Directify® Installation Guide with Release Notes

Directory Wizards Inc

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Directify, previously known as Profiler, is a web based interface for directory management which enables the end user, or another designee, the ability to update certain administrator-defined attributes. Originally designed for use with Active Directory, functionality was expanded so that Directify will work with **any** LDAP directory.

This is a full release for Directify v7.0. This release supersedes all previous releases.

Please see the Deliverable Summary for information about:

- Supported Directories
- Updated Features and Functionality.

To learn more about using Directify to its full potential, please refer to the Directify Administrator's Guide.

Supported Platforms and Connectivity Requirements

- Directify for Windows will run on any Windows server 2007 or better. Directify for Linux will run on any Linux system. Please not that Directify is 64-bit and must run on a 64 bit OS.
- There is no need to load Directify on your LDAP directory server, however you may if desired.
- Directify must be installed on a web server (i.e. IIS, Apache, etc.) for full functionality; it can also be used with the included dirweb web server utility but that will limit directify.cgi usage to that single server.
- The Directify server must be able to connect to the target directory server over the LDAP port specific in the connection's configuration. Default LDAP port is 389.
- Javascript is required to run Directify.
- Please use Internet Explorer 10, Firefox 6, or Chrome 6 or newer.
- Please see complete up-to-date system requirements in our knowledge base.

Licensing Requirements

- **New User:** You will initially install Directify using a 15-day temporary key. Following completion of purchase, you will receive a permanent license key.
- **Existing Directify User:** Any new installtion of the software, including upgrade, requires a new license key. You will receive a 15-day temporary key with download for installation. Once Directify is installed, you will have access to the About tab with the new Serial Number. Send a request with that Serial Number to keys@dirwiz.com to update your permanent license key.

Inquiries about Directify

- Contact support@dirwiz.com for technical assistance.
- Contact sales@dirwiz.com for pricing and purchase inquiries.
- Contact keys@dirwiz.com for temporary and permanent keys.

This release of Directify is available for download at dirwiz.us/download. Upon request, you will receive an automated email which includes a link to download the software along with a 15 day temporary license key.

Depending on which type of user you are, you'll follow one of the following instructions. Click on your user type for installation instructions:

- First Time Directify-v7.0 for Windows User
- First Time Directify-v7.0 for Linux User
- Existing Profiler-v5.0 or earlier User
- Existing Directify-v6.x User

For installation support, please contact support@dirwiz.com.

1. Download the latest software at dirwiz.us/download.
2. Execute the Directify install program and follow the prompts for installation.
   - The default installation directory is c:\directify-v# (where # refers to the current version number)
   - You may install to any directory name provided the underlying directory structure names remain as installed.
3. Refer to the Web Server Configuration white paper for further instruction.
4. Once the web server configuration is complete and you are able to access the Directify Configuration View (config.cgi), apply your temporary license key on the About tab and click Save.

1. Download the latest software at dirwiz.us/download.
2. Extract the file via Terminal and execute the install program. Follow prompts for installation.
   - cd to the proper folder. The default installation directory is you Download folder and will read Directify-v# (where # refers to the current version number).
   - You may install to any location by moving the installer files or entereing a new install path providing the underlying structure names remain the same.
   - Run the file.
   - you will have to hit Enter to scroll through and accept the full license agreement. To accept, type yes when prompted.
   - Leave the terminal window open.
3. Review the Web Server Configuration White Paper for further instruction.
4. Once you are able to access the Directify Configuration View (config.cgi), apply your temporary license key on the About tab and click Save.

Directify v6 was completely rewritten from scratch! This more stable platform allowed us to expand support for more directory types in addition to the original Active Direcctory, and will enable new features and functionality into the future.

Therefore, if you are running any version previous to v6.0, you will need to install Drectify v7.0 to a new directory and configure it anew. In fact, we strongly recommend a fresh installation with each upgrade to ensure you get the benefit of all fixed and enhancements.

