



## Instant HR Auditor Installation Guide

Fall, 2013

## **Copyright and Disclaimer**

This document, as well as the software described in it, is furnished under license of the Instant Technologies Software Evaluation Agreement and may be used or copied only in accordance with the terms of such license. The content of this document is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Instant Technologies. Instant Technologies assumes no responsibility or liability for any errors or inaccuracies that may appear in this document. All information in this document is confidential and proprietary.

Except as permitted by the Software Evaluation Agreement, no part of this document may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, recording, or otherwise, without the prior written permission of Instant Technologies .

Copyright © 2005 - 2013 Instant Technologies, All rights reserved.

## **Trademarks**

All other trademarks are the property of their respective owners.

## **Contact Information**

See our Web site for Customer Support information.

<http://www.instant-tech.com/>

## TABLE OF CONTENTS

System Requirements.....	4
Server Preparation .....	4
Enable Role services in Windows Server 2008 R2:.....	4
Enable Role services in Windows Server 2012:.....	7
HR Auditor installation.....	10
Configure Active Directory.....	11
Configure SQL.....	12
To Enable Windows Authentication.....	12
To Enable SQL Authentication.....	12
Enter License Key .....	13
Trial License .....	13
Existing License Key .....	13
Test IIS .....	14
Assign an Administrator.....	14
Installation Complete .....	15
Verify Authentication Settings .....	15
Internet information services (IIS) settings.....	15
ASP.NET Settings .....	16
Application Pool Settings.....	16
Accessing the Application .....	17

# 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.

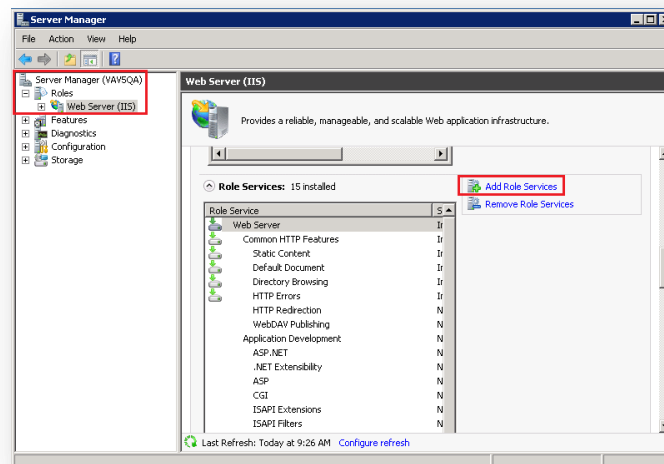


Figure 1: Adding Role Services (Web Server (IIS))

