Using ProfileCourier Classic

Release 9.1

Core Security SDI Corporation

1000 Holcomb Woods Parkway
Suite 401
Roswell, GA 30076
Phone: (678) 304-4500
Fax: (770) 573-3743

Trademarks

Table of Contents

List of Figures

List of Tables

ProfileCourier Customization Manager

In this Section:

Chapter 1: ProfileCourier Customization Manager

In this Chapter:

Java Runtime Environment

To use the Customization Manager for ProfileCourier Classic, you need to install a current version of the Java Runtime Environment on the administrators' client machines that run this application. You can download it from the following location:

www.java.com

ProfileCourier Overview

Overview

The ProfileCourier profile management solution empowers end users to securely enter their profile information into a data source (for example, a database or directory) without contacting the Help Desk. By requiring all end users to manage personal profiles with ProfileCourier, companies create a secure data source of unique authentication information that can be used for password reset requests.

This document describes how to configure ProfileCourier with the ProfileCourier Customization Manager. The ProfileCourier Customization Manager:

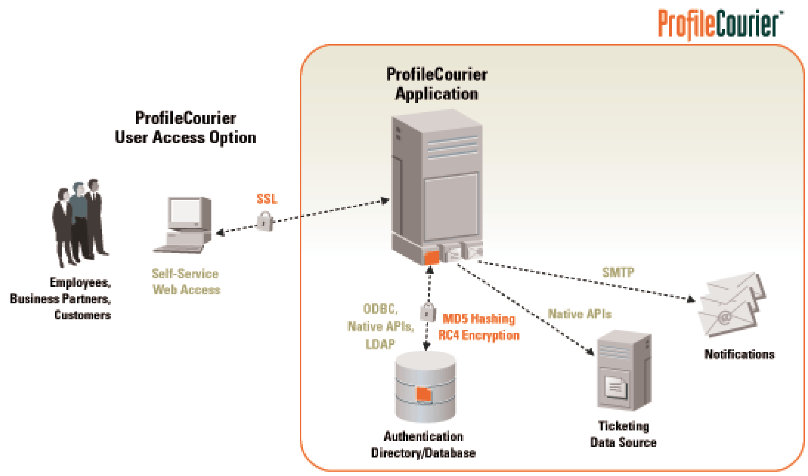
- Defines the layout presented to the end user to provide validation and authentication information
- Defines validation and authentication criteria for end users
- Identifies fields for end users to complete during their profile management
- Configures trouble ticket creation and/or generation of an e-mail message sent to serve as an audit trail of profile creation or update activity

Components and Requirements

Please see *Installing the Access Assurance Suite.*

ProfileCourier Functionality

Figure 1: ProfileCourier Architecture Overview



Validation and Authentication

ProfileCourier can be configured to require end users to validate (identify) themselves by entering one piece of public information that can be checked against their profile. ProfileCourier can also be configured to require end users to authenticate themselves (prove their identity) by entering one piece of confidential information that can be checked against their profile.

If an end user enters incorrect information during validation or authentication, ProfileCourier does not allow the end user to continue. The end user must enter and verify information before it is checked against their profile to ensure there are no typographical errors.

Profile Management

ProfileCourier can be configured so that an end user can create a new profile or update an existing one. The fields presented to the end user during the creation of a new profile are fully customizable with the ProfileCourier Customization Manager.

Data Security

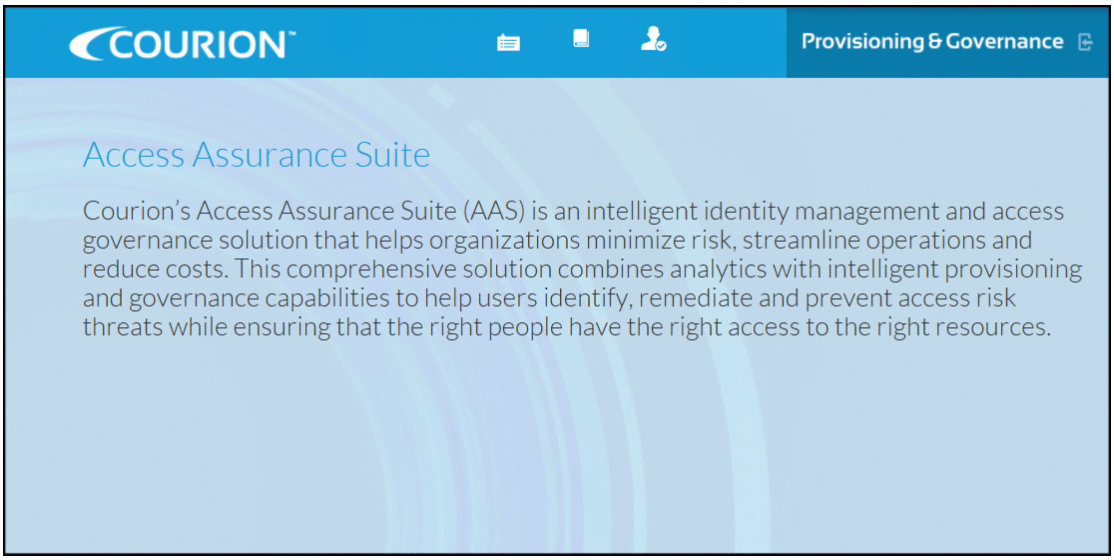
Selected fields may be marked so that their values are hashed or encrypted using the Data Security Utility (see the manual Using the *Access Assurance Suite Administration Manager*). Fields so marked take the entered data, compare it against a second, verification field to ensure the data is correct, hash or encrypt that data as appropriate, and store it in the data source. When an end user types new or additional information into such a field, the current value is cleared out and the new information is accepted. Upon the profile's creation or update, the newly entered data is hashed or encrypted and stored.

ProfileCourier Configuration

Access to the ProfileCourier Customization Manager

You configure ProfileCourier Classic using an interface called the Customization Manager. You access the Customization Manager is accessed through the Access Assurance Suite Portal page.

Figure 2: Access Assurance Portal Page



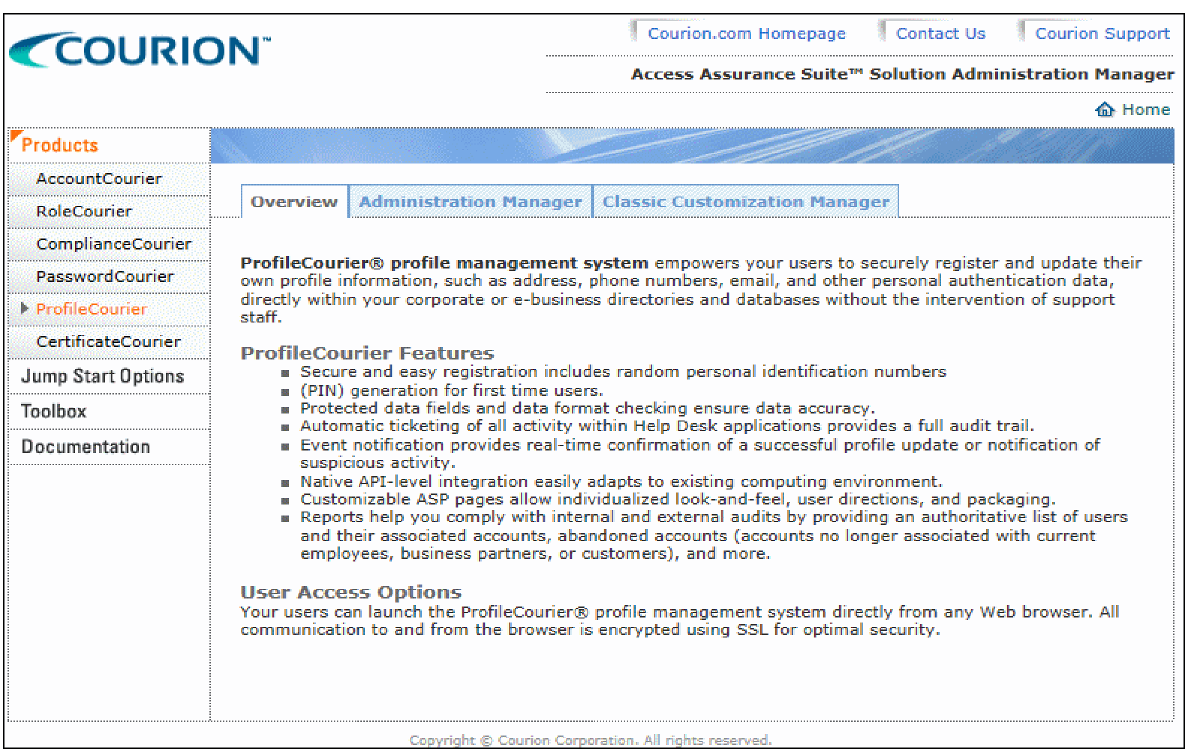
A screen appears with the Overview tab foremost, providing an overview of some ProfileCourier features as shown in *Figure 4*.

If you are logged in to the Access Assurance Portal with the appropriate privileges, you can select the Classic Customization Manager for ProfileCourier from the Main Menu, as shown in *Figure 3*.

Figure 3: Using the Main Menu

When you select Classic Customization Manager, the Customization Manager home page appears and you can select the Login tab (see *Figure 5*).

Figure 4: Access Assurance Suite Administration Console



Click the Classic Customization Manager tab to display information about the Customization Manager for ProfileCourier Classic. Click the **START** button to launch the Customization Manager.

