



Instant HR Auditor Installation Guide



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HR AUDITOR INSTALLATION GUIDE

SYSTEM REQUIREMENTS

Windows Server 2008R2® -or- Windows Server 2012®

Application cannot be installed on the same server hosting Lync®. Application will conflict with Lync® settings

Read access to SQL Server LCSLogs

The application supports both SQL and Windows server authentication options.

Access to Windows Active Directory

For optimal performance, HR Auditor and SQL Server LCSLogs should be in the same physical site.

SERVER PREPARATION

HR Auditor requires some roles services to be installed before our application can be installed.

HR Auditor requires:

- IIS 6 Compatibility mode
- Windows Authentication (in IIS security settings)
- ASP.NET

We have provided the appropriate PowerShell commands to enable these role services.

For Windows Server 2008R2®, open the "Server2008R2.txt" file, and copy or type the command into PowerShell.

For Windows Server 2012®, open the "Server2012.txt" file, and copy or type the command into PowerShell.

If you don't wish to run the PowerShell commands, these instructions will guide you through the installation of the required role services using the Windows GUI.

ENABLE ROLE SERVICES IN WINDOWS SERVER 2008 R2:

- 1. Start the Server Manager application as an administrator.
- 2. Select Roles from the directory tree.
- 3. Select Web Server, and scroll down to Role Services.

server Manager (VAVSQA)	Web Server (IIS)		
Configuration Configuration Configuration Storage	Provides a reliable, manageable, and	scalable Web application infrastructure.	
	Role Service	S A Remove Role Services	
	👆 Web Server	Ir	
	Common HTTP Features	Ir	
	📩 Static Content	Ir	
	befault Document	Ir	
	Directory Browsing	Ir	
		Ir	
	HTTP Redirection	N	
	WebDAV Publishing	N	
	Application Development	N	
	ASP.NET	N	
	.NET Extensibility	N	
	ASP	N	
	CGI	N	
	ISAPI Extensions	N	
	ISAPI Filters	N	-
	💫 Last Refresh: Today at 9:26 AM Configure re	efresh	
	,		

Figure 1: Adding Role Services (Web Server (IIS))

- 4. Click on the option to Add role services.
 - 4.1. Scroll to Application Development and select **ASP.NET**. Accept the additional required components.

dd Role Services Select Rol	e Services	Ĕ
Role Services Confirmation	Select the role services to install for Web Server (IIS): Role services:	Description:
Progress Results	Default Document (Installed) Directory Browsing (Installed) UritTP Errors (Installed) HTTP Errors (Installed) HTTP Redirection WebDAV Publishing Application Development Asp.NET ASP.NET GI GI GI SAPI Extensions JISAPI Extensions JISAPI Extensions Server Side Includes	Windows authentication is a low cost windows authentication solution for internal Web sites. This authentication scheme allows administrators in a Windows domain into take advantage of the domain into take advantage of the domain intrastructure for authenticating users. Do not use Windows authentication if users who must be authenticated access your Web site from behind firewalls and proxy servers.

Figure 2: Select ASP.NET

Add role services required You cannot install ASP.NET unless the re-	
Role Services:	Description:
Web Server (IIS) Web Server Poplication Development ISAPI Filters ISAPI Extensions .NET Extensibility	Web Server (IIS) provides a reliable, manageable, and scalable Web application infrastructure.
	Add Required Role Services Cancel

Figure 3: Select required role services for ASP.NET

4.2. Scroll to **Security** and select **Windows Authentication**.

Select Role	eServices	
Role Services Confirmation	Select the role services to install for Web Server (IIS): Role services: Description:	
Progress Results	Logging Tods Logging Tods Logging Tods Logging Tods Logging Control (Instaled) Tracing Custom Logging Custom Logg	ion for internal nentication scheme s in a Windows antage of the re for s. Do not use ation if users who red access your

Figure 4: Selecting Windows Authentication

- 4.3. Scroll down until you find IIS6 Compatibility Mode.
- 4.4. Select all the services in the IIS6 Compatibility Mode tree.