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

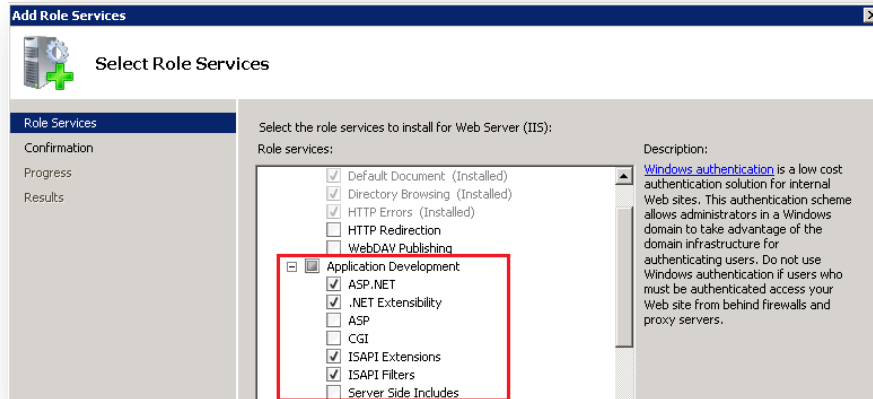


Figure 2: Select **ASP.NET**

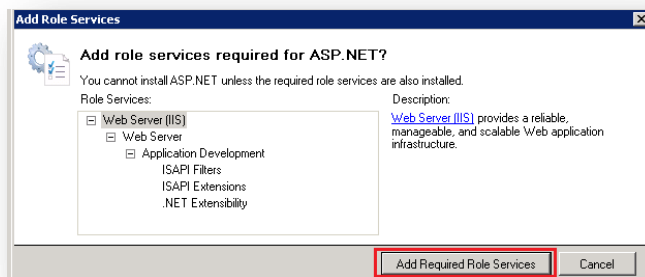


Figure 3: Select required role services for **ASP.NET**

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

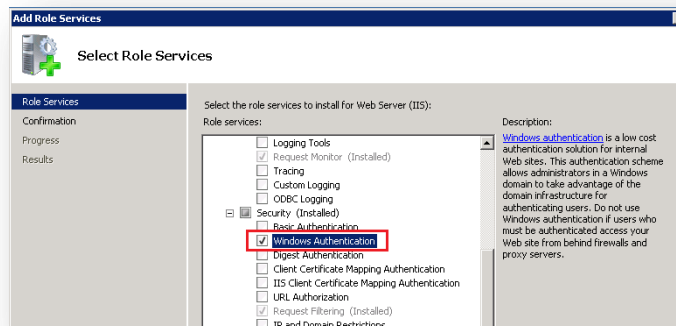


Figure 4: Selecting **Windows Authentication**

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

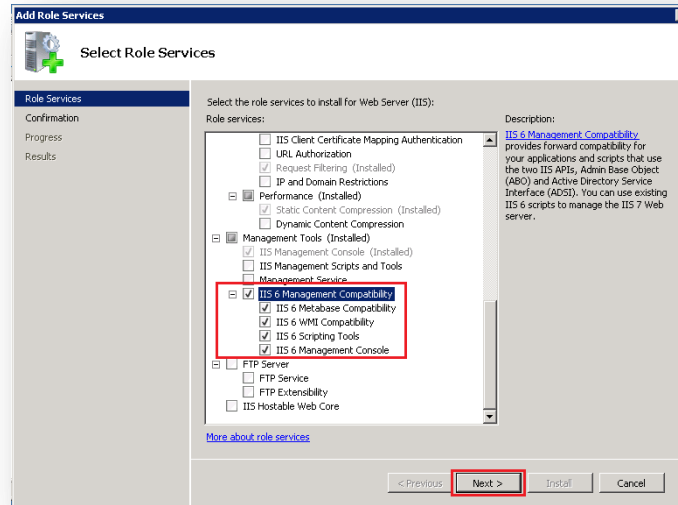


Figure 5: Selecting IIS 6 Management Compatibility

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.

