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Introduction

This document covers the steps to be carried out after the IMiN Server software has been installed.

The central component of IMiN is EBS. EBS is responsible for user management and authentication, presence management, message delivery and a host of other features used by the IMiN applications. Before EBS can start to function fully, you will need to configure some core aspects of it. Each section in this document covers an aspect of EBS that needs to be configured. Some aspects are optional and some are not. Each section clearly states whether it is an optional step.



Administrator Web Application

This is a required section.

The configuration of all IMiN server components is carried out through the Administrator Web Application (from now on, referred to as the EBSAdmin). Before continuing, try to log in to the EBSAdmin. If the EBSAdmin is located on this computer, the URL will be <http://localhost/ebadmin/default.aspx>. If it is installed on a different computer, replace “localhost” with either the IP address or DNS name of the host computer.

If the EBSAdmin page loads correctly, you will be presented with a login screen. Log in using the login name “**Admin**” and the password “**ebadmin**”. You will be asked to change the password when you first log in. Set an appropriate password for the Admin account.

IIS Configuration Issues

The Microsoft Installer used to install the web applications has limited support for IIS and as such there are some configuration steps that cannot be consistently carried out by the installer. These result in some common errors reported when logging into the EBSAdmin for the first time. If you experience difficulty opening the EBSAdmin, then please refer to the following common errors and their solutions.

Common IIS Error 1: If a page is displayed stating that there was a configuration error, then make sure that the EBSAdmin folder is configured as an application within IIS.

- 1) Open IIS (in Control Panel->Administrative Tools).
- 2) Right click the EBSAdmin folder and choose properties.
- 3) In the Application Settings section, make sure that the folder is configured as an application. If not, click the “Create” button to do so.
- 4) Repeat this process for the Communicator, Email and SMSPager subfolders of EBSAdmin.

Common IIS Error 2: If a page is displayed stating “The resource cannot be found”, “The page cannot be found” or “HTTP Error 404” then try the following.

On Windows Server 2003:

- 1) Open IIS (in Control Panel->Administrative Tools).
- 2) Click the “Web Services Extensions” folder.
- 3) In the right hand pane, find an entry for “ASP.Net v1.1.4322” and make sure that the Status is set to Allowed. If not, highlight the ASP.Net entry and click the Allow button to the left.

On all versions of Windows

- 1) Open IIS (in Control Panel->Administrative Tools).



- 2) Under your computer name->Web Sites, right click “Default Web Site” and choose properties.
- 3) On the “Home Directory” tab, ensure the “Local Path” does NOT have a trailing slash ‘\’ character. For example, if this is “c:\inetpub\wwwroot\”, then change it to “c:\inetpub\wwwroot”

Common IIS Error 3: If a page is displayed stating “The page cannot be displayed due to an authorization error” or “Logged in as USER. Log Out Change Password”, then make sure that ASP.Net has been registered with IIS. This can be done by using a Microsoft tool called aspnet_regiis. This tool is located in “c:\<windows folder>\Microsoft.NET\Framework\v1.1.4322”. You must run this tool with the “-i” command line switch.

- 1) Go to Start->Run and type in cmd.
- 2) Type in “C:” and hit return.
- 3) Type in “cd\<windows folder>\Microsoft.NET\Framework\v1.1.4322”, replacing <windows folder> as appropriate depending on your windows version.
- 4) Type in “aspnet_regiis -i” and hit return.

If aspnet_regiis cannot be found, then you may need to reinstall the .Net framework in order to register ASP.Net. Use Add/Remove programs to uninstall the framework, and then look in the Redistributables folder of the IMiN Server installer for the .Net framework installer.



Define Zone Tree

This is a required section.

The EBS world consists of a Site which contains a hierarchy of Zones. Each zone contains any number of users and possibly other zones. Users can only be a member of a single zone. By default, users in any given zone will only be aware of users in their own zone. However, a user can browse to other zones to locate users outside their zone and communicate freely with those users.

For performance reasons, it is recommended that you do not have more than 1,500 users in a single zone. If you do not expect to have many more than 1,500 users, then you do not need to define a zone tree since the single default zone will do. If you intend to create more than 1,500 users, then it is strongly recommended that you create a hierarchy of zones into which all users will be added. Usually this hierarchy will match the internal organization of your company, with a zone for each major department, but the ultimate design can be anything you choose.