Role Services	Select the role services to install for Web Server (IIS):	
Confirmation	Role services:	Description:
Progress	IS Clerk Certificate Mapping Authentication IPU, Authorization Pand Damain Restrictions Pandomain Restrinde Pandomain R	IIIS 6 Management Compatibility for your applications and scripts that use the two IIS 2619, Admin Base Object (Applications and scripts that use the two IIS 2619, Admin Base Object (Applications) (ACSI), Niestony Service (Applications) (
	More about role services	

Figure 5: Selecting IIS 6 Management Compatibility

- 5. Click **Next** in the bottom right corner once all necessary services have been selected.
- 6. Click **Install** to install these services to the server.

le Services	• Solution for the sector of sectors of the sector of the
onfirmation	To install the following roles, role services, or features, click Install.
ogress	() 2 informational messages below
sults	① This server might need to be restarted after the installation completes.
	🔿 Web Server (IIS)
	(i) Find out more about Windows System Resource Manager (WSRM) and how it can help optimize CPU usage
	Web Server ASP.NeT ASP.NeT JSAFE Extensibility ISAFE Extensions ISAFE Extensions Security Windows Authentication Management Tools IS5 Metabase Compability IS5 Metabase Compability IS5 Metabase Compability IS5 Metabase Compability IS5 Security Windows Authentication Management Console Print.e-mail.or save this information

Figure 6: Install selected role services

7. Click **Close** once installation of the selected services is completed.

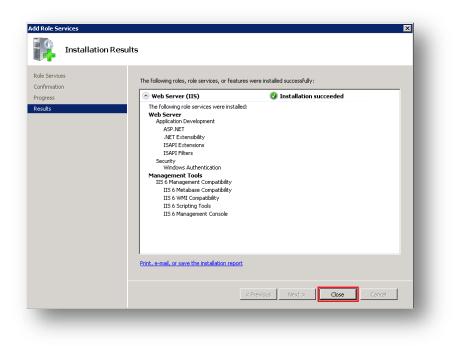


Figure 7: Installation of role services complete

8. You are now ready to begin installation of HR Auditor.

ENABLE ROLE SERVICES IN WINDOWS SERVER 2012:

- 1. Open the Server Manager application.
- 2. Select Add Roles and Features from the Manage option.

3	Server Mar	ager		_ D X
🗲 🗧 🛯 • • Local Se	rver	• 🕲 I 🧗	Manage Tools	View Help
	Consultaneous	AV50A2012	Add Roles and F	
Dashboard	Computer name Domain	instant.local	Remove Roles ar	nd Features
	Domain	Instantiocal	Add Servers	
Local Server			Create Server Gr	oup
All Servers			Server Manager	Properties
File and Storage Services ▷	Windows Firewall	Domain: On		windows
- The and storage services v	Remote management	Enabled		Custome
	Remote Desktop	Enabled		IE Enhand
	NIC Teaming	Disabled		Time zon
	Ethernet	192.168.1.104, IPv6 e	enabled	Product I
	Operating system version	Microsoft Windows	Server 2012 Datacenter	Processo
	Hardware information	Microsoft Corporatio	on Virtual Machine	Installed
				Total disk
	< III			>
	EVENTS		_	
	All events 0 total		Ľ	TASKS 🔻

Figure 8: Add Roles and Features

- 3. Select the option for Role-based or feature-based installation and click Next.
- 4. Select the appropriate server and click Next.