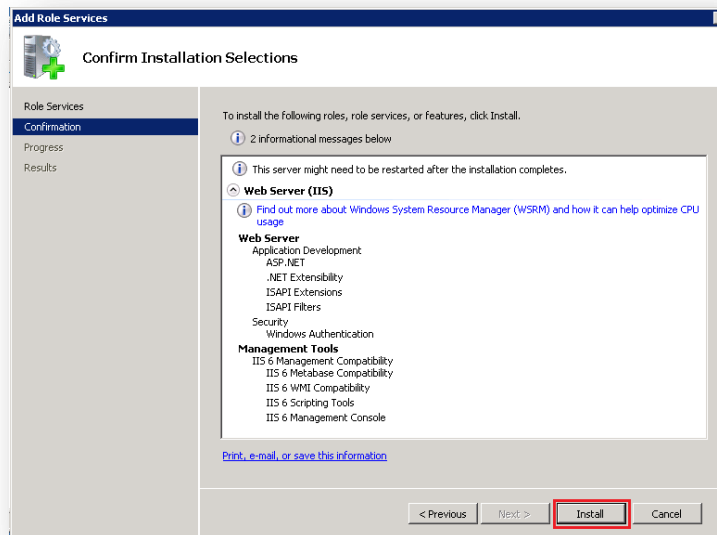


Figure 6: Install selected role services

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

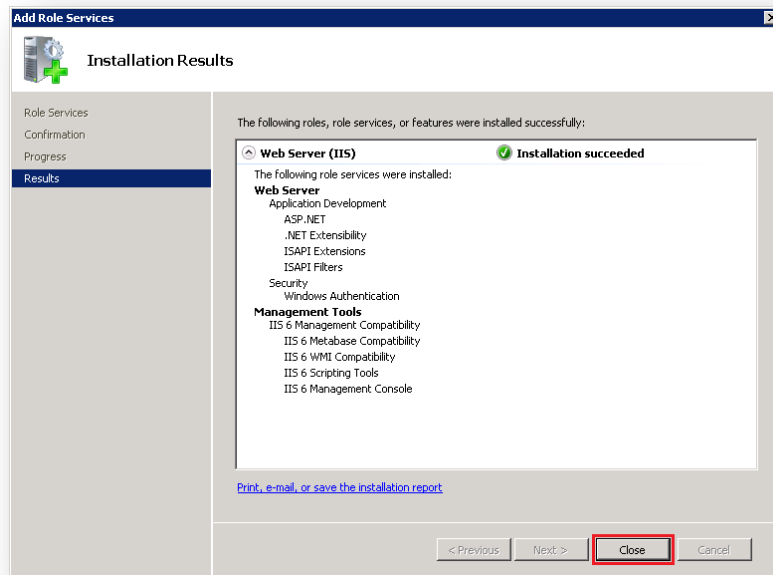


Figure 7: Installation of role services complete

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.

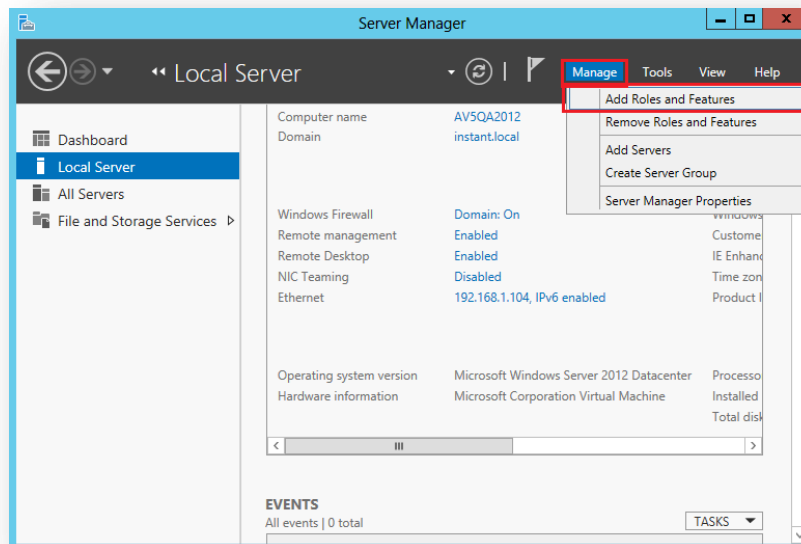


Figure 8: Add Roles and Features

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**.

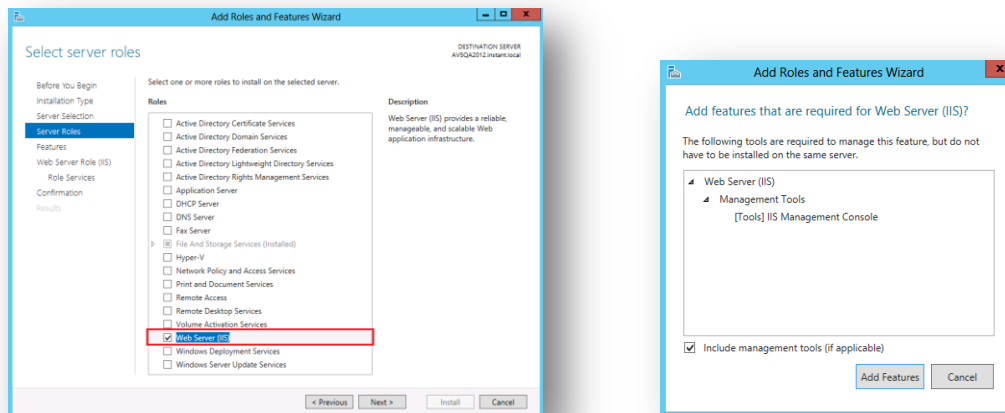


Figure 9: Adding Web Server (IIS)