To create a zone tree, log on to the EBSAdmin and select the Zones section on the left column. Use “Add New” to repeatedly add all required zones.



Define Users

This is a required section.

EBS is the central component of IMiN which, amongst other things, manages all user accounts. EBS supports three mechanisms for adding users.

- 1) You can use the EBSAdmin to manually add each user to specific zones before anyone logs on. To add users this way:
 - a. Open the EBSAdmin
 - b. Click the Users link in the left hand column.
 - c. Click the “Add New” button to add each new user.
- 2) You can take advantage of a feature called “Auto Add User”. This feature will result in users being automatically added to the system as they log on for the first time. This feature is disabled by default. To enable it:
 - a. Open the EBSAdmin
 - b. Click the Users link in the left hand column.
 - c. Check the “Enable Auto Add User” checkbox at the top of the Users page.
- 3) You can configure EBS to integrate with Active Directory and retrieve its user list from there. In this mode, EBS also authenticates all users against Active Directory, which can greatly reduce the administrative overhead of an EBS installation. See the section “Configure Active Directory” for more information.

The user called “(Template_User)” determines the default settings used for all new users. That is, new users will have a copy of the template users’ active locations and will have the same rights/privileges. Also, in the case of 1) and 2) above, new users will be added to the same zone as the template user. In the case of 3), the zone that a new user is added to is defined by Active Directory.



Configure Active Directory

This is an optional section.

EBS can optionally integrate with your Active Directory tree. In this mode, every user will be able to use their standard windows username and password to log into EBS. Also, when a user is added to or deleted from your Active Directory, the change is reflected in EBS within minutes.

A service called EBSADBridge is responsible for all EBS interaction with your Active Directory. This service must be running on a computer that is a member of the Active Directory Domain/Forest that EBS is integrating with.

Note that if you have EBS configured with Active Directory, this does not prevent you from adding EBS users manually through the EBSAdmin. These users will exist in EBS separate to all Active Directory users and will be appropriately flagged in the EBSAdmin.

Before continuing, you must define the EBS zone tree you wish to use. See the “Define Zone Tree” section earlier in this document. For the purposes of this discussion, let’s assume you have two zones called “Accounting” and “Sales”.

Create and Populate Active Directory Groups

In order to import users from Active Directory, EBS must be given the name of the Active Directory groups to import. As such, you will need to define an Active Directory group for each EBS zone you wish to populate from Active Directory. You may already have appropriate groups defined in your Active Directory. If this is the case, then you can move to the next step.

Use your standard Active Directory administrative tools to create an Active Directory group for each EBS zone in your EBS zone tree. The name of the groups don’t matter, but we recommend a name of the form EBSUsers_[ZoneName]. So in this example you would create two Active Directory groups called EBSUsers_Accounting and EBSUsers_Sales.

After the groups are created, add all appropriate users to each group. For example, add all the users you want to appear in the EBS Accounting Zone into the EBSUsers_Accounting group.



Connect EBS to your Active Directory Domain(s)

- 1) Open the EBSAdmin
- 2) Go to the AD Domains section.
- 3) Click “Add New”
- 4) Enter the following:
 - a. Domain name (you must use the full AD style ‘.com’ name for the domain, e.g. IMiN.com)
 - b. Domain Administrator account name (usually “Administrator”)
 - c. Domain Administrator password. The password will be securely stored in the EBS database using AES encryption.
- 5) Click the “Save Changes” button in the leftmost column of the new row.

If the domain details are invalid, or a domain controller cannot be contacted for the domain, then the “Sync Failures” counter will increment. If this is ever non-zero, look at the AD Event Log in the EBSAdmin to see what the error is. A sync attempt is made every 5 minutes by default.

Once the EBSADBridge has successfully contacted the domain, the “Server” column will be filled in with the name of the domain server the bridge has connected to and will constantly synchronize with. If this server is undesirable, then you can manually enter a different server by editing the row for this Domain in the EBSAdmin and clicking the “Set Explicit” button to enter the name of a new domain server.

Import Active Directory Groups

- 1) In the EBSAdmin, go to the AD Groups section.
- 2) Click “Add New”.
- 3) Select the Domain the group is a member of, enter the name of the Active Directory group and finally select the EBS Zone that members of the Active Directory group are to be placed in.

Tweak Settings

The AD Properties section defines the properties which EBS attempts to read for each Active Directory user imported. These will generally never need to be changed.