1. Back up your current installation by zipping the entire install directory.
2. Download the latest software here: dirwiz.us/download
3. Execute the Directify install program and follow prompts for installation.
    - The default installation directory is c:\directify-v# (where # refers to the current version number)
    - You may install to any directory name provided the underlying directory structure names remain as installed.
    - Please **DO NOT** install directly over any previous version of Profiler or Directify. A fresh installation is **required**.
    - Please **DO NOT** move any configuration files from version of Profiler older than v5. You will need to configure Directify from scratch. Please refer to your previous installation for guidance but be aware that the interface has changed quite a bit.
4. You will need:
    - a new license key. Contact keys@dirwiz.com and include your Serial numbers (both old and new) as well as the hostname used for your previous installation. We don't need a hostname for this new version. *to update your Web Server Configuration. You will need to configure a new virtual directory. Refresh your memory by reviewing our Web Server Configuration white paper.

Each Directify installation is licensed to run on a specific server identified by serial number found on the About tab on the Directify Configuration View (config.cgi).

Licensing rules apply when upgrading Directify. The serial number is unique for every install, so you'll need a new license key. To obtain one, contact keys@dirwiz.com with the original licensed serial number (prior to upgrade) and the new serial number as it appears on the About tab on the Directify Configuration View (config.cgi).

To get started with your upgrade:

1. Back up your current installation by zipping the entire install directory.

2. Download the latest software here: dirwiz.us/download

3. Execute the Directify install program and follow prompts for installation.

   - The default installation directory is c:\directify-v# (where # refers to the current version number)
   - You may install to any directory name provided the underlying directory structure names remain as installed.
   - Please **DO NOT** install directly over any previous version of Profiler or Directify. A fresh installation is **required**.

4. Prior to opening your new Directify installation, copy the following files from your previous installation and paste them into the same location in the new installation:

   \Directify\Data\Forms \Directify\Data*.txt (excluding key.txt as you will need a new key)

5. You will need:

   - a new license key. Contact keys@dirwiz.com and include your Serial numbers (both old and new) as well as the hostname used for your previous installation. We don't need a hostname for this new version. *to update your Web Server Configuration. You will need to configure a new virtual directory. Refresh your memory by reviewing our Web Server Configuration white paper. You will need to change the location of the virtual directory.

You will ultimately need to configure a web server to work with Directify so that end users are able to access the Directify End User View (directify.cgi). More information on doing so, as well as using our Dirweb micro web server utility for a quick start to configuration, follows.

Dirweb

Directify is web-based, so you will ultimately need a web server/browser to use Directify. For a quick start, however, while you are beginning configuration, you can opt to use dirweb, a licensed micro web server utility included for your convenience.

Dirweb for Windows

After installation of Directify: * Navigate to the folder where Directify is installed. * Locate the bin folder and double click. * Once inside the folder, double-click dirweb.exe

IMPORTANT NOTE: *While you can use dirweb for a quick start to begin configuration of the Directify Configuration View (config.cgi), you will need to configure a web server for full functionality.*

Once dirweb is executed you will see a message that reads:

```
DirWeb by Directory Wizards, Inc.
HTTP Server listening on 127.0.0.1, tcp port 8080
Press Return to close this server.
```

Leave your terminal window open. Your browser should automatically open to localhost:8080/directify.cgi to access the Directify End User View. If it does not, please manually open your browser and go to that location yourself.

To get to the Directify Configuration View (config.cgi) please go to localhost:8080/config.cgi.

You will ultimately need to configure a web server to work with Directify such as IIS. More information below.

Dirweb for Linux

From terminal, cd into the //bin directory to execute dirweb. Once in the //bin directory, execute:

```
./dirweb
```

Once executed, you will see a message that reads:

```
DirWeb by Directory Wizards, Inc.
HTTP Server listening on 127.0.0.1, tcp port 8080
Press Return to close this server.
```

Leave your terminal window open. Your browser should automatically open to localhost:8080/directify.cgi to access the Directify End User View. If it does not, please manually open your browser and go to that location yourself.

