report to the same manager as a user.

To set up task item context filters, you specify a context that tells PeopleUpdate to base the search on the user's Active Directory data values, a page to load the data into (usually summary or details) and you then set up source-search property pairs that indicate which user source property to use and which search property to query based upon the source property. Finally, you specify a comparison operator (most likely the = operator) to use to filter resulting search values. For example, you could set the source property to *department* and the search property to *department* and then use the = comparison operator. This source-search property would result in querying for all users who have a department value that equals the user's department value. You can even set up searches using different source-search property pairs if you want to extract a source value from the user and then use that value to search for a value in a different attribute.

To configure task item context filters:

1. Navigate to the Administration Console’s Task Item page to set task item load arguments.
2. Set the field values in the Advanced Task Item Context Filters section depending on your needs.
3. Click Save to save your changes or Cancel to revert your changes to the previous value.

The individual context filters allow you to affect the behavior of the task item by specifying.

Context	Set the context to CurrentUser to use the logged-in user's attribute values to find matching results. Setting the Context to None will cause PeopleUpdate to ignore any settings in the Advanced Task Item Context Filters section.
Page to Load	Set the page type to load the resulting search values into. This will typically be a summary result page
Static Search Filter	Default search filter to include with additional search filters specified in the task item context filters. This filter allows you to further restrict the context search and does not read any values from the context.
Search Filters	Add or remove source-search property pairs that restrict the search results for the task item's context filter. For example, set the Source Property to l to look up the current user's City attribute value, set the Search Property to l and then set the Comparison Operator to = to search for other users with matching City

values.

Configuring Advanced Task Item Arguments

Task item arguments allow you to load data into the first showing page (as determined by each page's Show value) of a task item. You will most commonly set the Screen and SummaryFilter, Filter or BindPath argument values to create a set of load arguments. You can get the set of arguments and corresponding values for each by using PeopleUpdate to create a search that returns the search results or detailed data you want to display. You can then copy the argument values from the URL to the names of the arguments in the task item load arguments.

To configure task item arguments:

1. Navigate to the Administration Console’s Task Item page to set task item load arguments.
2. Enter the appropriate arguments to set in the Advanced Task Item Arguments box.
3. Click Save to save your changes or Cancel to revert your changes to the previous value.

The Screen argument values are mapped to integral values to represent different screen types. Use the following values to set the Screen argument.

Screen Type Mappings

- 0 = Search
- 1 = Summary Results
- 2 = Detailed Result
- 3 = Edit
- 4 = Account Management

Administration Console: Page Configuration

You can customize basic and advanced page properties using the Pages configuration page.

Accessing Page Configuration

You must have administrative access to the PeopleUpdate Administration Console to modify page configuration.

To navigate to the Pages management page:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Expand Task Items in the left navigation bar in the Tab Configuration section.
3. Expand the task item containing the page to modify.
4. Click the name of the page you want to configure.

Understanding Page Configuration

PeopleUpdate gives you granular controls over the page display for pages in a task item's page flow. You can employ page flows in myriad ways to present information or allow customized editing capabilities to different user groups within your organization. Page configuration options allow you to show and hide pages within a page flow, assign an alias to a page that dictates what a user sees in the Search Console and set up advanced page configuration values for specialized pages.

Understanding Page Types

PeopleUpdate uses page types to differentiate the different classes of pages available to you to build user interfaces that display in the Search Console. Each page type serves a specialized purpose and allows your users to interact with it in a specific manner.

Search	Initiates a directory query and displays a set of ANDable search fields where all terms entered are combined in a boolean search using AND
SummaryResult	Displays a set of search results that match the user's search query from the Search page
DetailResult	Shows detailed results for one directory object when a user view details for an item on a SummaryResult page
EditPage	Configures which attributes will display on the edit page. In order for an object to be edited it must be on this page. Adding an attribute to the EditPage does not make it an editable attribute and you must ensure the attribute page has an access control list applied that indicates who can edit the attribute.
AccountManagementPage	Allows authorized users to manage a specialized set of account management data

Changing a Page Alias

Set the page alias to determine what page name a user sees for a page in the Search Console.