Preconfiguration Information

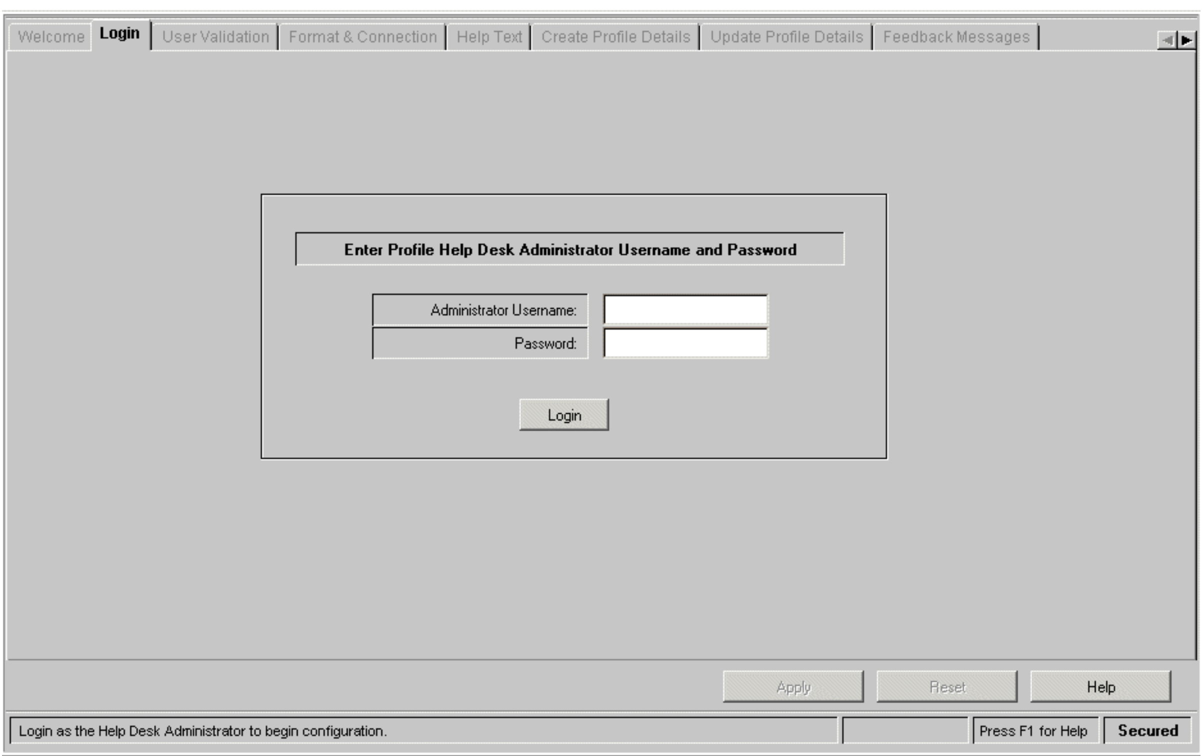
To configure ProfileCourier, the following information is needed:

- The profile data source field to identify end users when they log in to ProfileCourier
- The optional authentication field to identify end users when they log in to ProfileCourier
- The required and optional profile fields filled in by end users to complete their profile
- Whether or not end users will use ProfileCourier to update their profiles

Login Tab

The ProfileCourier Customization Manager requires the administrator to log on using the Login tab (*Figure 5*) to ensure that only qualified individuals make changes to ProfileCourier's configuration. The administrator is authenticated against the configured Courion Server.

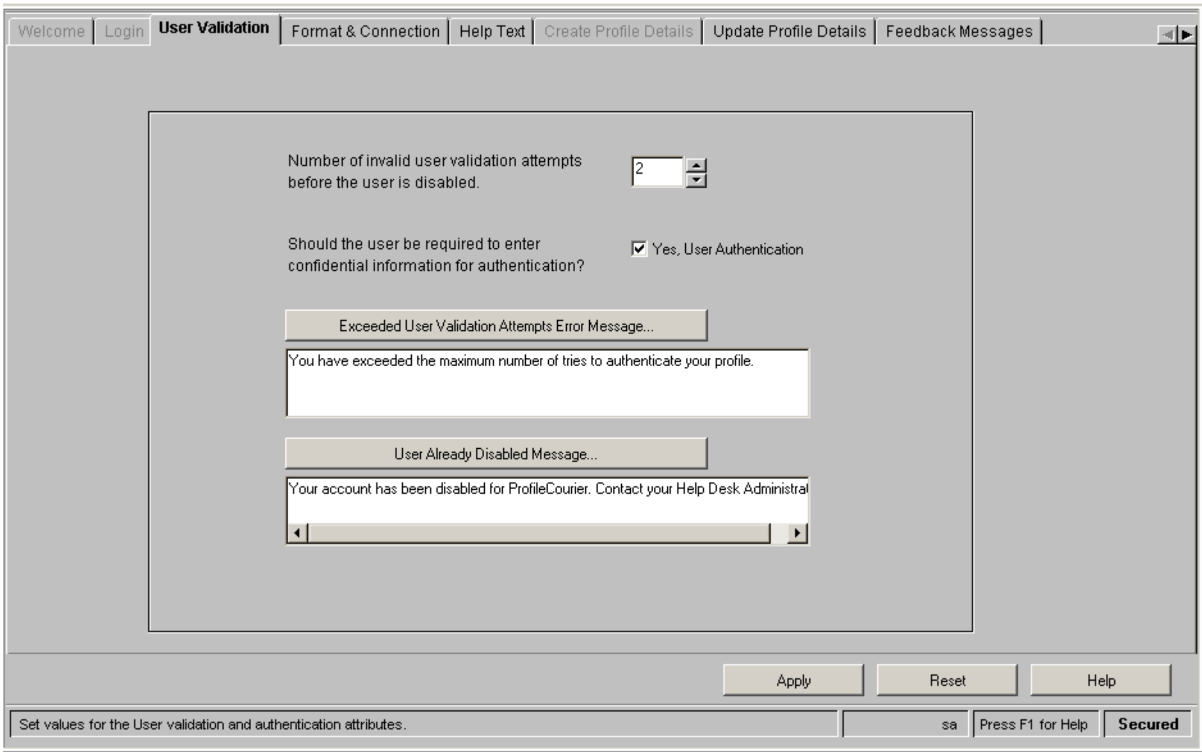
Figure 5: Login Tab



User Validation Tab

The User Validation tab (*Figure 6*) allows administrators to customize the end user validation process in ProfileCourier:

Figure 6: User Validation Tab

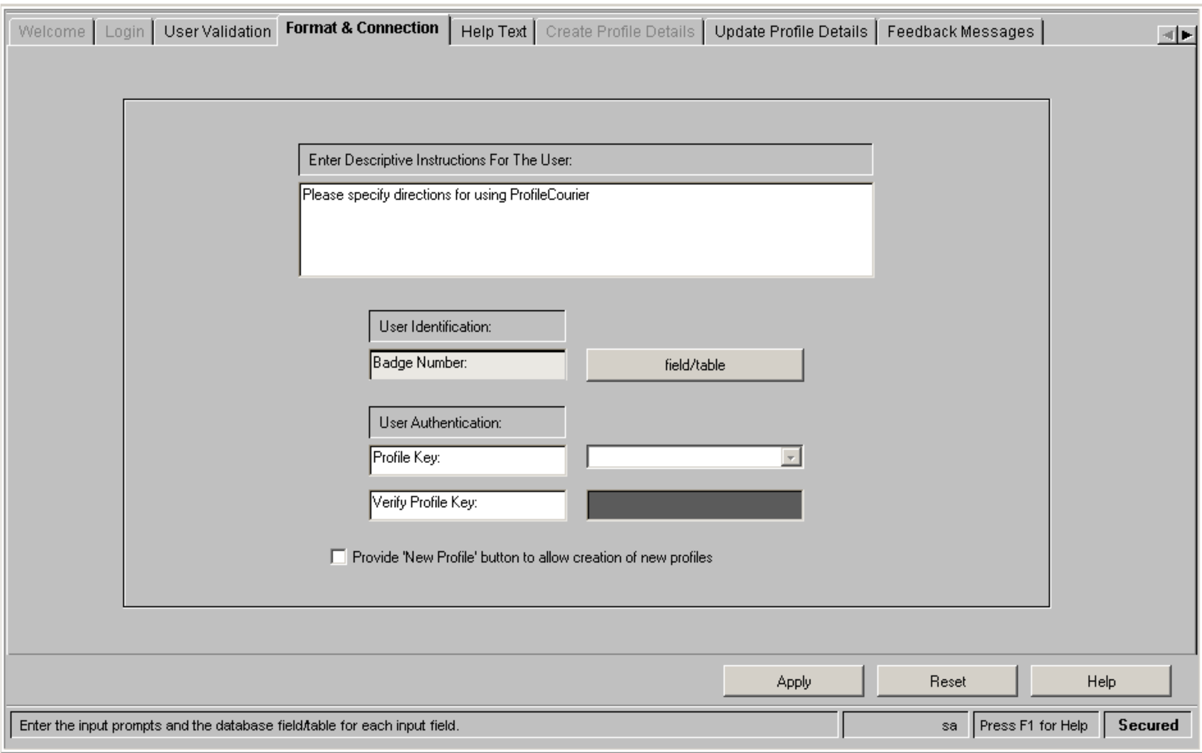


3. In the spin control for **Number of invalid user validation attempts before the user is disabled**, enter the maximum number of attempts that can be made by an end user at log in before being disabled from ProfileCourier (once disabled, end users can only be reenabled from the Enable Users Utility (see *Using the Access Assurance Suite Administration Manager*).
4. Select the **Yes, User Authentication** check box to present a required authentication field to the end user during log in.
5. To provide the end user with a prompt when the maximum number of validation attempts has been exceeded, click the **Exceeded User Validation Attempts Error Message...**”button to prompt the end user with a macro or value from a table (see *“Macros” on page 30*), or enter a custom message in the text field beneath the button.
6. To provide a message to end users who have been disabled from ProfileCourier, click the **User Already Disabled Message...** button to prompt the end user with a macro or value from a table (see *“Macros” on page 30*), or enter a custom message in the text field beneath the button.
7. Click the **Apply** button to save settings before moving to another tab. Click the **Reset** button to return all fields to their previously saved settings.

Format & Connection Tab

The Format & Connection tab (*Figure 7*) defines the look of the ProfileCourier end user log in window, and a descriptive text label at the top of the log in window explains how to use ProfileCourier to the end user. This tab also allows the administrator to define the data source fields against which authentication data is matched, and the profile table selected on this tab determines the profile table used for updating and creating profiles.

Figure 7: Format & Connection Tab



To define the fields displayed to the end user in ProfileCourier:

1. In the **Enter Descriptive Instructions For The User** field, enter text that describes how to use ProfileCourier. This text will be displayed at the top of the end user log in screen.
2. In the **User Identification** field, enter the text for the label that appears next to the Identification field. This text prompts the end user on what validation information to enter into this field.
3. Click the **field/table** button to identify the profile table and field against which the end user's identification data is compared. (If the profile table and field have been previously configured, the label on this button will reflect that configuration.) Since it is this field that is used to identify users, the field selected should have a unique value for each profile.

   Note: The selected table determines the table in which profiles are updated and created.

   Note: If the Create Profile Details and/or Update Profile Details tabs have been previously configured with fields from a table different from the table selected here, it is necessary to return to these two tabs and reconfigure the fields in accordance with the table selected here. Be sure to click the **<<Deselect All** button to

remove the fields that are no longer relevant. Next, begin customizing fields based on the profile table selected here.

4. If Authentication was selected in the User Validation tab, enter the text for the label that will appear next to the **USER AUTHENTICATION** field. This text prompts the end user on what authentication information to enter into this field.
5. The drop down menu to the right of the **USER AUTHENTICATION** field provides the list of fields (from the table selected in step 3) against which the end user's authentication data is compared.
6. In the field below the **USER AUTHENTICATION** field, enter a customized label for the verification of the authentication field.

   Note: If the check box for including authentication data was not selected, the Authentication labels and fields selection box do not appear. See *"User Validation Tab" on page 15* for more information.
7. Click the checkbox at the bottom of the panel to enable end users to create new profiles.