The AD Settings page defines some settings that you can tweak. The most interesting of these is the ‘User Screen Name Format’. You can define the EBS Screen Name assigned to users based on the properties imported from Active Directory for each user.

Monitor

After you make any changes, you should monitor the AD Event Log until the next time a sync attempt is made. If there are any errors, they will show up here. If the sync is successful, the AD Event Log will detail all the information it imported into EBS.



Helpful Hint: While tweaking the Active Directory settings, temporarily change the Sync Interval down to 30 seconds.

- 1) In the EBSAdmin, go to the AD Settings section.
- 2) Change the value in Sync Interval to 0.5 for half a minute (30 secs).
- 3) Click “Save”.

As you make changes, the AD Event Log will be updated every 30 seconds as opposed to every 5 minutes. After you have finished tweaking the settings, change the sync interval back to 5 minutes in order to reduce the load on your Active Directory Server.



Configure an FTP Server

This section is optional but highly recommended. If you configure EBS with an FTP server, then EBS client components can be remotely installed and this can make the initial rollout of EBS a little easier.

IIS ships with an FTP server, but it may be disabled by default. Make sure that the IIS FTP Server is installed and running before continuing.

Note: It is strongly recommended that you do not install an FTP server on a Domain Controller. If IIS FTP is installed on a Domain Controller, then you must grant a domain level user access to the domain controller through FTP. This is difficult to configure and is also a security risk. If all your servers are Domain Controllers, then you can install an FTP server on any desktop machine that will be on most of the time.

To configure EBS with the IIS FTP Server running on a non-Domain Controller:

- 1) Create a local user account with the username “EBS_FTP” (the actual name does not matter, but it will be required later on) and an appropriately strong password. Make sure the account is active and the password never expires.
- 2) Create a folder on the local computer which will be used as the FTP root folder for the user we just created. It is recommended you create this folder in “c:\inetpub\ftproot” and give it the same name as the user from step 1.
- 3) Ensure the user from step 1 has ‘Full Control’ permissions for the folder created in step 2. Right click the folder, select properties and then click the Security tab. Click ‘Add...’ and select the user you created in step 1. Hit Ok. With the new user selected in the top list box, check the Full Control check box in the lower list box. Hit Ok.
- 4) Open IIS, right click “Default FTP Site” and choose New->Virtual Directory.
- 5) Using the New Virtual Directory Wizard:
 - a. Create a virtual directory with the same alias as the name of the user you created in step 1.
 - b. Point the Virtual Directory to the folder you created in step 2.
 - c. Grant both Read and Write access to the folder and finish the Wizard.
- 6) At this point, it is recommended that you test your FTP server to make sure it is working. You should be able to complete all these steps without error.
 - a. Start->Run, type in “cmd” and hit Ok.
 - b. In the command box, type in “ftp localhost” to initiate an FTP session with the local computer.
 - c. Attempt to log in using the user details you created in step 1.
 - d. After a successful login, type in “bye” and hit return to exit ftp.
 - e. Type in “exit” and hit return to close the command box.
- 7) Log into the EBS Administrator (<http://localhost/ebadmin/default.aspx>).



- 8) With EBS selected along the top row of tabs, select 'FTP Servers' in the left hand column and then click the "Add New" button.
- 9) Enter the IP or DNS Name of the computer running the FTP server and the username/password of the user you created in step 1. Save your changes.
- 10) If everything is set up correctly, you should be able to click the DNS/IP name of the FTP server and browse to the FTP server root.

Configure Application Updates

This step is optional and only possible if you configured EBS with an FTP server. When an application update is configured with the EBS system, EBS clients can remotely download and install the update. Adding an update to EBS involves placing the update on the FTP server and then telling the EBS system about the update.

Note: If the users on your network are relatively locked down and do not have enough privileges to install new software, then EBS deployed application updates will not work correctly for those users.

In the Client folder of the EBS Server installer you will find folders containing the client MSIs. The folders are called Proxy_X.X.XX and Communicator_X.X.XX where X.X.XX is the version number of that particular component. The following instructions will lead you through adding these as app updates within EBS.

You must first upload the updates to the FTP server so they are available for download by the clients. To do this, either:

- A) Log into the admin, go to FTP Servers, click the DNS/IP link to log onto the FTP Server and then drag and drop the two client folders onto the FTP server.
- or
- B) Copy the two client folders to the location that the FTP server points to on the local computer (e.g. C:\Inetpub\ftproot\EBS_FTP).