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**



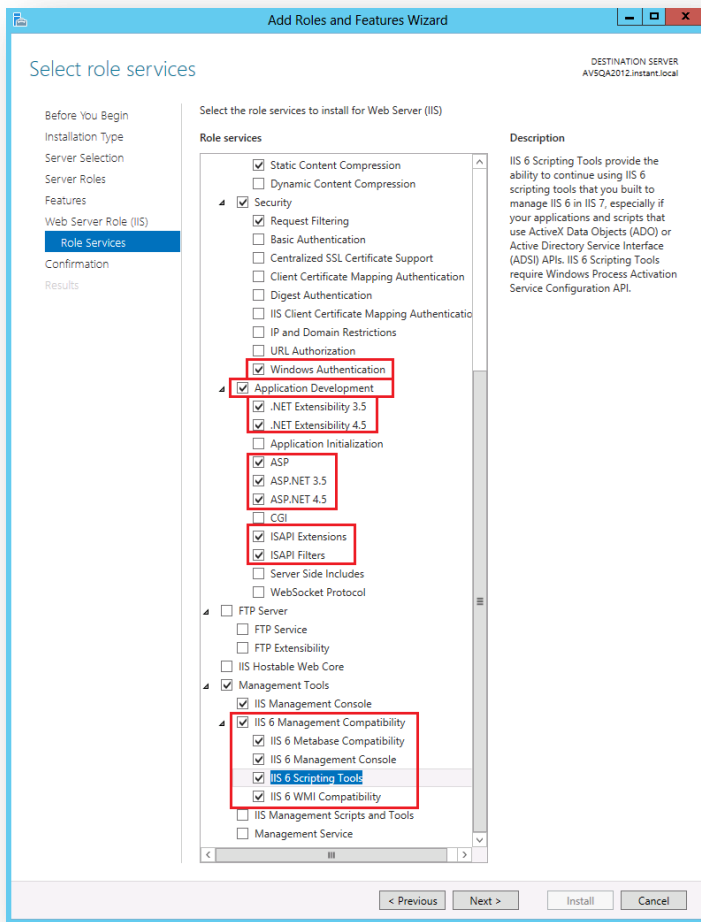


Figure 10: Adding require role services

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

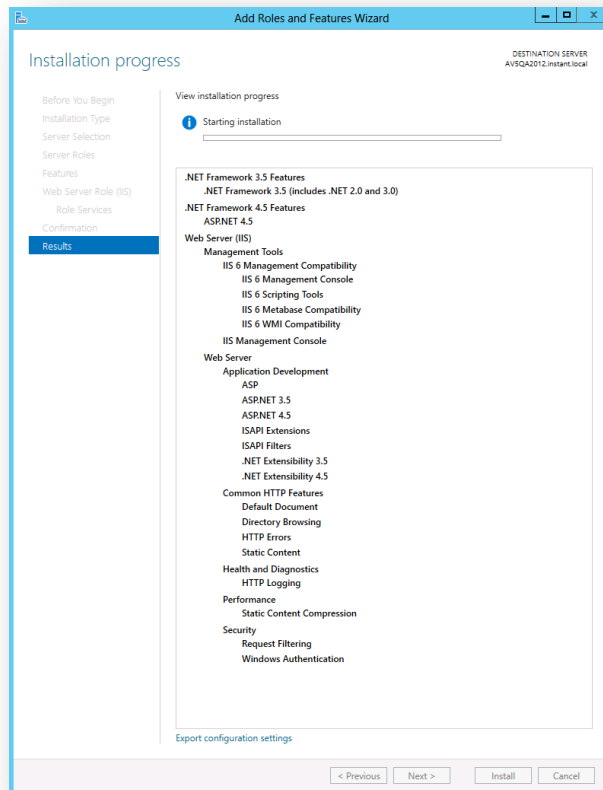


Figure 11: Installing required services

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. Complete each of the steps to complete the installation.