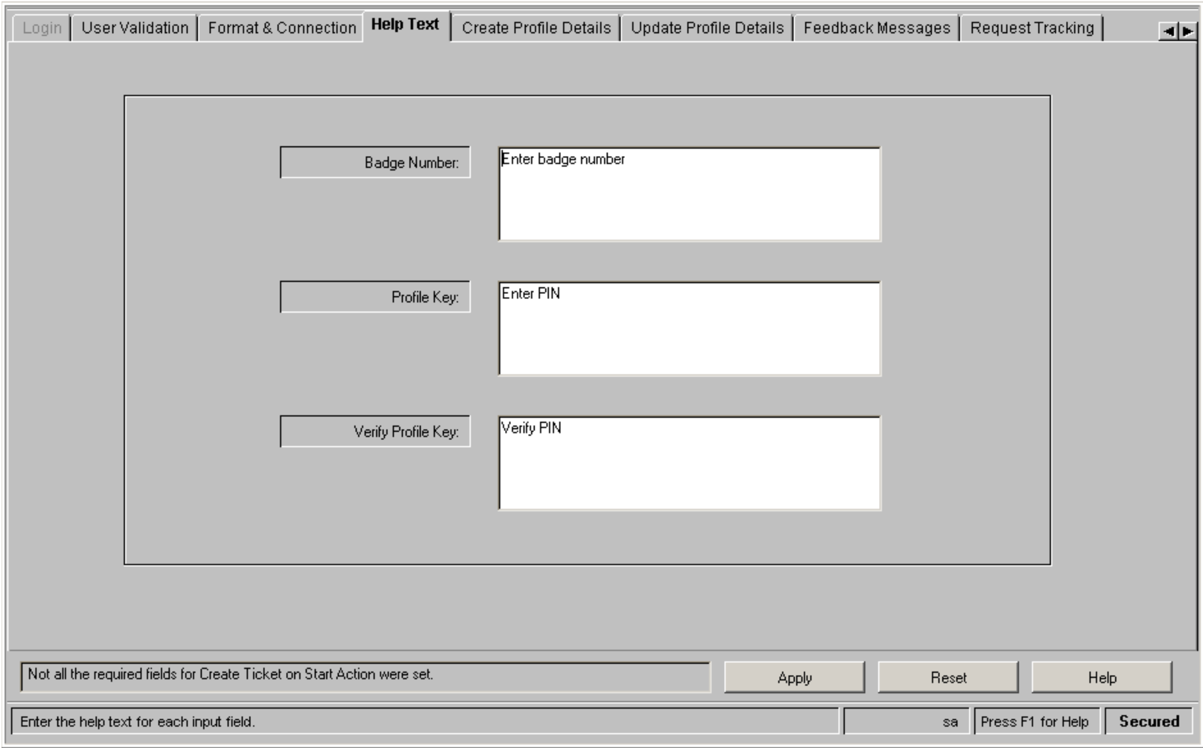
   Note: If the **NEW PROFILE** check box is selected, the Create Profile Details tab is enabled. If this check box is not selected, the Create Profile Details tab is disabled. See *"Create Profile Details Tab" on page 18* for more information.

Note: Click the **APPLY** button to save settings before moving to another tab. Click the **RESET** button to return all fields to their previously saved settings.

Help Text Tab

The Help Text tab (*Figure 8*) allows specification of custom help text for the fields that were configured on the Format & Connection tab.

Figure 8: Help Text Tab



The help text in each box is displayed when ProfileCourier is running and the mouse is over the help icon of the associated field.

Custom text may be inserted into each of these fields. Enter new lines into the text by pressing the **ENTER** key while the cursor is in the text box.

Note: If the check box for including authentication data was not selected, the Help Text tab will have a different appearance. See *"User Validation Tab" on page 15* for more information.

Note: Click the **APPLY** button to save settings before moving to another tab. Click the **RESET** button to return all fields to their previous settings.

Create Profile Details Tab

The Create Profile Details tab (*Figure 9*) is used to configure the layout and requirements for the fields displayed in ProfileCourier when the end user creates a new profile.

In the *"Format & Connection Tab" on page 16*, specify whether or not end users will be allowed to create new profiles. The creation of a profile in ProfileCourier relies on the underlying data source to enforce the uniqueness of the record and the constraints that exist on the fields.

This tab allows the administrator to configure:

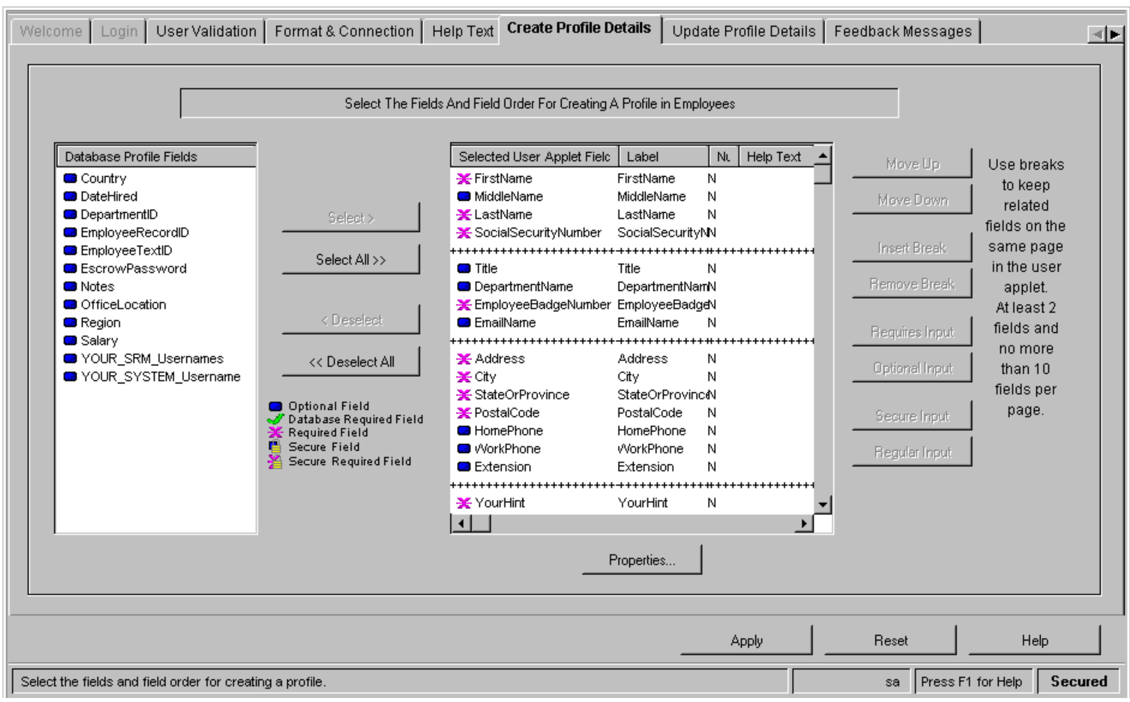
- The fields displayed to the end user
- The fields required to be filled in by the end user
- The order in which fields are presented
- The fields that have their values displayed as asterisks for security purposes

- The number of fields on each page
- The labels and help text for each selected field to display
- Maximum and minimum input lengths
- Numeric entry only for text fields

Note: When configured against an LDAP data source, a relative distinguished name field must be selected for creating directory entries. Select the relative distinguished name field from the drop down list of all available fields. (Since this selection is not needed for profile updates, the list box does not appear on the Update Profile Details tab.)

For instructions on configuring the end user interface in the Create Profile Details tab (*Figure 9*), see *"Configuration of End User Interface for Profile Creation and Update" on page 20*.

Figure 9: Create Profile Details Tab



Note: Click the **APPLY** button to save settings before moving to another tab. Click the **RESET** button to return all fields to their previously saved settings.

Update Profile Details tab

The Update Profile Details tab (*Figure 11*) is used to configure the layout and requirements for the fields displayed in ProfileCourier when the end user updates a profile. This tab allows the administrator to configure:

- The fields displayed to the end user
- The fields required to be filled in by the end user
- The order in which fields are presented
- The fields that have their values displayed as asterisks for security purposes
- The fields that are "display only" (for informational use)

- The number of fields on each page
- The labels and help text for each selected field to display
- Maximum and minimum input lengths
- Numeric entry only for text fields

Configuration of End User Interface for Profile Creation and Update

In the Create Profile Details and the Update Profile Details tabs, the attributes of the fields displayed are indicated by icons according to *Figure 10* below.

Figure 10: Profile Field Attribute Icons

	ProfileCourier Optional Field
	Database Required Field
	ProfileCourier Required Field
	ProfileCourier Secure Field
	ProfileCourier Required Secure Field
	ProfileCourier Display Only Field

Fields Displayed

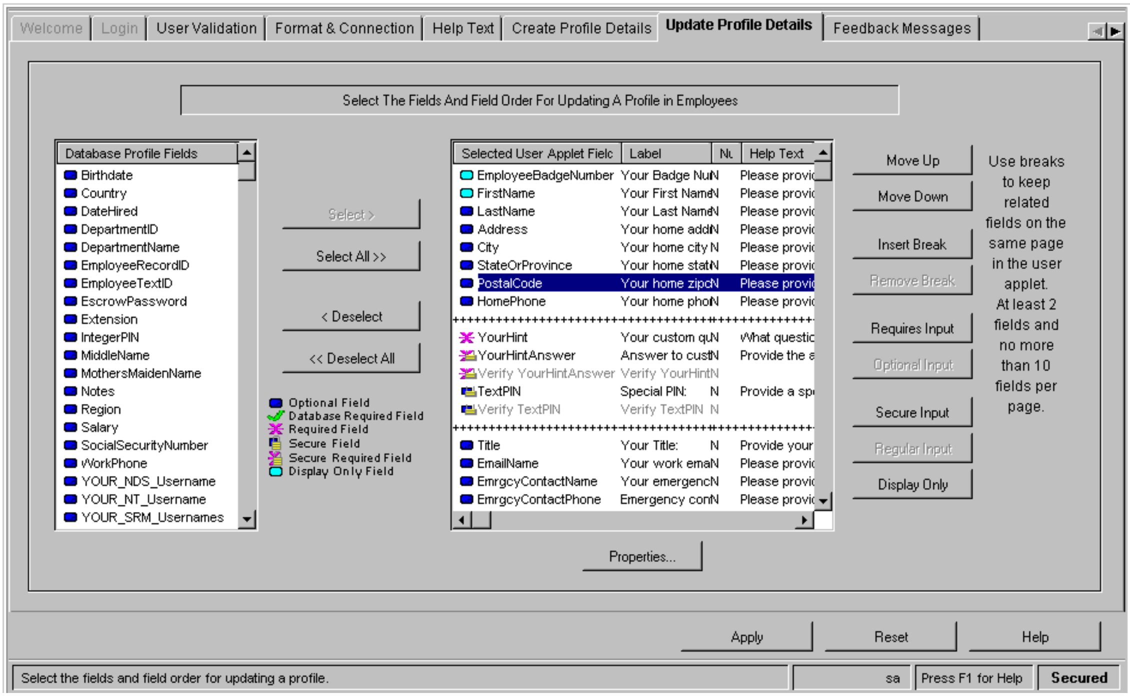
The basic layout of the tab is shown in *Figure 11*. Fields in the left-hand list are those from the profile table that are **not** displayed in ProfileCourier. Fields in the right-hand list are displayed. The four buttons between the two lists are used to move fields from one list to the other.

