DIRECTIFY®

v6.3

Release Notes

and

Install Guide

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Introduction: Release v6.3

Information about Release v6.3

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 Active Directory, functionality has been expanded so that Directify will work with <u>any</u> LDAP directory.

This is a full release for Directify v6.3. This release supersedes all previous releases.

Please see the <u>Deliverable Summary</u> for information about:

- Supported Directories
- Updated Features and Functionality

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

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.
- 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 server.
- The Directify server must be able to connect to the target directory servers over the LDAP ports specified in each connection's configuration setup (i.e. default LDAP is port 389)
- Javascript is required to run Directify.
- 64 bit Directify—must run on a 64 bit OS
- Please use Internet Explorer 10, Firefox 6 or Chrome 6 or newer.
- Please see complete up-to-date requirements in our <u>knowledge base.</u>

Licensing Requirements

- **New User:** You will initially install Directify using a 15 day temporary key. Following

the purchase of Directify, you will receive a permanent license key.

- **Existing Directify User:** Any new installation 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 Install Serial Number. Send a request with the Install Serial Number to obtain a permanent key.

Please send all key requests to keys@dirwiz.com.

Licensing and Sales Inquiries

- 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.

Installation and Upgrade Instructions

This release of Directify is available for download at www.dirwiz.com/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 instruction:

First Time Directify-v6.3 for Windows User

First Time Directify-v6.3 for Linux User

Existing Profiler v5 or earlier User – *For users currently running a previous Profiler version earlier than version 5.*

Existing Directify v6 through v6.2 User – *For users currently running Directify or later.*

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

Installation/Upgrade by User Type

First Time User – Windows

1. Download the latest software at www.dirwiz.com/download.

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

    a) The default installation directory is C:\Directify-v# ("#" refers to the current version number and will be followed by said version number).

    b) You may install to any directory name provided the underlying directory structure names remain as installed.

3. Skip to the Web Server Configuration section 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.

First Time User – Linux

1. Download the latest software at www.dirwiz.com/download.

2. Extract the file via Terminal and execute the install program. Follow the prompts for installation:

   a) cd to the proper folder. The default installation directory is your Download folder and will read Directify-v# ("# " refers to the current version number and will be followed by said version number).

   b) You may install to any location by moving the installer files or entering a new install path after step c below, provided the underlying directory structure names remain as installed.

   c) Run the file.

   d) You will have to hit Enter to scroll through and accept the full license agreement. To accept, type yes when prompted.

   e) Leave the terminal window open.

3. Skip to the Web Server Configuration section for further instruction on how to use the included dirweb utility.

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.

Upgrade from Profiler v5 or older

Directify v6 was completely rewritten from scratch! The new, more stable platform has allowed us to expand support for more directories in addition to Active Directory, and will enable new features and functionality in the future.

Therefore, if you are running any version previous to v6.0, you will need to install Directify v6.2 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 fixes and enhancements.

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

2. Download the latest software, www.dirwiz.com/download.

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

   a) The default installation directory is C:\Directify-v# ("#" refers to the current version number).

   b) You may install to any directory name provided the underlying directory structure names remain as installed.

   c) Please **DO NOT** install directly over any previous version of Directify. A fresh installation is **required**.

   d) Please **DO NOT** move any configuration files from versions 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) a new license key. Contact keys@dirwiz.com and include your new Serial Numbers as well as the hostname used for your previous installation.

   b) to update your Web Server Configuration. You will need to configure a new virtual directory. Refresh your memory by reviewing our white paper regarding IIS configuration located in our Directify documentation section.

Upgrade from Directify v6.0 or later

Each Directify installation is licensed to run on a specific server identified by the serial number found on the Directify About Tab on the Directify MUI**.**

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. Let us know the original licensed serial number (prior to upgrading) and the new serial number as it appears on the Directify About tab. See the Licensing section for more information.

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

2. Download the latest software, www.dirwiz.com/download.

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

   a) The default installation directory is C:\Directify-v# ("#" refers to the current version number).

   b) You may install to any directory name provided the underlying directory structure names remain as installed.

   c) Please DO NOT install directly over any previous version of Profiler or Directify. A fresh installation is <u>required</u>.

   d) 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 (or Profiler)\Data\Forms
   \Directify (or Profiler)\Data*.txt (excluding key.txt as you will need to request a new key)

4. You **<u>will</u>** need:

   a) a new license key. Contact keys@dirwiz.com and include both your previous and new Install Serial Numbers.

   b) to update your Web Server Configuration. Refresh your memory by reviewing our white paper regarding Web Server Configuration located in our Directify documentation section. You will need to change the location of the directory that your web server points to.

Web Server Configuration

Dirweb for Windows

Directify is web-based, so you will need a web server / browser to use the Directify Manager. For a quick start, you can opt to use Dirweb, which is a licensed micro web server and included for your convenience:

> \bin\dirweb.exe

After install/upgrade of Directify:

1. Navigate to the folder where Directify has been installed.

2. Locate the bin folder and double click.

3. Once inside the folder, double click dirweb.exe.

IMPORTANT NOTE: *While you can use dirweb for a quick start to begin configuration, you will need to configure IIS 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.

Dirweb for Linux

Directify is web-based, so you will need a web server/browser to use the Directify Manager. For a quick start, you can opt to temporarily use Dirweb, a licensed micro web server included for your convenience:

/bin/dirweb

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. To get to the Directify Configuration View (config.cgi) please go to localhost:8080/config.cgi. If it does not, please manually open your browser and go to that location yourself.

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

Internet Information Services (IIS)

IIS configuration is similar for all of Directory Wizards products. Please see configuration instructions for IIS 6, 7 or 8 on our website at http://www.dirwiz.com/Directify/doc.

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.*

Getting Started

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 Directify 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 pre-populate common defaults for Active Directory configuration. If you select Other, you will use Directify without any pre-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'll need to 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 in config.cgi. To continue with your configuration, please refer to the Directify Administrator's Guide section on the LDAP tab for complete details.

Deliverable Summary

Supported Directories

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

- Pre-configured for: AD 2007 or better, with or without Exchange, and AD LDS
- Also supports ANY LDAP directory

Features and Functionality

- Windows and Linux versions 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

Fixes and Enhancements

Directify v6.3

- 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. Notification email now identifies: 0bject changed, name/ip of user who made change as well as a list of attributes that were changed. (reference Ticket 26464)

Directify v6.2

- 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