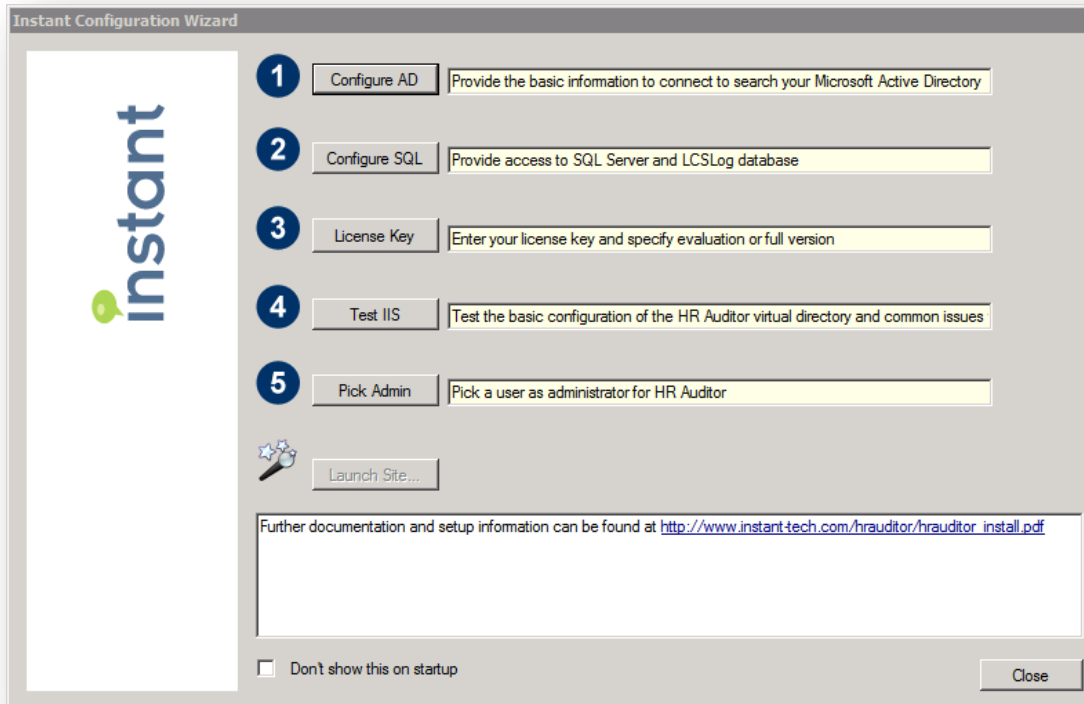


Figure 12: Configuration Wizard

## 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.

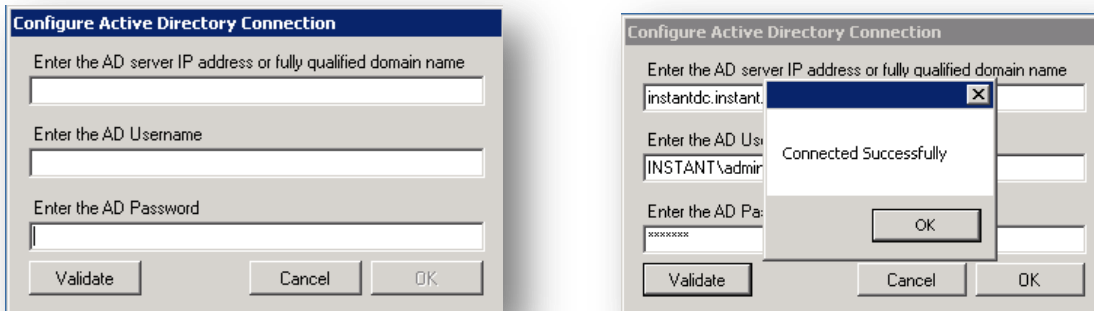


Figure 13: Active Directory Configuration

## 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.

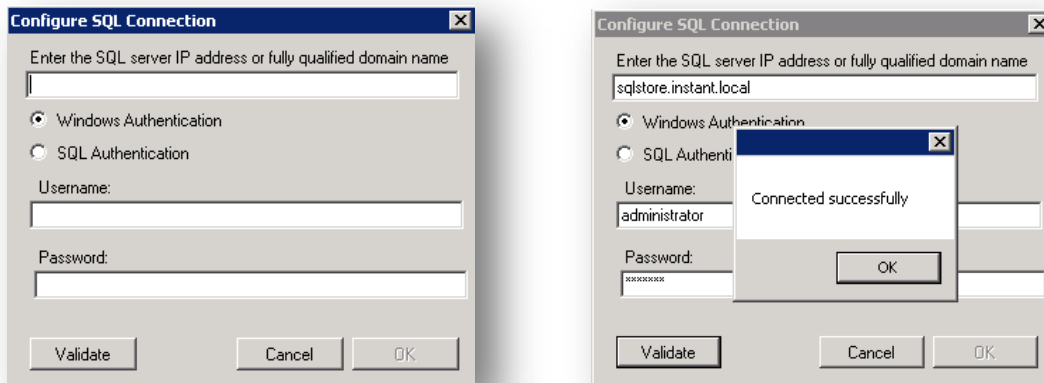


Figure 14: Windows Authentication

### 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.
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.

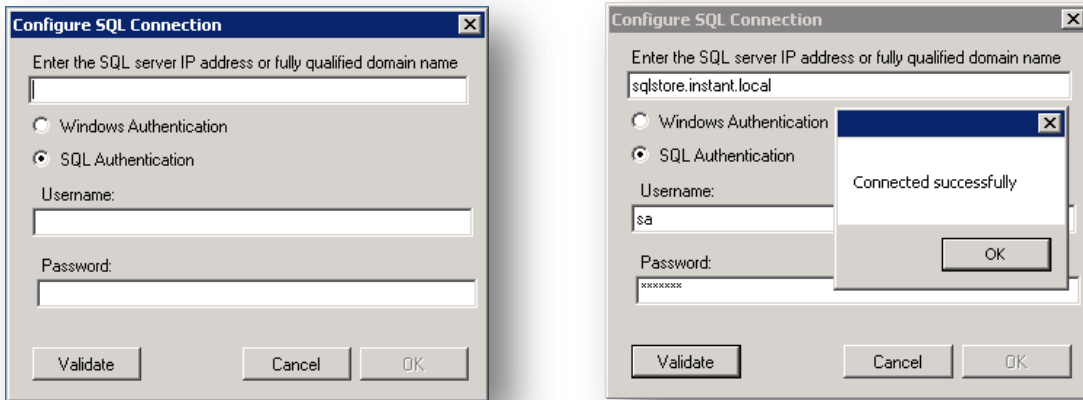


Figure 15: SQL Connection configuration

## 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.

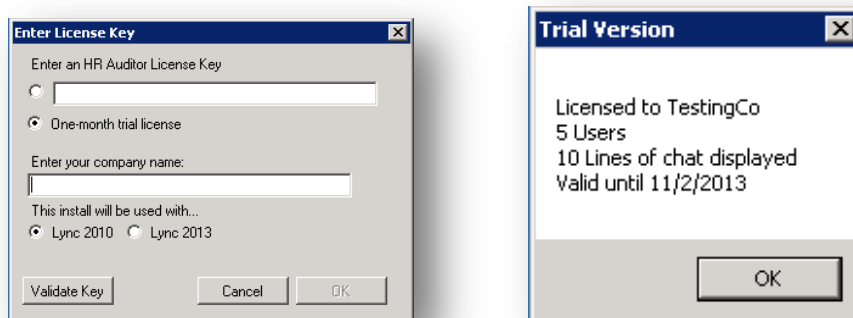


Figure 16: License Key configuration screen