The **Select All >>** button moves all fields from the left-hand list to the selected list on the right.

The **<< Deselect All** button moves all fields from the right-hand list to the unselected list on the left.

1. To select one or more fields for inclusion in ProfileCourier choose the field by clicking on it.
2. Select multiple fields by holding down the **CTRL** key and clicking on each field desired or select a range of fields by holding down the Shift key and clicking on the first and last fields in the range.
3. Click the **Select>** button to complete the selection.
4. To deselect a field choose the appropriate field from the right-hand list and click the **< Deselect** button.
5. For multiple selections, as described above, use the **CTRL** and **Shift** keys.

Figure 11: Selecting fields in Update Profile Details Tab

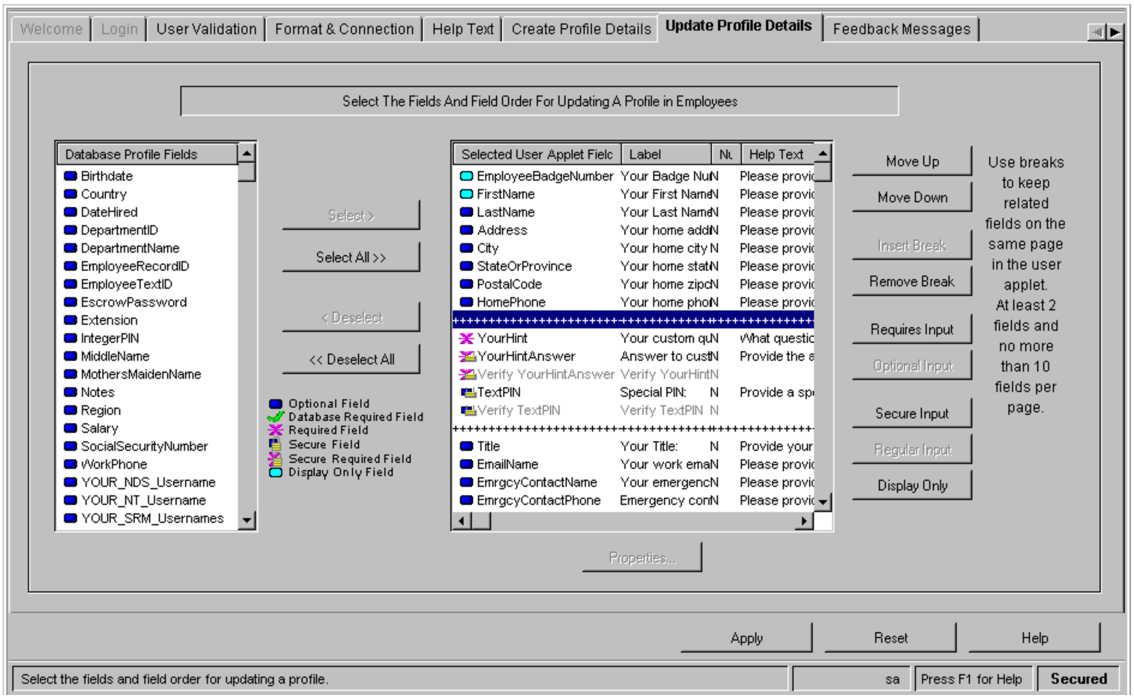


Page Breaks

ProfileCourier allows administrators to configure how many and which fields will be presented to the end user on each page by inserting page breaks. ProfileCourier allows the end user to move through these pages with the **NEXT** buttons. (The **BACK** button on the browser allows the end user to return to the previous screen.) The **CLEAR FIELDS** button allows the end user to clear all fields on that page.

1. To insert a page break before a field, select that field and click the **INSERT BREAK** button (*Figure 12*).
2. To remove a page break, select the page break (the line of **+** symbols) and click the **REMOVE BREAK** button.

Figure 12: Inserting Page Breaks in Update Profile Details Tab



Required Fields

The fields in the **Selected User Applet Fields** column can be set as optional or required. Fields marked with a dark blue box indicate optional fields. The end user is not required to fill in values for these fields to successfully complete the profile management process. Fields marked with a purple asterisk indicate required fields. The end user must fill in values for these fields to successfully create a profile.

1. To change a field from optional to required, select the field and click the **Requires Input** button. Multiple fields may be selected at the same time. The symbol is automatically updated.
2. To change a field from required to optional, select the field and click the **Optional Input** button. More than one field may be selected. The symbol is automatically updated.

   Note: Fields of data type date or date-time must be marked as required.

Field Order

The order in which fields are shown in ProfileCourier is customizable.

1. To move a field to a different position on the page, click it and click the **Move Up** or **Move Down** button. Multiple fields may be selected and moved as a group by using the **CTRL** or **Shift** keys. The list automatically adjusts to show the changes.
2. Page breaks may also be moved with the **Move Up** and **Move Down** buttons.
3. Verification fields move automatically with their corresponding secure, hashed, or encrypted fields.

Field Attributes

The fields in the **SELECTED USER APPLET FIELDS** column on the right can be marked as secure, regular, or display-only.

- **Secure/Optional** — Fields marked by a dark blue box with a yellow lock indicate secure optional fields. For security reasons, information is displayed with asterisks and not clear text.
- **Secure/Required** — Fields marked by a purple asterisk with a yellow lock indicate secure required fields. The end user must fill in values for these fields. For security reasons, information is displayed with asterisks and not clear text.
- **Secure and Clear Text** — To change a field's input from clear text to secure, select the field and click the **SECURE INPUT** button. To change a field from secure to clear text, select the field and click the **REGULAR INPUT** button. Multiple fields may be selected. Required and optional characteristics remain as indicated. The symbol is automatically updated.

  Note: Fields that have a fixed list of possible answers or that are date, time, or date/time fields cannot be marked for secure input.

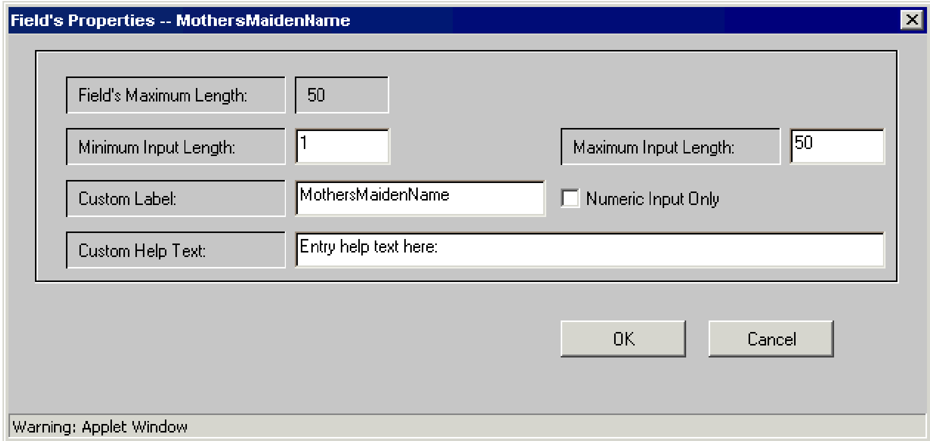
  When a field is newly marked as secure, a verification field is added to the list of selected fields. This verification field is tied to the secure field and cannot be selected independently. It moves up or down automatically with the secure field. Other fields or page breaks are prevented from being placed between a secure field and its verification field and instead move above or below the pair of fields as if they were a single field. Hashed/Message digest fields have a verification field automatically added when they are moved to the list of selected fields.
- **Display-Only** — This attribute is available in the Update Profile Details tab only. Display-Only fields are marked with a light blue box. To change a field from regular to Display-Only, select the field and click the **DISPLAY-ONLY** button. More than one field may be selected at a time. Required fields cannot be marked Display-Only.

  To change a field from Display-Only to regular, select the field and click the **REGULAR INPUT** button. More than one field may be selected.

Field Properties

For additional customization of ProfileCourier, highlight a field from the selected fields list and then click the **PROPERTIES** button to display the Field's Properties window (*Figure 13*). The **PROPERTIES** button may only be used with one field at a time.

Figure 13: Customizing Field Properties



- **Field's Maximum Length** — The maximum character length of the field as specified in the data source. This value cannot be modified in ProfileCourier. The value specified for **Maximum Input Length** cannot exceed this value.
- **Minimum Input Length** — The minimum character length feature, which applies to text fields only, is supported in both secure and nonsecure field types. After entering the data in the minimum field, click the **OK** button to confirm the minimum field.
- **Maximum Input Length** — The maximum character length feature, which applies to text fields only, is supported in both secure and nonsecure field types. After entering the data in the maximum field, click the **OK** button to confirm the maximum field.

  In a nonsecure field the end user is not allowed to exceed the maximum number of characters. In a secure field, the character length is not checked until the end user enters the data and clicks on the **Next** or the **Finish** button. If more characters have been entered than the field supports, an error message appears.

  Note: The Maximum and Minimum length configuration fields are not displayed unless the default values are modified by clicking the **Details** button.
- **Custom Label** — The Field Properties Dialog allows administrators to define the custom field label.

  Since the total combined space for the field's label and value is limited, an exceedingly long label could cause the field for the value to be hidden.