5. Add Web Server (IIS), and accept the Roles and Features prompted by the wizard. Click Next.

Sefore You Beain	Select one or more roles to install on the selected server.		<u> </u>	Add Roles and Features Wizard
nstallation Type erver Selection erver Rides eatures Keb Server Role (IIS) Role Services Confirmation essuits	Pales	Description Web Server (2019) provide a mobile, regulation winathucture.	The follo have to b 4 Web	atures that are required for Web Server (IIS)? wing tools are required to manage this feature, but do not e installed on the same server. Server (IIS) Anagement Tools [Tools] IIS Management Console
	Volume Activation Services Web Server (05) Windows Deployment Services Windows Server Update Services		☑ Inclu	de management tools (if applicable)

Figure 9: Adding Web Server (IIS)

- 6. Do not select any features, and click **Next**.
- 7. Add Web Server (IIS) Role Services
 - a. Under Security, select the option for Windows Authentication.
 - b. Under Application Development, select the options for:
 - ASP and
 - ASP.NET 3.5
 - ASP.NET 4.5
 - ISAPI Extensions
 - ISAPI Filters
 - .NET Extensibility 3.5
 - .NET Extensibility 4.5

By manually selecting **ASP.NET**, **ASP.NET 3.5**, and **ASP.NET 4.5**, the wizard will prompt you to accept the others, as they are required to for these services to run.

- c. Under Management Tools, select the following:
 - IIS Management Console
 - IIS 6 Management Compatibility
 - IIS 6 Metabase Compatibility
 - IIS 6 Management Console
 - IIS 6 Scripting Tools
 - IIS 6 WMI Compatibility

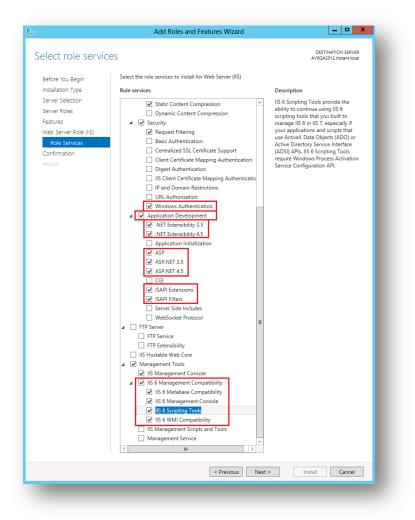


Figure 10: Adding require role services

- 8. Click **Next** once these services have been selected.
- 9. Click **Install** to install the required services to your server.

actallation pro		DESTINATION SERVER
nstallation progr	ess	AV5QA2012.instant.local
	View installation progress	
	1 Starting installation	
	.NET Framework 3.5 Features	
	.NET Framework 3.5 Features .NET Framework 3.5 (includes .NET 2.0 and 3.0)	
	.NET Framework 4.5 Features	
	ASP.NET 4.5	
Results	Web Server (IIS) Management Tools	
	IIS 6 Management Compatibility	
	IIS 6 Management Console	
	IIS 6 Scripting Tools IIS 6 Metabase Compatibility	
	IIS 6 WMI Compatibility	
	IIS Management Console	
	Web Server	
	Application Development ASP	
	ASP.NET 3.5	
	ASP.NET 4.5	
	ISAPI Extensions	
	ISAPI Filters .NET Extensibility 3.5	
	.NET Extensibility 4.5	
	Common HTTP Features	
	Default Document	
	Directory Browsing HTTP Errors	
	Static Content	
	Health and Diagnostics	
	HTTP Logging	
	Performance Static Content Compression	
	Security	
	Request Filtering	
	Windows Authentication	
	Export configuration settings	
	< Previous Next >	Install Cancel

Figure 11: Installing required services

10. Installation of these services may take several minutes. Once complete, you are ready to begin installing HR Auditor.

HR AUDITOR INSTALLATION

Once the required role services are installed, you are ready to begin installation of the HR Auditor application.

- 1. Run setup.exe.
- 2. You will be prompted to install the .NET 4 Framework if it is not already installed on the server.
- 3. Proceed through the configuration wizard.

During the installation, a window will pop to allow for configuration of the application. Compete each of the steps to complete the installation.