### 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.
3. 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.

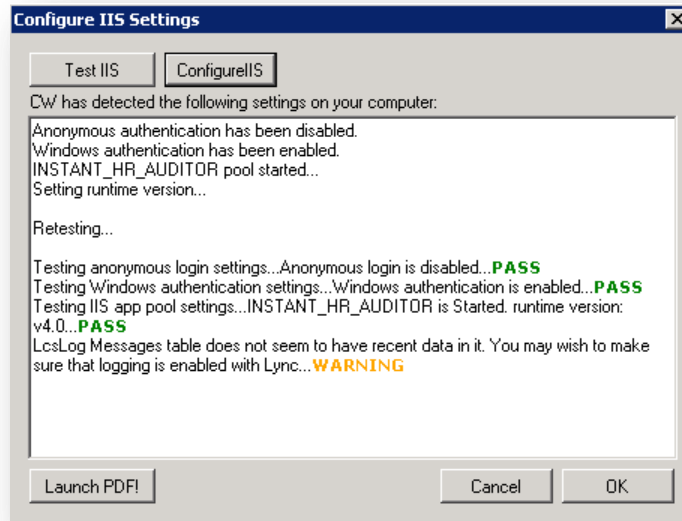


Figure 17: IIS Settings configuration screen

## 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

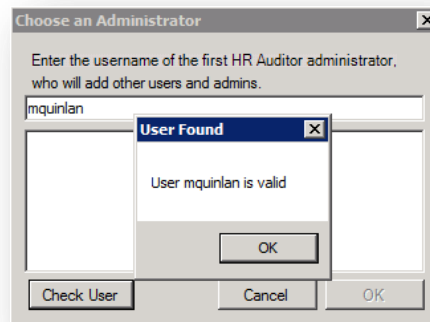


Figure 18: Assigning an administrator

## INSTALLATION COMPLETE

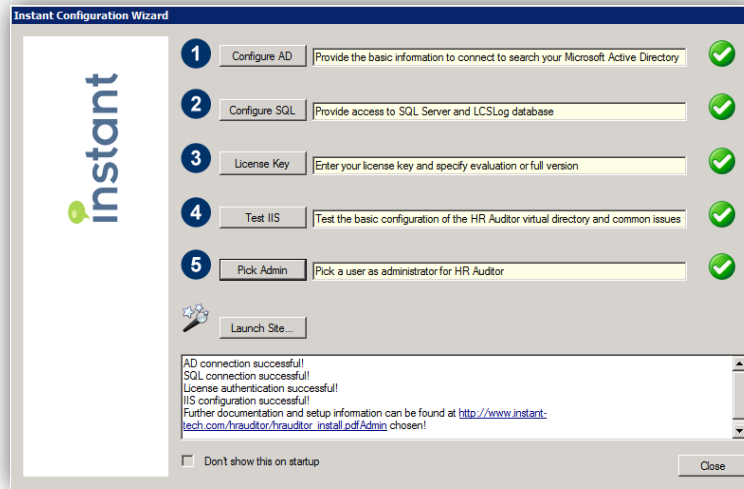


Figure 19: Configuration wizard on successful install.

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

<b>Windows Authentication</b>	Enabled
<b>ASP.NET Impersonation</b>	Enabled
<b>Anonymous Authentication</b>	Disabled
<b>Forms Authentication</b>	Disabled

### ASP.NET Settings

<b>.NET Authorization Rules</b>	Allow   All Users
---------------------------------	-------------------