To get to the Directify Configuration View (config.cgi) please go to localhost:8080/config.cgi.

You will ultimately need to configure a web server to work with Directify such as Apache or NginX. Directions for these web servers are forthcoming. If you need assistance, please contact support@dirwiz.com.

Internet Information Services (IIS)

IIS configuration is similar for all Directory Wizards products. Please see configuration instructions for IIS 8.5 and 10 in our Web Server Configuration white paper found on our Directify documentation page.

IMPORTANT NOTE: *We strongly recommend that you use SSL security on your web server. Please refer to your web server documentation for detailed information on configuring the SSL options.*

Once you can access the Directify Configuration View (config.cgi) via dirweb or IIS, there are a few steps you will need to take before it is fully functional. These initial configuration steps are simply to get you started; please find complete details in the Administrator's Guide.

The first time you access the Directify Configuration view via config.cgi you will immediately see an alert, asking for a configuration choice. You may select *Active Directory - Exchange, Active Directory - LDS (Lightweight Directory Services), Active Directory - No Exchange,* or *Other.*

The Active Directory templates will populate common defaults for Active Directory configuration. If you select Other, you will use Directify without any populated defaults and can configure the software to work with any LDAP directory.

Once you have selected an option, you will see a pop-up that says *Initial Configuration completed. Click OK to continue.*

Until you have configured LDAP directory information, you will receive an alert that reads *LDAP configuration missing. Please configure LDAP before proceeding.*

To proceed, simply click OK.

Once the pop-up is gone, you will be able to enter your key information on the About tab or navigate to the LDAP tab to input directory information.

License Information on the About tab

The About tab provides information about your system (as it relates to the software), the software itself, and your licensing. For more information on the About tab, refer to our Administrator's Guide.

To get started using Directify, enter the temporary key you received with your software download into the box in the lower left of the tab. Once you Save, you will see additional license information in the Key Info box in the lower right of the tab.

If you would like to request a permanent key, you're licensing purchase must be complete. Provide the Serial Number found on this tab to keys@dirwiz.com.

Schema Information on the LDAP tab

Before any other tabs are available for configuration, you must add the directory information to the LDAP tab.

Once you have successfully downloaded the directory schema, you are able to access the other tabs available in the Directify Configuration View (config.cgi).

Please see the Administrator's Guide to continue your configuration.

Supported Directories

This release supports discovery and syncing of the following directory types, out of the box:

- Pre-configured for Active Directory (AD) 2007 or better, with or without Exchange, as well as Active Directory Lightweight Directory Services (AD LDS)
- Also supports **ANY** LDAP directory

Features and Functionality

- Windows and Linux version available
- AES256 encryption support
- Web-enabled so you can administrate from any location using a browser
- Search, view, and edit person and group objects including group membership editing
- Automated creation of mail forwarding contacts
- Allow update by managers, assistants and other appointed Admins
- Email notification of changes
- Customize for any LDAP directory - and we mean **ANY**!