Instant Configuration Wizard		٩
<u> </u>	Configure AD Provide the basic information to connect to search your Microsoft Active Directory	
ant	2 Configure SQL Provide access to SQL Server and LCSLog database	
nstal	3 License Key Enter your license key and specify evaluation or full version	
⊇_ 0	Test IIS Test the basic configuration of the HR Auditor virtual directory and common issues	
	5 Pick Admin Pick a user as administrator for HR Auditor	ł
	Launch Site	
	Further documentation and setup information can be found at <u>http://www.instant-tech.com/hrauditor/hrauditor_install.pdf</u>	1
	Don't show this on startup Close	

Figure 12: Configuration Wizard

CONFIGURE ACTIVE DIRECTORY

The first setting to be configured is Active Directory.

- 1. Click the button to Configure AD, and the wizard will pop a dialogue box.
- 2. Enter the FQDN or IP address of the server hosting Active Directory
- 3. Enter the username the application can use to query your Active Directory
- 4. Enter the password for the username provided. The password will be encrypted. HR Auditor requires read access of your Active Directory.
- 5. Click **Validate** to test the connection to Active Directory. If the tool reports a successful connection, click **OK** to proceed. If a connection can't be made, ensure that you have provided the correct values.

Enter the AD server IP address or fully qualified domain name instantdc.instant.
instantdc.instant.
Enter the AD Use INSTANT\admir Connected Successfully
Enter the AD Pa: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
Validate Cancel OK

Figure 13: Active Directory Configuration

CONFIGURE SQL

The second setting to be configured is the SQL database containing LCSLogs. HR Auditor requires read access to your SQL server.

You have two options to configure your database connection: SQL Authentication or Windows Authentication.

TO ENABLE WINDOWS AUTHENTICATION

- 1. Enter the FQDN or IP address of the SQL server with your LCSLogs.
- 2. Select the radio button labeled **Windows Authentication**.
- 3. Enter the username the application will use to query the database.
- 4. Enter the password for the username provided.
- 5. Click **Validate** to test the connection to the SQL server. If the tool reports a successful connection, click **OK** to proceed. If a connection can't be made, ensure that you have provided the correct values.

Infigure SQL Connection	Configure SQL Connection
 Windows Authentication SQL Authentication 	Windows Authentication SQL Authenti
Username:	Username: Connected successfully
Password:	Password: OK
Validate Cancel OK	Validate Cancel OK



TO ENABLE SQL AUTHENTICATION

- 1. Enter the FQDN or IP address of the SQL server with your LCSLogs.
- 2. Select the radio button labeled **SQL Authentication**.
- 3. Enter the username the application will use to query the database.
- 4. Enter the password for the username provided.
- Click Validate to test the connection to the SQL server. If the tool reports a successful connection, click OK to proceed. If a connection can't be made, ensure that you have provided the correct values.

onfigure SQL Connection	Configure SQL Connection Enter the SQL server IP address or fully qualified do sqlstore.instant.local	omain name
© Windows Authentication	Windows Authentication SQL Authentication	×
SQL Authentication Username:	SQL Authentication Username: Sa	sfully
Password:	Password:	ок
Validate Cancel OK	Validate	OK

Figure 15: SQL Connection configuration

ENTER LICENSE KEY

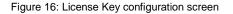
TRIAL LICENSE

- 1. Enter your company name in the corresponding input field.
- 2. Select which version of Microsoft Lync your organization is using.

NOTE: There are differences in the way the LCSLogs are set up between the 2010 and 2013 versions of Lync. Selecting the wrong option here may result in the application not performing properly.

3. Click **Validate Key** to test the key. The wizard should report the name of your company, number of users licensed, and any restrictions imposed by the trial license.

Enter License Key	Trial Version 🛛 🗙
Enter an HR Auditor License Key	
C	Licensed to TestingCo
Enter your company name:	5 Users 10 Lines of chat displayed
	Valid until 11/2/2013
This install will be used with Lync 2010 C Lync 2013	
	ОК
Validate Key Cancel OK	



EXISTING LICENSE KEY

If you already have a license key from Instant Technologies, follow these steps to enter the key.