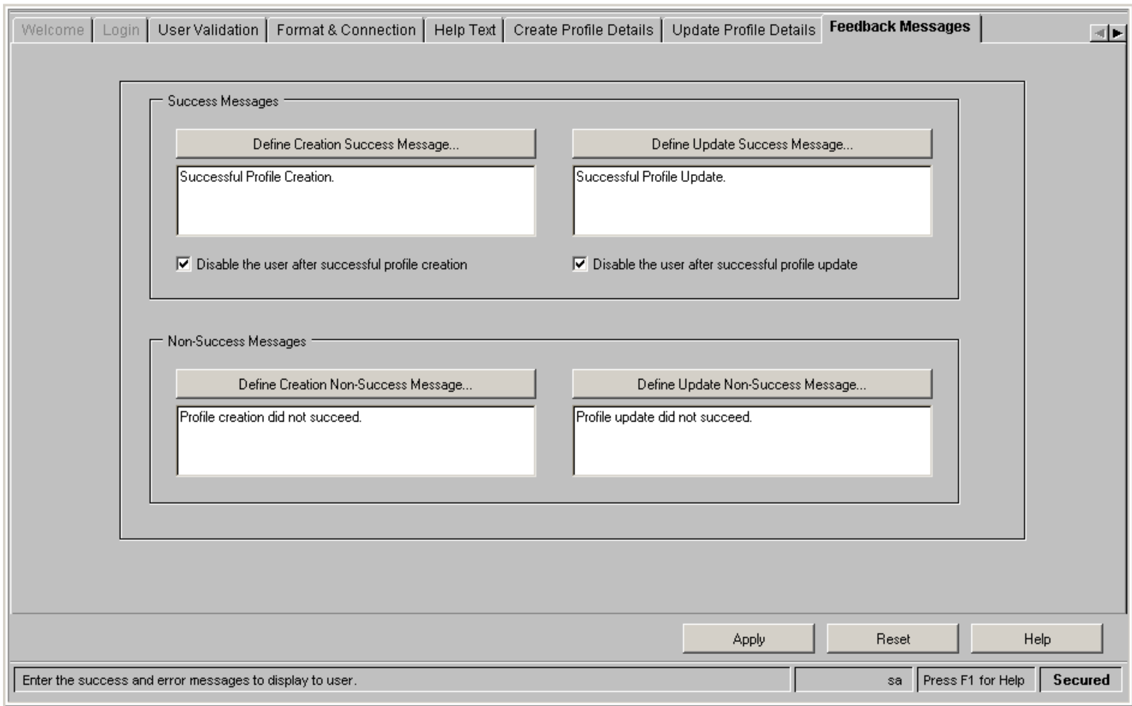
  Verification fields for secure fields do not have customizable labels and help text. Instead, they inherit their information from the associated secure field. The label for the verify field is **Verify** followed by the custom field label for the secure field.
- **Numeric Input Only** — If a field is defined by the data source as a text field, it is possible to force end users to enter only numbers into this field by clicking on the **Numeric Input Only** check box. This check box is only enabled if the selected field is a text field. If the secure field has been customized to require numeric entries, then the verify field will also require numeric entries.
- **Custom Help Text** — The help text for the verify field is the same as the help text for the secure field. The help text is displayed when ProfileCourier is running and the mouse is over the help icon of the associated field.

Note: Click the **Apply** button to save settings before moving to another tab. Click the **Reset** button to return all fields to their previously saved settings.

Feedback Messages Tab

Feedback Messages allow customization of the message that end users receive after completing their data entry into ProfileCourier (*Figure 14*).

Figure 14: Feedback Messages Tab

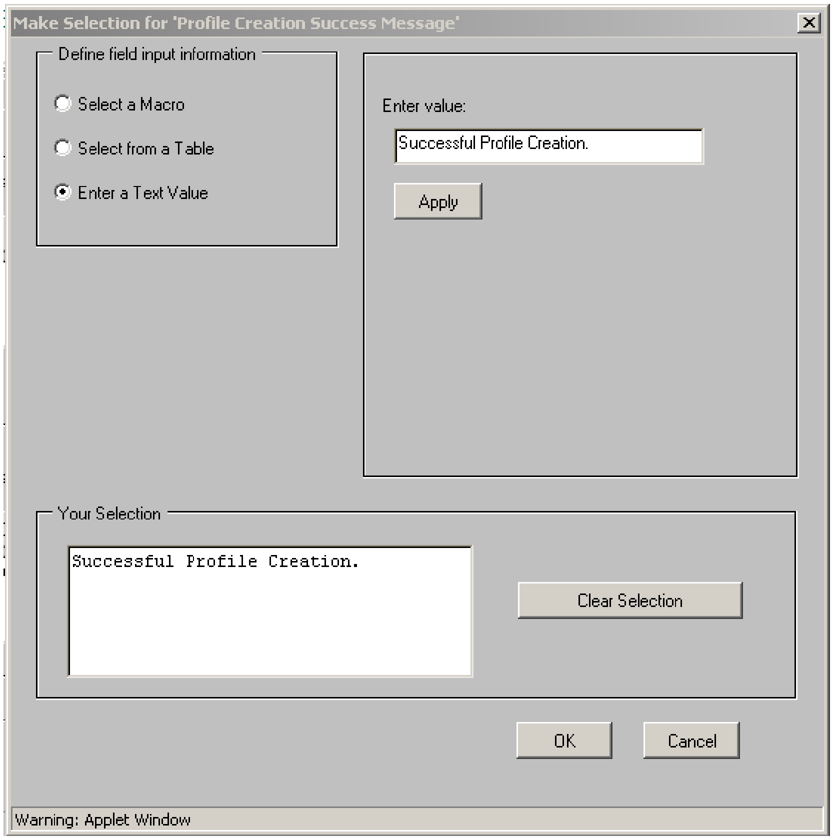


This tab includes four buttons to configure feedback messages after one of four specific events takes place:

- **Define Creation Success Message** — This message is displayed to the end user after a successful profile creation using ProfileCourier.
- **Define Creation Non-Success Message...** — This message is displayed to the end user after an unsuccessful profile creation using ProfileCourier.
- **Define Update Success Message...** — This message is displayed to the end user after a successful profile update using ProfileCourier.
- **Define Update Non-Success Message...** — This message is displayed to the end user after a non-successful profile update using ProfileCourier.

Feedback messages can contain text, macros, or information selected from the data source. When one of the four buttons is clicked, a dialog box allows administrators to select from a list of supported macros and build a select statement, select input from a table, or enter text (*Figure 15*). Custom feedback messages can contain a mixture of these items.

Figure 15: Message Dialog Box



The Feedback Messages tab also allows the administrator to prevent end users from altering profile information once it has successfully been entered. To ensure that no one can subsequently use ProfileCourier to change data after the successful creation or update of an end user profile do one or both of the following:

- Select the **DISABLE THE USER AFTER SUCCESSFUL PROFILE CREATION** check box to disable end users who have successfully created their end user profile from using ProfileCourier.
- Select the **DISABLE THE USER AFTER SUCCESSFUL PROFILE UPDATE** check box to disable end users who have successfully updated their profiles from using ProfileCourier.

Note: Click the **APPLY** button to save settings before moving to another tab. Click the **RESET** button to return all fields to their previous settings.

Request Tracking Tab

If the Request Tracking tab (*Figure 16*) is not visible at the top of the window, click the right arrow to the right of the row of tabs.

ProfileCourier can be configured to track profile creation, updates, and other activities. Auditing actions may be configured to occur with the following:

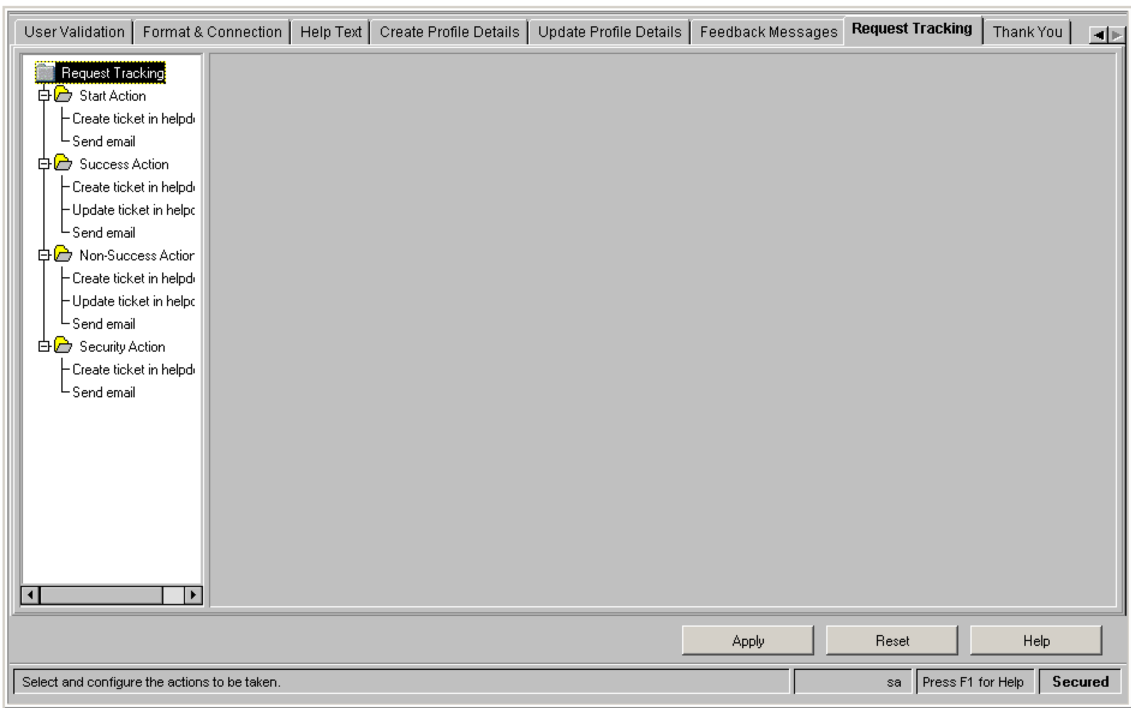
- Start Action — a validated and authenticated end user initiates a ProfileCourier session.

- Success Action — a successful profile creation/update occurs.
- Non-Success Action — a nonsuccessful profile creation/update occurs.
- Security Action — an end user exceeds the configured number of attempts to validate or authenticate himself.

The auditing actions that can be configured to optionally occur are:

- Create a ticket.
- Update a ticket.
- Send an e-mail.

Figure 16: Request Tracking Tab



Note: Only one ticket is created during any one use of ProfileCourier for a profile creation or update.

ProfileCourier can be configured to optionally create tickets in the Help Desk system in the following situations:

- Exceeding the configured number of end user validation or authentication attempts
- Initiation of profile update after end user validation and authentication
- Successful profile creation/update
- Non-Successful profile creation/update

If the Help Desk system supports ticket generation via an e-mail message, ProfileCourier can be configured to send an e-mail to create the ticket in the Help Desk system.

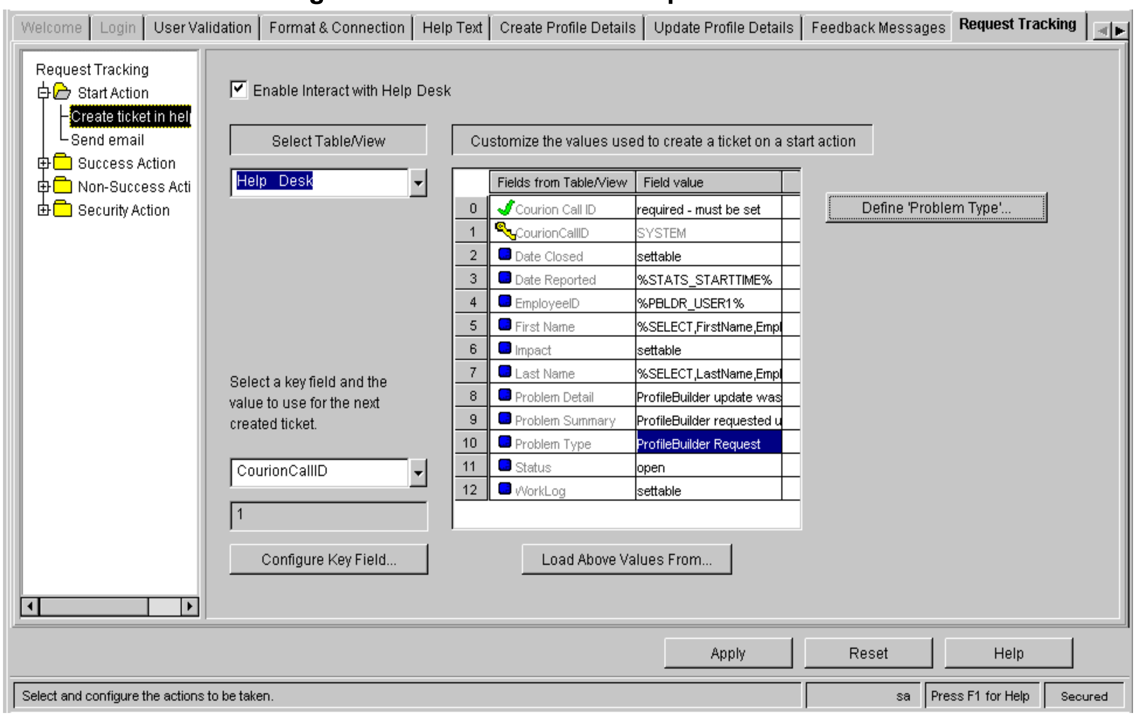
Start Action

A Start Action occurs when an end user performs a successful validation and authentication and the profile creation or update activity begins.