### Application Pool Settings

<b>INSTANT_HR_AUDITOR</b>	Started   .NET Framework v4.0
---------------------------	-------------------------------

## INTERNET INFORMATION SERVICES (IIS) SETTINGS

1. Access the IIS settings under  
Roles -> Web Server (IIS) -> Internet Information Services
2. 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.

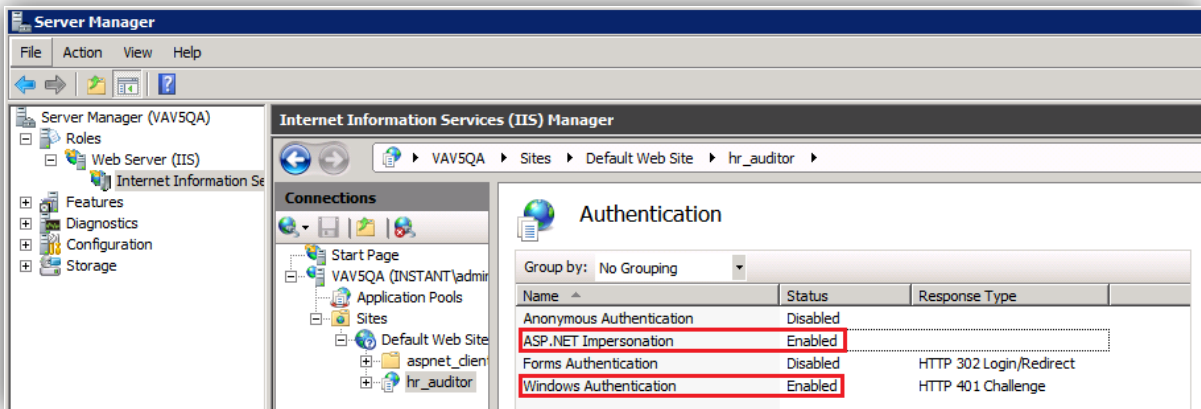


Figure 20: Proper IIS Authentication settings

## ASP.NET SETTINGS

1. Access the IIS settings using Server Manager  
Roles -> Web Server (IIS) -> Internet Information Services
2. 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.
3. Click on .NET Authorization. Verify that there is only one rule specified. The rule specified should be:  
Mode: Allow  
Users: All Users