Once the installers are present on the FTP server, there is a multi step process to configure an update with EBS. All steps are carried out through the EBSAdmin, so before you go any further, log into the EBSAdmin.

- 1) Make EBS aware of the application update. For each update, you will need to:
 - a. Go to App Updates and click "Add..."
 - b. Select the application (Proxy/Communicator) and enter the version number (derived from folder name of the original update).
 - c. Click Ok.
 - d. Leave the Affected Apps as they are and click save changes (the left most icon button in the row).



- 2) Inform EBS of the location of the update on the FTP server.
 - a. Go to App Update Locations and click “Add...”
 - b. Select the appropriate App Update and FTP server from the drop down lists.
 - c. Click Ok.
 - d. Change the state to ‘Active’
 - e. Set the MSI Path to the name of the folder containing the update.
 - f. Set the MSI File to the name of the MSI file containing the update.
 - g. Optionally set any command line parameters or comment.
 - h. Save Changes.
- 3) Tell EBS which users are to receive this update.
 - a. Go to User App Versions
 - b. To make the update available to all users:
 - i. Edit the row for the (Template_User) and the application whose update was just added.
 - ii. Change the ‘Min Version’ to the version of the update that is now available on the FTP server.
 - c. To make the update available for a specific user:
 - i. Click Add...
 - ii. Select the appropriate application and user from the drop down lists.
 - iii. Click Ok
 - iv. Change the “Min Version” to the version of the update that is now available on the FTP server.

At this point the updates are ready to be downloaded and installed by EBS users.



Install Client software

This is a required section.

The next step in configuring your IMiN installation is to install the client software. There are two client components, EBS Proxy and IMiN Communicator. Both are packaged as Microsoft Software Installers (MSIs) and can easily be run from the clients' computer.

When installing the client MSIs, you must be logged on as a user with Administrator privileges. If this is not possible, or extremely undesirable, then see the document "Install IMiN Client without logging off restricted user" for an advanced installation procedure that allows you to install IMiN without logging off the current user.

By default, all IMiN MSI installers will install the product for all users on the current computer. During the installation, you can disable this if you wish by unchecking a checkbox on the third screen of the install sequence.

It is recommended, but not essential, that you install EBS Proxy before IMiN Communicator.

If you have added the Communicator client MSI as an EBS App Update through the EBSAdmin, then you will only need to install the EBS Proxy. When the user logs in to the EBS Proxy for the first time, it will download and install the Communicator client automatically.

When the Proxy is installed and run, it must be informed of the location of the Director before the user can use IMiN. You specify the Director location at one of three stages:

- 1) Wait until after the install and manually configure it.
- 2) Specify the address during the installation sequence.
- 3) Pass the address on the command line to the installer.

The first two options are moderately time consuming and so are only viable for smaller installations.

The MSI Command line

EBSProxy.msi supports two command line parameters that can be used to inform the proxy MSI of the Director location before installation. These are: DIRECTORADDRESS and DIRECTORPORT. Both parameters are optional. If the Director is running on a computer called EBS1 and using the default port of 5200, you could install the proxy using the following command line:

```
EBSProxy.msi /qr DIRECTORADDRESS=EBS1
```



Note: The /qr switch is an MSI switch that runs the MSI user interface in reduced mode. This means that the installer will run through from beginning to end without requiring you to click any 'Next' buttons.

The most efficient way to pass these command line arguments is to place the EBSProxy.msi on a shared network drive and to create a shortcut pointing to the MSI that contains the appropriate command line arguments.

For example, on a server called EBS1, you would share a folder containing the EBSProxy.msi and call the share EBSInstall. The proxy MSI is now accessible from anywhere on the network using the path \\EBS1\EBSInstall\EBSProxy.msi. Now create a shortcut in this same shared folder that has the command line:

```
\\EBS1\EBSInstall\EBSProxy.msi /qr DIRECTORADDRESS=EBS1
```

If you run this shortcut from any location on the network, it will install the proxy with the Director address already configured correctly.

If you have not configured Communicator as an EBS App Update, then it is recommended that you also place the IMiNCommunicator.msi installer in the same location as EBSProxy.msi and create a shortcut with the following command line:

```
\\EBS1\EBSInstall\IMiNCommunicator.msi /qr
```

With both these shortcuts in place, you can install the IMiN client software by simply running these two shortcuts from each computer on your network.