Create a Ticket in Help Desk on a Start Action

The ProfileCourier Customization Manager allows administrators to configure ProfileCourier to create a Help Desk ticket (*Figure 17*).

Figure 17: Create Ticket in Help Desk Screen



The contents of the ticket fields may be set by entering any combination of macros containing information gathered by ProfileCourier, with information held in a data source, or with text. ProfileCourier enters this information into a single Help Desk data source table after the end user has been successfully validated.

1. From the **SELECT TABLE/VIEW** (or **SELECT TABLE** depending upon the Help Desk application being used) drop-down list on the left side of the Create Ticket frame, choose the Help Desk data source table where ProfileCourier is to enter information.

   This list of tables is created dynamically, and updates in the data source structure are reflected whenever the Courion Server is restarted.

   Note: Depending on which Help Desk application ProfileCourier is using, the field labeled **SELECT A KEY FIELD AND THE VALUE TO USE FOR THE NEXT CREATED TICKET** and the **CONFIGURE KEY FIELD...** button may not be visible. Please see the appropriate Help Desk Integration Guide for additional information.

Ticket Table Key Field

If ProfileCourier is being configured to use ODBC as the ticketing data source then it is necessary to select a ticket ID key field after choosing a table. Select the ticketID key field from the drop-down menu located below the **SELECT A KEY FIELD AND THE VALUE TO USE FOR THE NEXT CREATED TICKET** text the lower left corner of the **CREATE TICKET** screen.

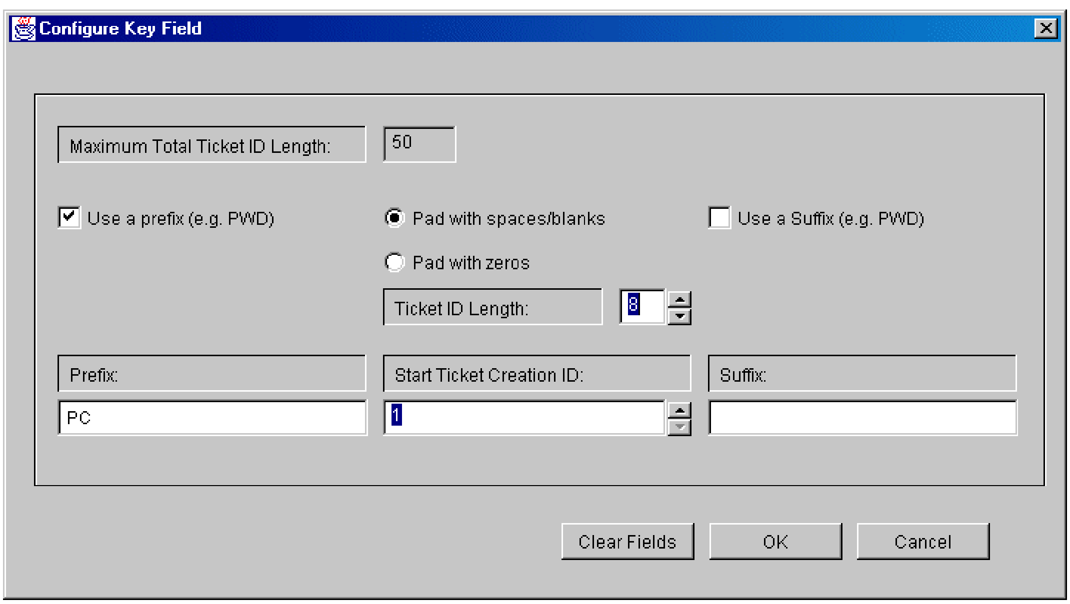
Note: Please see the appropriate *Help Desk Configuration Guide* for additional information on Ticket Table Key Field configuration.

For ODBC installations, the starting ticket number must be specified in the field below the **TICKET ID KEY FIELD** field. If the selected key field is numeric, then a spin control is presented below the field selection control. The field is initialized with the next sequential record identifier in the table. To modify the starting number to create ticket records, change the integer value by either typing directly in the field or by clicking on the up and down buttons on the right to increment/decrement the number.

Note: The **CONFIGURE KEY FIELD** button is disabled (*Figure 17*) since, with the exception of the starting number, numeric fields are not configurable for various Help Desk applications.

If the selected key field is text, this field may be customized to conform to the requirements for a company's ODBC Help Desk. Click the enabled **CONFIGURE KEY FIELD** button and the Configure Key Field dialog box appears (*Figure 18*).

Figure 18: Configure Key Field Screen



This dialog allows the customization of the ticket ID so that it conforms to any requirements the ODBC Help Desk may have. For example, some Help Desks have a ticket ID that is 10 characters long and right justified (e.g. 0000000001 rather than 1). Even if a Help Desk has no special requirements, this field should be customized to easily identify ProfileCourier created tickets. This can prevent collision with other sources that may create tickets outside of ProfileCourier. For example, if the ProfileCourier configuration is limited to specifying that Start Ticket begins creation at ID number 2, another user may use the Help Desk directly and create the next ticket as 3. Since ProfileCourier has no knowledge of tickets created by other sources, it attempts to create the next ticket as 3 and fails. To avoid this, use a prefix and/or a suffix that makes ProfileCourier ticket IDs unique.

For example, in Figure 15, a prefix of PC is used with spaces as padding. Since the prefix specified is PC and the length of the ID is 8, the end result is a ticket ID starting with PC plus 7 spaces for padding, followed by the ticket id that was configured to be 1. Subsequent tickets also begin with PC and increment from 1. A suffix may also be used so that all ProfileCourier created ticket IDs end with the same text. Zeros may be also used as padding. The length of the ticket ID along with the prefix and suffix cannot exceed the Maximum Total Ticket ID length displayed at the top left hand corner. Click the **CLEAR FIELDS** button to clear all fields.

Customizing Ticket Table Fields

The table located in the center of the Create Ticket in Start Action frame displays the fields located in the selected ticket table. The middle row of icons and field definitions that indicate which fields are optional ("settable"), which are required ("required - must be set"), or predetermined. ProfileCourier uses these field definitions to enter information into the Help Desk data source during ticket creation.

Figure 19: Ticket Field icons

	Red "x"	System field
	Green check mark	Required field
	Dark blue box	Optional field
	Dark blue box with red "x"	Optional field - not changeable
	Yellow key	Key

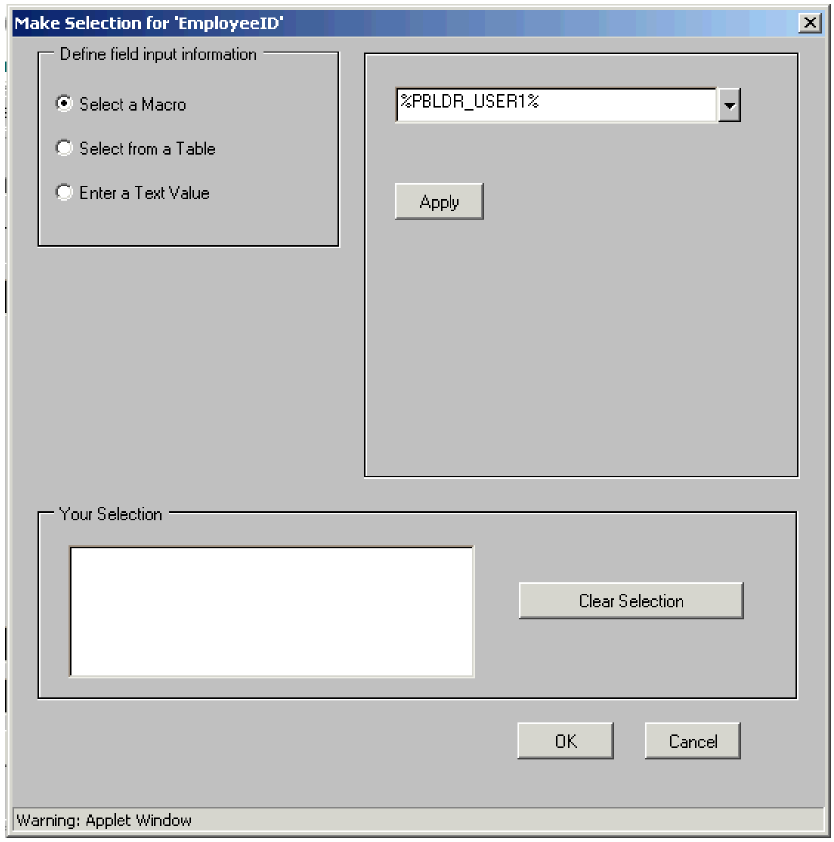
To configure ProfileCourier to enter information into a field, select the field in the **CUSTOMIZE THE VALUES USED TO...** table (*Figure 17*) by clicking on the row number with the mouse. ProfileCourier Customization Manager applies the field constraints to the selected entry to ensure that ProfileCourier is not configured to enter invalid information into the Help Desk system (for example, entering alphabetic character data into a numeric field). If the selected field has a specific set of entries from which to choose from a drop down box of valid entries is provided from which to select.

In fields without specific value constraints, it is possible to select macro information gathered by ProfileCourier, specify information from another field in the Help Desk data source, enter text, or any combination of these sets of data. If the selected field has already been defined and is again selected to be modified, the current value is displayed in the field under the **DEFINE...** button. Click the **DEFINE...** button. If the current value is present, it is displayed in the bottom text field of the dialog that pops up.