- 1. Select the radio button next to the field below Enter an HR Auditor License Key.
- 2. Enter your license key into the input field.
- Click Validate Key to test the key. The wizard should report the name of your company and the number of users licensed. If you enter the key incorrectly, the wizard will report it as an invalid key.

TEST IIS

- 1. Click **Test IIS** to perform a check of your current settings. The wizard will report whether your current settings will work with HR Auditor.
- 2. Configure any settings that fail manually, or click **Configure IIS**, and the wizard will change the settings for you.

Configure IIS Settings
Test IIS ConfigureIIS
CW has detected the following settings on your computer:
Anonymous authentication has been disabled. Windows authentication has been enabled. INSTANT_HR_AUDITOR pool started Setting runtime version
Retesting
Testing anonymous login settingsAnonymous login is disabled PASS Testing Windows authentication settingsWindows authentication is enabled PASS Testing IIS app pool settingsINSTANT_HR_AUDITOR is Started. runtime version: v4.0 PASS LosLog Messages table does not seem to have recent data in it. You may wish to make sure that logging is enabled with Lync WARNING
Launch PDF!CancelOK

Figure 17: IIS Settings configuration screen

ASSIGN AN ADMINISTRATOR

The last setting requires you to assign a user to act as an Administrator for the HR Auditor program. This user will have the ability to add or remove users to the application, update the license key, and configure the connection settings. This user does not need to have Administrator rights in Active Directory.

- 1. Enter the username into the first field.
- 2. Click **Check User**. If the username is found, the wizard will report that the user is valid. If the username is not found, the system will display a list of names close to the one you typed.
- 3. Click OK to assign the user as the first Administrator for the application

	nistrator ame of the first HR Audito er users and admins.	r administrator,
mquinlan		
	User Found	×
	User mquinlan is valid	
	OK	
Check User	Cancel	ОК
-		

Figure 18: Assigning an administrator

INSTALLATION COMPLETE

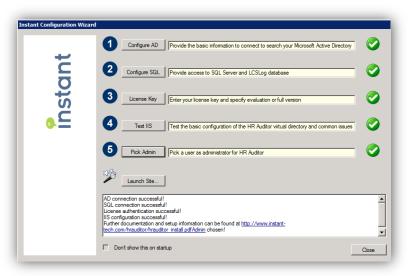


Figure 19: Configuration wizard on successful install.

Once all of these settings are configured, you can hit Close.

The application can now be accessed from <SERVERIPADDRESS>/hr_auditor/

VERIFY AUTHENTICATION SETTINGS

After installation, you should verify that the authentication settings are correct. These may need to be configured manually. These settings can be inspected and changed using the Server Manager.

The proper settings are:

IIS Authentication	
Windows Authentication	Enabled
ASP.NET Impersonation	Enabled
Anonymous Authentication	Disabled
Forms Authentication	Disabled

ASP.NET Settings	
.NET Authorization Rules	Allow All

Application Pool Settings INSTANT_HR_AUDITOR Started

Started | .NET Framework v4.0

Users

INTERNET INFORMATION SERVICES (IIS) SETTINGS

- 1. Access the IIS settings under Roles -> Web Server (IIS) -> Internet Information Services
- Navigate to the HR Auditor site SERVERNAME -> Sites -> Default Web Site -> hr_auditor Note: If you chose settings different from 'Default Web Site' during the installation, navigate to the directory you specified.
- 3. Click on IIS Authentication. You should see 4 authentication options available.
 - 3.1. Ensure that **ASP.NET Impersonation** and **Windows Authentication** are enabled.
 - 3.2. Forms Authentication and Anonymous Authentication should be disabled.