To change a page alias:

1. Navigate to the Administration Console's Task Nav page for the tab in which you want to set task item load arguments.
2. Click Select next to the task item you want to select and manage.
3. Select the page type for the page whose alias you want to change.
4. Enter the new alias in the Page Alias field.

5. Click Save Changes to update the page configuration.

Showing and Hiding Pages in a Page Flow

You can show and hide pages in a page flow to create a specialized application for a task item. Hiding a page in a page flow modifies how adjacent page in the flow display navigation links like back arrows, details links and breadcrumbs.

To set the display visibility of a page in a page flow:

1. Navigate to the Administration Console’s Task Nav page for the tab in which you want to set task item load arguments.
2. Click Select next to the task item you want to select and manage.
3. Select the page type for the page you want to show or hide.
4. Check the Show box to ensure the page displays and uncheck the Show box to hide the page.
5. Click Save Changes to update the page configuration.

Configuring Advanced Page Options

Each page type can have its own set of special configuration options that determine how the page behaves. Search and account management pages have no special configuration options while other page types have page-specific options that allow you to customize them.

To configure advanced page type options:

1. Navigate to the Administration Console’s Task Nav page for the tab in which you want to set task item load arguments.
2. Click Select next to the task item you want to select and manage.
3. Select the page type for the page whose options you want to configure.
4. Click the down arrow icon on the right side of the header to expand the Advanced Page Configuration section.
5. Make the changes you need to the advanced page options.
6. Click Save Changes to update the page configuration.

Understanding Advanced Page Options by Page Type

Search

The Search page type has no advanced configuration options.

Summary Results

The Summary Results page type contains advanced configuration options that allow you to set how search results display in the Search Console.

Summary Results Sort	Specifies the default sort key for a search that displays the search results in ascending order for the sort key
Allow Results Paging	Choosing Yes enables summary results paging with a small number of results displayed on each page. Choose No to display all search results on the same page.
Results Per Page	If Allow Results Paging is on, this setting mandates the number of results to display on each page
Show Export	Displays an export icon if checked
Details Button Target	Sets the target frame for the details link
Details Button Attributes	Allows you to modify details link behavior by adding custom attributes to the link. Use the following guidelines to add link attributes. This will help ensure your links work properly. You might change this behavior to display a detail results page in

another window

- Use double quotes (") to delimit a link attribute value.

  onclick="SomeActionHere();"

- Use single quotes (') to delimit internal attribute values.

  onclick="MyFunctionCall('Attribute1', 'Attribute2');"

- Separate multiple link attributes with a space and follow the link attribute rules.

  onclick="MyFunctionCall('Attribute1', 'Attribute2');return false;" onmouseover="AnotherFunctionCall();"

- Here's an example to pop up the detail results page in another window.

  onClick="window.open(this.href, 'DetailedResults', 'scrollbars=yes,width=675, height=525, resizable');return false;"

Detailed Results

The Detailed Results page type contains advanced configuration options that allow you to set up Org Nav options and photographs in the Search Console.

Show Return Link	Choose Yes to show the Return to SummaryResult Page link on the DetailResult page. Choose No to hide this link. You might want to hide the link if you enter a details button attribute (using Javascript) that shows the DetailResult page in a separate pop-up window.
Show OrgNav	Choose Yes to show the Org Chart icon on the DetailResult screen. Choose No to hide this icon and all access to the Org Chart on this tab.
Show Photos	Controls whether photos are displayed on the DetailResult screen. PeopleUpdate constructs paths to the photos to display based upon the parameters you set here and you can control the photos size by height and width. For example, if all user photo are stored by your users' account name as a GIF image on the file share \\server\foo\, then you would specify the LDAP attribute "Account Name," base path of "\\server\foo\," and file extension of ".gif." PeopleUpdate cannot retrieve images stored as binary objects inside Active Directory so you must store photos for the DetailResults page on a file system accessible to the web server.
LDAP Attribute	Specifies the LDAP attribute to use to build a path to a user's photo
Base Path	Indicates the HTTP or UNC path to the photo file system
File Extension	Sets the file extension for the photo
Photo Width	Sets the width of the photo and you can set this to 0 to use the default photo size of the source image
Photo Height	Sets the height of the photo and you can set this to 0 to use the default photo size of the source image
Verify Photo Exists	Forces a check to ensure the photo exists at the path and displays the photo configured by the No Photo Available Path if the photo does not exist
No Photo Available Path	Allows you to set a default path to a photo to display if Verify Photo Exists is checked and a user's photo is not available