Directify v7.0

- Add - ability to log (debug) ldif data of search objects as well as edit/view object
- Add - config.txt item to restrict all config.cgi to 127.0.0.1 (configlock=yes)
- Fix - bug where invalid JSON was returned if no search results were found
- Add - new config.txt item which bypasses the login screen (and session data) if SSO is configured. (ssodirect=yes)
- Add - new items to handle SSO logins: ssoheader This is the HTTP header with the user ID from SSO ssoattrib This is the LDAP attrib used to search for account
- Add - pageid & pagepw config.txt items to customize login page field labels
- Add - extra alert if the search size limit is met or exceeded
- Add - upper limits on search to max 250
- Add - new datatables with jquery ui theme support
- Fix - cleaned up where member searches now work correctly
- Fix - much improved efficient json search results.
- Add - hard-coded defaults for both col labels & col names
- Add - search column label support in json results
- Add - new callback search routines no longer stores resultset in memory
- Fix - modified entry_to_json to optionally return single values
- Fix - converted search results into more of an Entry
- Add - customized search results attribs
- Fix - bug where adminuser setting defaulted to "yes" if it's not set in config.txt. (Now defaults to "no")
- Add - login by attribute feature. Example: loginattrib=mail
- Add - ability to change jquery UI theme via config.txt. Default is redmond (syntax: uitheme=blitzer)
- Fix - crash occurring if object class was not found in objclass.txt
- Fix - issue where the form editor will ignore all objectclasses not found in schema (Rather than fail with an error)
- Temporarily removed fix_entry for AD wierdness
- Fix - bug where syslog levels were not correct in config
- Add - ldapsearch_one debugging to syslog
- Add - new "admin edit" option for edit level permissions
- Fix - possible issue with null-terminated string in entry handling
- Add - support for apple mac builds
- Fix - issue with embedding of javascript
- More fixes for date/timestamps/
- Add - request key button to config UI
- Fix - time_t issue with linux.
- Fix - issue with time_t conversion with windows clients.
- Add - folded javascript directly into html for speed improvement on load and to resolve caching issues.
- Add - converted eula.txt from utf-8 to ASCII
- Add - support for syntax 1.2.840.113556.1.4.906 This includes some attributes like "accountexpire"
- Add - generalizedtime syntax support
- Fix - removed another debugging window for form/save in config
- Fix - placement of pre-defined values popup window
- Fix - lots of cleanup with all sortable tables (search, forms etc)
- Fix - removed LDAP Port from UI
- Fix - updated UI to allow for ldap starttls
- Add - code for ldap starttls as well as multi-fail over hosts (comma separated)
- Add - dirwiz icons to windows build installer
- Fix - issue with UI administrators add/delete
- Fix - corruption of config.cgi after using a backslash in the login prefix
- Fix - issue where ldap port did not default to 389
- Fix - updated UI dialog positions to make sure they are centered on window
- Fix - updated build scripts with new code signing
- Fix - updated duktape to latest version and removed legacy code

- Fix - cleaned a bit of of the logic of form loading
- Add - UI improvements to SMTP
- Fix - to win build script
- Fix - leading underscore issue
- Fix - updated for mingw32
- Fix - updates to build environment for code signing
- Add - changed "mydn" from shortdn to just the rdn of the object. (upper left of directify.cgi)
- Fix - updated CGI calls with new library
- Fix - updated build scripts with new xmpp params
- Fix - crashes specific to windows builds
- Fix - two issues where an trailing empty text fields caused issues and possibly crashes
- Fix - did some general clean up of status messages and alerts for debugging
- Add - "Nothing Found" to admin search results in config
- Fix - issue with form deletions failing to work
- Fix - removed all references to "Profiler" (old name)
- Fix - removed debugging code from config interface
- Fix - where text field followed by an attrib in the forms editor caused a crash
- Fix - updated code to handle new syslog API
- Fix - updated defaults for config with new searchadmin queries
- Fix - bug where save button was showing up even if user was not an "admin" of that object
- Add - groups are now allowed as "Directify Admins". Any member of those groups is valid. In order for this to work in existing installs change the following in data/config.txt: searchadmin=(&(|(objectclass=group)(objectclass=user)) (anr=%s)) *** The "Domain Users" group will NOT work with this feature***
- Fix - issue with ldif where data starting with _ was inadvertantly base64 encoded
- Add - Password Reset function
- Fix - cleaned up admin screen a bit and added extra security for password reset button and the use of a password reset function
- Fix - removed extra lines from XMPP notification
- Fix - removed dirlog (obsolete)
- Fix - simplified XMPP notifications on build.
- Add - the street address attribute in AD can now be defined as a multivalued field
- Fix - removed dirlog from build (non-functional)
- Fix - updated to use Mailer's shared libraries instead of custom SMTP calls per app
- Fix - updated setup to clean up libcurl to only do smtp
- Fix - issue with saving forms in the incorrect format
- Fix - some syntax errors in entry processing
- Fix - issues with handling null values in JSON data
- Add - openldap 2.4.44
- Fix - updated versions of curl, openldap & openssl
- Fix - problem handling group membership > 1500 records in AD
- Add - custom forms for editing
- Add - extra json call of '/key' to both config.cgi & directify.cgi to gather key environment data
- Moved directify eula from rtf to txt
- Add - functionality to limit search box to user's OU. Located under search tab in config