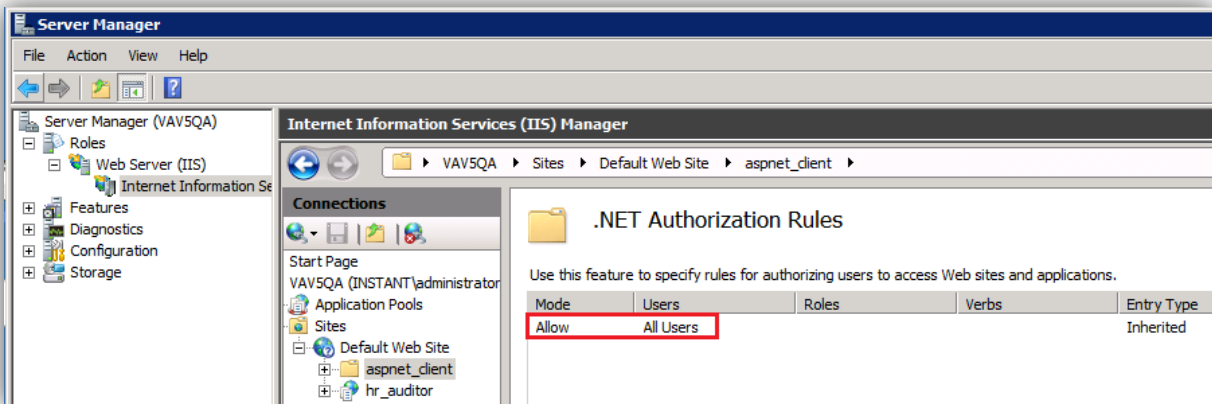


Figure 21: Proper ASP.NET authorization setting.

## APPLICATION POOL SETTINGS

1. Access the IIS settings under  
Roles -> Web Server (IIS) -> Internet Information Services
2. 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.



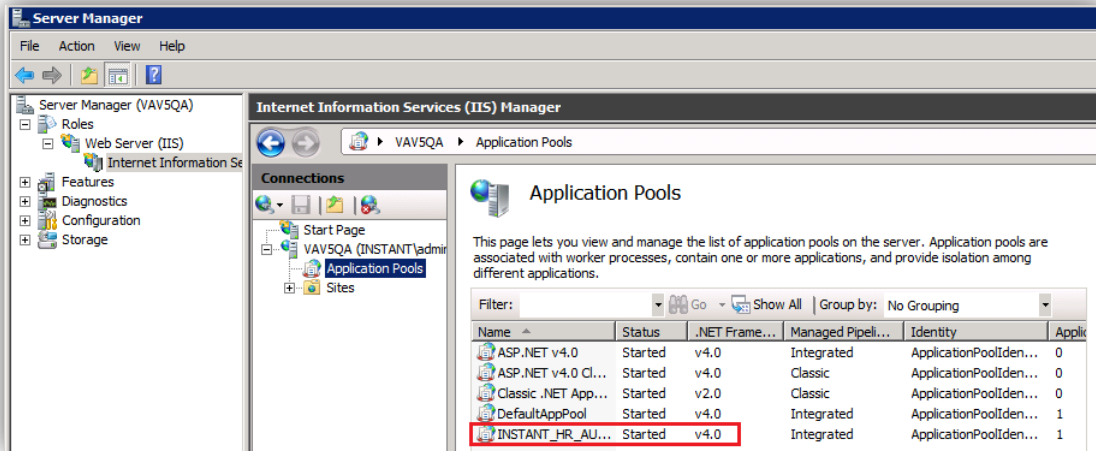


Figure 22: Proper Application Pool settings.

## ACCESSING THE APPLICATION

To access the HR Auditor application, enter the following address into your preferred web browser:  
[http://<serverIPAddress>/hr\\_auditor](http://<serverIPAddress>/hr_auditor)