Edit

The Edit page type contains advanced configuration options that allow you to set how DN and group searches display in the Search Console.

Search DN Page Width	Controls the width of the pop-up window that is opened when searching and updating values stored in distinguished name format in Active Directory
Search DN	Controls the height of the pop-up window that is opened when searching and

Page Height updating values stored in distinguished name format in Active Directory

Account Management

The Account Management page type has no advanced configuration options.

Administration Console: Page Layout Configuration Page

The Page Layout configuration page allows you to set up a customized user interface for your Search Console.

Accessing the Page Layout Configuration Page

You must have administrative access to the PeopleUpdate Administration Console to modify page layouts.

To navigate to the Page Layout configuration page:

1. Log in to the Administration Console. Click here for more information about logging into the Administration Console.
2. Expand Task Items in the left navigation bar in the Tab Configuration section.
3. Expand the task item containing the page to modify.
4. Expand the name of the page you want to configure and click Page Layout.

Laying Out Pages

Use the Page Layout Editor to configure the display of each page in PeopleUpdate. The cells that display in the row and column layouts allow you to pinpoint exactly where you want an attribute to display on a page.

To change rows and columns in a page layout:

1. Navigate to the Administration Console’s Task Nav page for the tab in which you want to change rows and columns.
2. Click Select next to the task item you want to select and manage.
3. Select the page type for the page whose rows and columns you want to configure.
4. Click the up arrow icon next to the Rows and Columns labels in the Page Layout Editor section to add a row or column. Conversely, click the down arrow icon to remove the bottom row or column on the right. All attributes displayed in a row or column are removed when you remove a row or column.

   Note: All page layout changes are immediately saved in the configuration and you do not need to click Save Page Changes to change your page layout configuration.

Adding and Removing Attributes to and from Pages

You can add and remove attributes to display in a page. The Available Attributes section allows you to add attributes you've defined in on the Attributes configuration page of your tab configuration to the display cells in the page layout. You can add zero, one or more attributes to each display cell. The interface also allows you to easily move attributes around a cell and to remove attributes from a cell.

To add attributes to a page layout:

1. Navigate to the Administration Console’s Task Nav page for the tab in which you want to change rows and columns.
2. Click Select next to the task item you want to select and manage.
3. Select the page type for the page whose attributes you want to add.
4. Select an attribute to add to the screen layout using the list.
5. Select a Row and Column to which to add the attribute. You can always move the attribute to another cell after you add it if you select an incorrect cell initially.
6. Click Add Attribute to add the attribute to the selected cell.
7. If so desired, you can move attributes around the screen layout using the arrow keys next to each display cell. In addition, you can remove an attribute from a cell.

To remove attributes from a page layout:

1. Navigate to the Administration Console’s Task Nav page for the tab in which you want to change rows and columns.

2. Click Select next to the task item you want to select and manage.
3. Select the page type for the page whose attributes you want to remove.
4. Click the name of the attribute to remove in the cell in the Page Layout Editor where the attribute resides.
5. Click the X icon on the lower-right side of the cell to remove the cell from the page layout.

To move attributes among cells in a page layout:

1. Navigate to the Administration Console’s Task Nav page for the tab in which you want to change rows and columns.
2. Click Select next to the task item you want to select and manage.
3. Select the page type for the page whose attributes you want to remove.
4. Click the name of the attribute to remove in the cell in the Page Layout Editor where the attribute resides.
5. Click the up, down, left or right arrow icon next to the cell to move the selected attribute to another cell in the page layout.

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