Macros

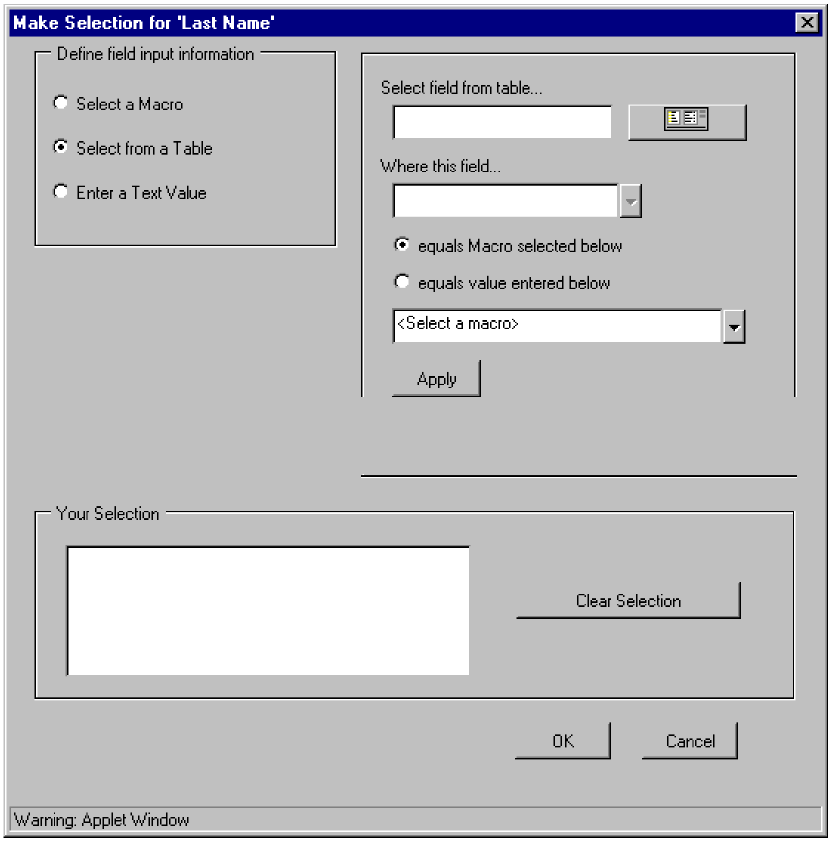
If the field does not have specific valid value constraints, administrators may choose to select macro information gathered by ProfileCourier. Administrators can also elect to specify information from another field in the Help Desk data source, enter text, or use any combination of these sets of data (*Figure 20*). If the selected field has already been defined and is again selected to be modified, the current value is displayed in the field under the **DEFINE...** button. Click the **DEFINE...** button. If the current value is present, it is displayed in the bottom text field of the dialog that pops up.

Figure 20: Entering Macro Information into a Ticket Field



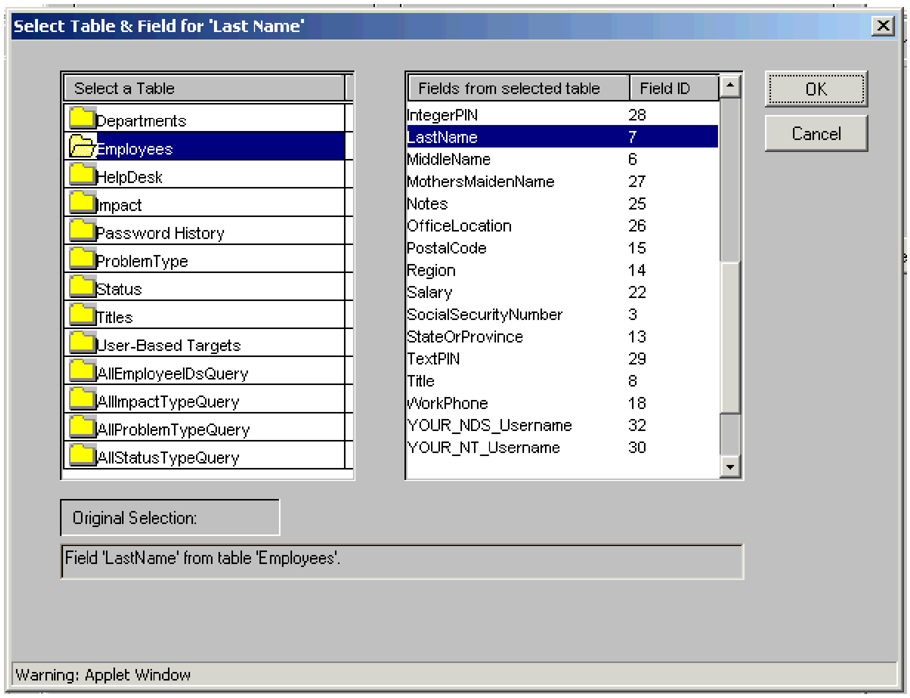
1. Select a macro, information from another field in the Help Desk data source or enter text. This selection is added to the bottom text field when the **Apply** button is clicked. To clear the bottom text field, click the **Clear Selection** button. The bottom text field may be edited.
2. Click the **Select a Macro** radio button to enter a macro and choose one of the macros of ProfileCourier information from the pull down menu (*Figure 20*). As they reflect the number of end user validation fields and the use of comments field defined in the ProfileCourier Customization Manager, some of the %PBLDR_USERn% macros may be disabled.
3. Click the **Select from a Table** radio button to select information from another field in the Help Desk system data source (*Figure 21*).

Figure 21: Select Data from a Table to Enter in Ticket Field



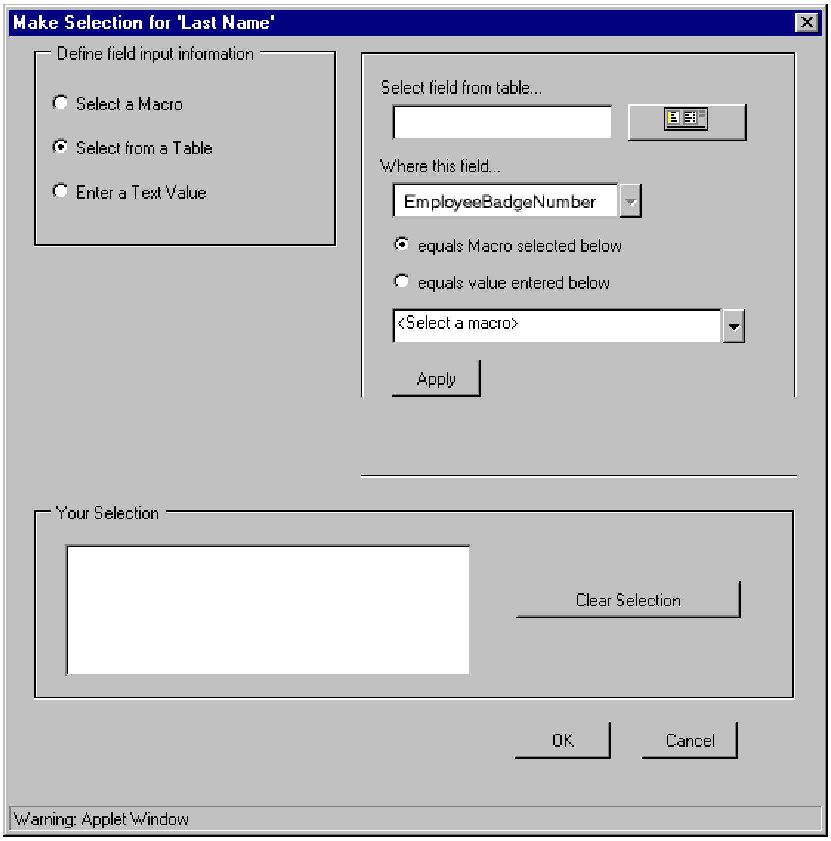
4. Choose the field from the Help Desk data source table to be imported into the trouble ticket and by clicking the **Select Field from Table** button.
5. Click the **OK** button. A **Select Table & Field** dialog box appears (*Figure 22*).
6. Click on the table and then on one field to import into the trouble ticket.

Figure 22: Ticket Input, Table & Field Selection



7. From the drop down list, choose the field in the Help Desk data source table that contains the key for the selection from the data source; this should be a field with a unique value for each profile. For example, import an end user's last name based on the key of EmployeeBadgeNumber equal to the end user's entry in the EmployeeBadgeNumber field (*Figure 23*).

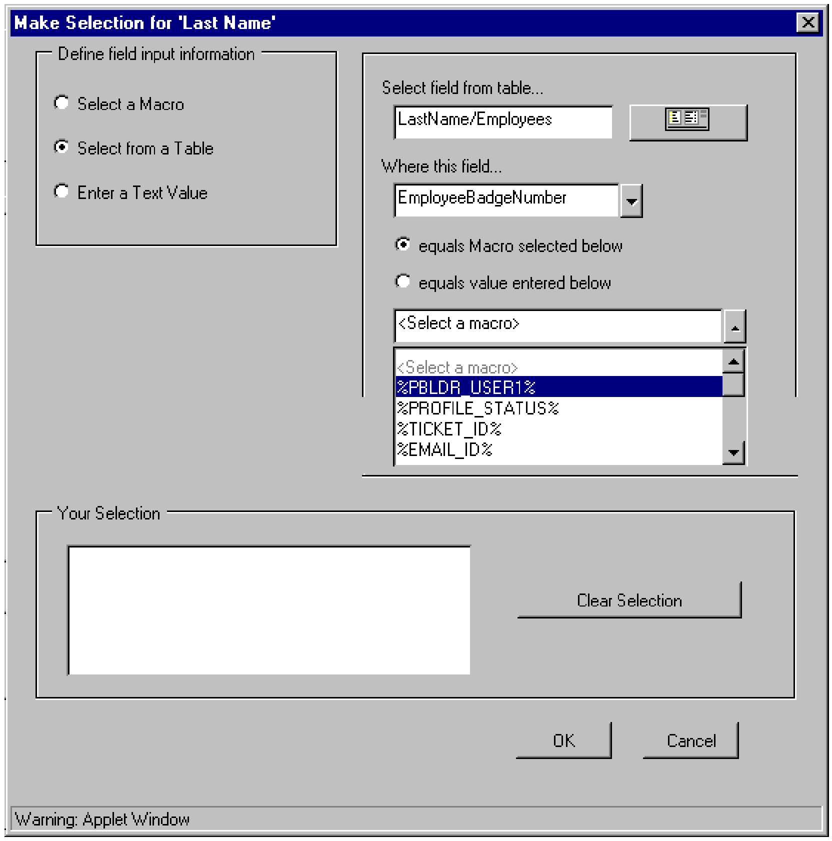
Figure 23: Choose a Key for Selecting Data for a Ticket Entry



8. After the key field is chosen, enter the desired value. Enter either a macro of information held by ProfileCourier or customized text.

   Figure 24 illustrates the use of a macro that contains the end user's information for the first end user validation field, **USER'S LAST NAME**.

Figure 24: Finishing Data Selection for Ticket Entry



ProfileCourier displays the selection in the text field at the bottom of the dialog box after the **APPLY** button is clicked.

The defined information is appended to what is already presented on the bottom text field. To replace existing information, click the **CLEAR SELECTION** button to clear the bottom text field. Click the **OK**” button and the Create Ticket tab is returned. The new selection is applied to the ticket.