Server Manager				
File Action View Help				
🗢 🔿 🖄 🛅 🔢				
Server Manager (VAV5QA)	Internet Information Services	(IIS) Manager		
Web Server (IIS)		Sites Default Web Site hr_au	iditor 🕨	
Features Diagnostics Configuration	Connections	Authentication		
	Start Page	Group by: No Grouping		
	Application Pools	Name 🔺	Status	Response Type
	🖃 🐻 Sites	Anonymous Authentication	Disabled	
	🗄 🏀 Default Web Site	ASP.NET Impersonation	Enabled	
	🕀 🧰 aspnet_dien	Forms Authentication	Disabled	HTTP 302 Login/Redirect
	i … 🎓 hr_auditor	Windows Authentication	Enabled	HTTP 401 Challenge

Figure 20: Proper IIS Authentication settings

ASP.NET SETTINGS

- 1. Access the IIS settings using Server Manager
 - Roles -> Web Server (IIS) -> Internet Information Services
- Navigate to the aspnet_client settings SERVERNAME -> Sites -> Default Web Site -> aspnet_client Note: If you chose settings different from 'Default Web Site' during the installation, navigate to the directory you specified.
- Click on .NET Authorization. Verify that there is only one rule specified. The rule specified should be: Mode: Allow Users: All Users

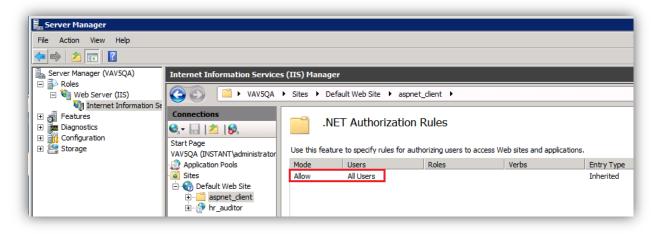


Figure 21: Proper ASP.NET authorization setting.

APPLICATION POOL SETTINGS

- Access the IIS settings under Roles -> Web Server (IIS) -> Internet Information Services
 Access Application Pools
- *SERVERNAME* -> Application Pools
- 3. Under "Application Pools", ensure that "INSTANT_HR_AUDITOR" is started.
- 4. Verify that the App Pool is running .NET Framework v4.0. To change this setting, right click on INSTANT_HR_AUDITOR and click **Basic Settings**. You can then select v4.0 from the dropdown menu. Click **OK** to apply the settings.

File Action View Help							
Server Manager (VAV5QA)	Internet Information Service	es (IIS) Manager					
Roles Web Server (IIS) Internet Information:		Application Pools					
Features Diagnostics	Connections	Applicatio	on Pools				
	Start Page VAV5QA (INSTANT\admir Application Pools B Sites	associated with worker p different applications.	processes, co	ontain one or mo	re applications, and p		e
	VAV5QA (INSTANT\admir	associated with worker p different applications. Filter:	rocesses, co	Go - 🔂 Shov	v All Group by: N	provide isolation among o Grouping	•
	VAV5QA (INSTANT\admir	associated with worker p different applications. Filter: Name	v orocesses, co v orocesses, co v orocesses, co	Go - Shov	v All Group by: Na Managed Pipeli	provide isolation among o Grouping Identity	• App
	VAV5QA (INSTANT\admir	associated with worker p different applications. Filter: Name A ASP.NET v4.0	rocesses, co	Go - 🔂 Shov	v All Group by: N	provide isolation among o Grouping	App 0
	VAV5QA (INSTANT\admir	associated with worker p different applications. Filter: Name	Status Started Started	Go - C Shov	v All Group by: No Managed Pipeli Integrated	o Grouping Identity ApplicationPoolIden	 App 0 0
 ∰ Configuration ∰ Storage	VAV5QA (INSTANT\admir	Associated with worker p different applications.	Status Started Started	Go - Go Shov NET Frame v4.0 v4.0	v All Group by: Ni Managed Pipeli Integrated Classic	o Grouping Identity ApplicationPoolIden ApplicationPoolIden	 Appi 0 0 0

Figure 22: Proper Application Pool settings.

ACCESSING THE APPLICATION

To access the HR Auditor application, enter the following address into your preferred web browser: http://<serverIPAddress>/hr_auditor