Directify v6.3

- Add - new logo and background image added to header of interface
- Add #425 - ability to apply filter processing on any single valued attribute
- Fix - syntax tab functionality replaced by manually edited file. Syntax.txt file is obsolete, replaced by schema-override.txt
- Fix #545 - pressing enter on the admin search field in config.cgi led to unintended results
- Fix #546 - issue where a member could not be added to a group if membership is already empty
- Fix #579 - added macro/auto fill support
- Add - Mod updates to LDAP will only process if there is an actual change to be made rather than just push full mods

- Add - updated SMTP notification email to include remote IP address and user logged in.
- Add - notification email now identifies: object changed, name/ip of user who made change as well as a list of attributes that were changed. (reference 26464)

Directify v6.2

- Add - renamed product from Profiler to Directify
- Fix - issue with button to remove admin
- Add #534 - support for default AD LDS install via template
- Fix #426 - issue with data saving/loading in the admins tab in config.cgi
- Fix - changed layout of admin tab to make permissions more clear
- Add #525 - made form editor titles more descriptive with type of form and form name
- Add #526 - made delete form dialog confirmation more descriptive
- Add #527 - included "are you sure" dialog when closing the form editor (if changes were made)
- Add - included default Contact create form with minimum attributes for Exchange to recognize it
- Add - after creation the edit form is loaded for newly created object
- Add - included support to allow Profiler Admins to CREATE contacts
- Fix - issue where UI broke with text field in form editor
- Add - if form is deleted and recreated, Profiler will default-load the original installed form for the system type instead of a blank form
- Add - option to blank out OU for cleaning as well as the OU for creation of objects
- Add - extra check so that auto-clean will only run if a mailforward attrib is used
- Add - merged syslog & SMTP tabs into a single notify tab
- Add - extra option to force all created objects into an OU in the first level of the LDAP tree
- Add #518 - syntax override defaults to both Exchange & Non-Exchange configurations
- Fix #514 - issues with foreign characters in the interface (including DN's)
- Fix #513 - issue when trying to view object with an ampersand (&) in the DN
- Add #419 & #511 - updated Directify to use multi-valued multi-attribute admin manager attribute
- Add - option in forward OU for "blank" to disable OU forwarding
- Add #489 - ability to change page title as well as the text below the login button
- Add #490 - option to set session timeout to 1. By default 5 is used
- Add #493 - Dropdown fields can now be used for single value attributes of a directory string syntax
- Add #486 - check box to allow enable/disable search in Directify UI
- Add #426 - restrict Directify admins to only update their own OU OR their own OU and sub OU's
- Add - set Active Directory .jpeg limits to default to 102400 matching the limit on thumbnailphoto found in schema
- Add - updated openssl to 1.0.1g to mitigate Heartbleed bug

Profiler v6.1

- Add #466 - for Contact Creation, both Mail and Proxyaddresses are now searched
- Add #464 - enhanced default search settings to use "starts with"
- Fix #464 - on creation of mail forwarding contacts, fixed issue with unescaped character in *exchange-mailforward attribute name. Changed to _exchange-mailforward
- Add #462 - for simplicity, enhanced the OU list for auto-created contacts for forwarding to only show the first level and will not show sub OU's. The OU we use must be an OU in the root of the tree
- Fix #461 - cleaned up JPEG where editable options are not shown if set to read-only
- Add #460 - included feature to allow setting a prefix and/or suffix to login id (general tab)
- Add #459 - enhanced auto-create of mail forward contacts so there is the option to hide, or not hide them from the GAL
- Add #458 - included setting to allow/disallow user to edit their own object
- Add - updated installer for default country.txt syntax
- Add - multi-select fields now supported