If entering text, enter it at the prompt and click the **APPLY** button to move it to the bottom text field or type directly into the bottom text field. The **RESET** button sets all fields back to their previous value.

For example, to enter text such as "ProfileCourier" in a field that contains the "Help Desk representative," click the **APPLY** button for the new selection to be applied and saved to the selected field in the list box for the configuration.

ProfileCourier supports dual datasource functionality for ticketing. To write authentication information to the ticket, modify the %SELECT...% statements in the ticket to include the word “Authentication” (without quotation marks), to specify that the information will come from the authentication datasource. "Authentication" allows you to configure ProfileCourier to use %SELECT to pull information from the profile datasource and use it in the ticketing datasource. For example, to read the first name field from the authentication table and put this information in the first name field of the ticket, where the first piece of validation information is a badge number, use a statement similar to the following:

```
%SELECT,Authentication,FirstName,Employees,EmployeeBadgeNumb
er,|PWDCOUR_USER1|%
```

Note: You can also use "Ticketing" with %SELECT. This keyword allows you to configure ProfileCourier to use %SELECT to pull information from the ticketing datasource and use it in the profile datasource.

The ProfileCourier Customization Manager allows administrators to move from the Request Tracking tab without entering valid data for all required fields. However, if there are required fields that have not been configured, end users receive error messages during their use of ProfileCourier when a ticket creation is attempted (*Figure 25*). ProfileCourier allows movement to another tab without completion of configuration because administrators may need to refer to configurations in other tabs.

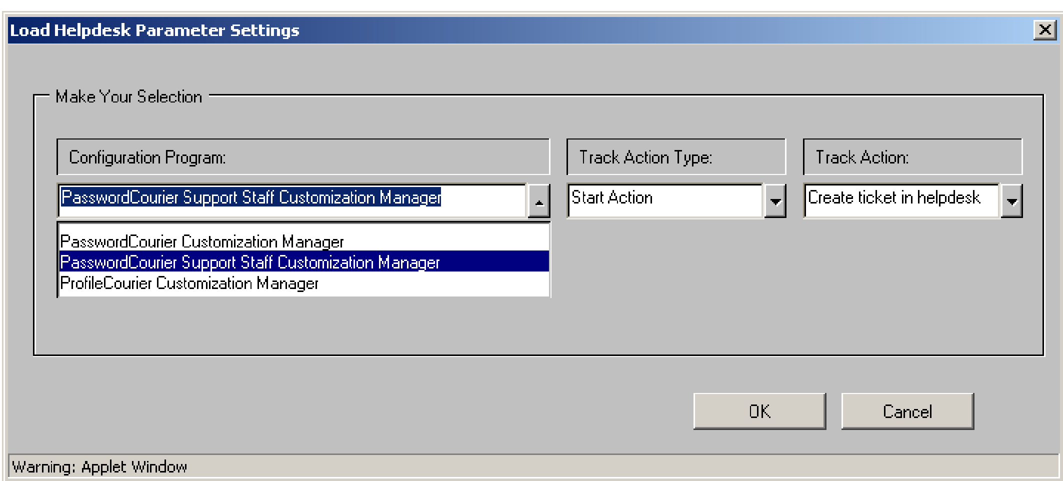
Figure 25: Not All Required Fields Defined Status

Load Values from Another Tab dialog

The values in ProfileCourier Customization Manager Request Tracking tab's center grid can be loaded from a related tab in the PasswordCourier Customization Manager's Request Tracking tab or from the PasswordCourier Support Staff Customization Manager's Request Tracking tab. This feature works when the table names for the source "load from" and to the selected destination page have the same table name. If the names do not match, this functionality will not work. For example, as long as the same table is selected, an Interact with Help Desk tab can have values from another Interact with Help Desk tab. This is also true of values from any Send e-Mail tab to another Send e-Mail tab.

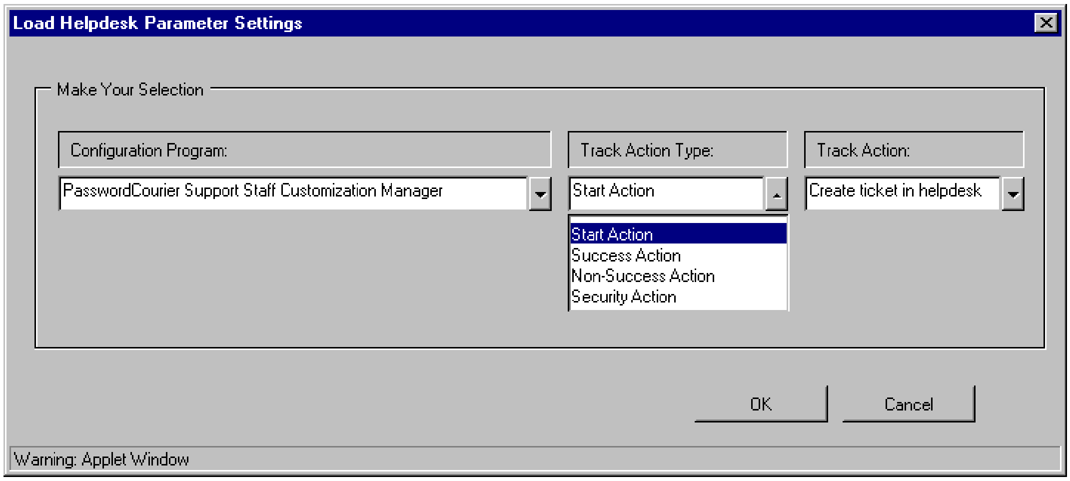
To use this functionality, go to the tab into which those values will be loaded. Below the center grid is a button labeled "**LOAD ABOVE VALUES FROM...**" Click the button and a dialog appears (*Figure 26*).

Figure 26: Load Values from Above Screen



1. Select the Customization Manager to load from. Next, select the Track Action Type: Start Action, Success Action, Non-Success Action, or Security Action (*Figure 27*).

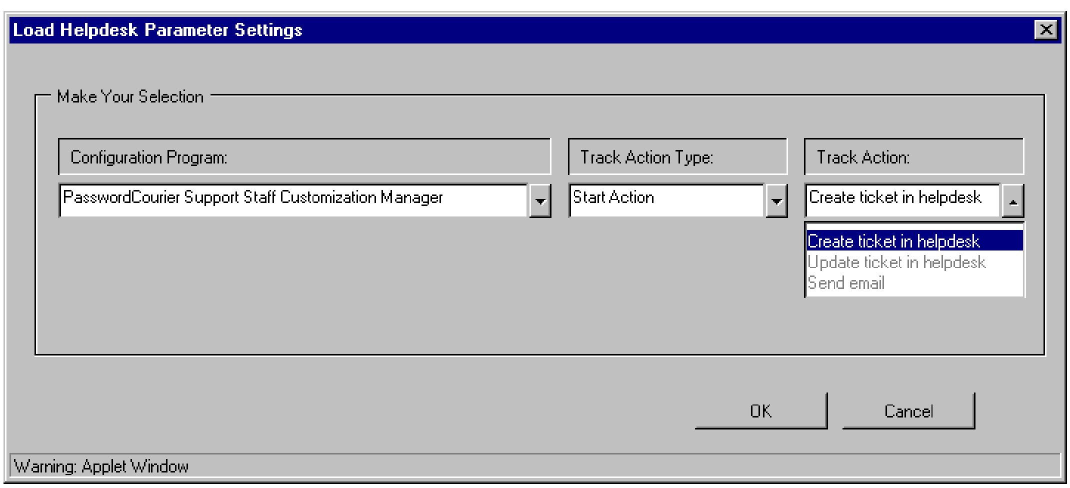
Figure 27: Load Values from Above Select Track Screen



2. Select the Track Action, which varies depending upon the type of selected Track Action Type. For example, it is not possible for a administrative user to select the Send e-Mail action from the "Interact with Help Desk" tab. In the same manner, it is not possible to select an "Interact with Help Desk" action from the "Send e-mail" tab; nor is it possible to select "Update ticket in Help Desk" from the "Start Action" or "Security Action" tab (*Figure 28*).

   Note: A Start message is only displayed if the Interact with Help Desk option is selected.

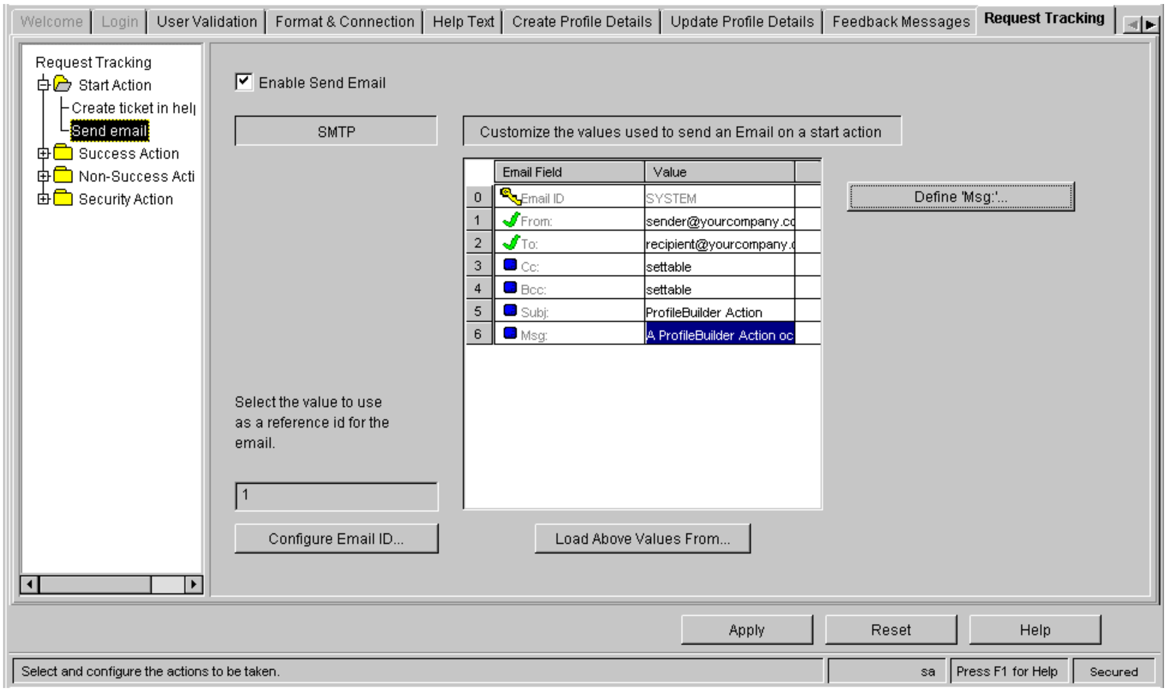
Figure 28: Load Values from Above Select Track Action Screen



Send e-Mail on Start Action

The ProfileCourier Customization Manager enables the Courion Server to send e-mail messages through the Request Tracking tab (*Figure 29*).

Figure 29: Send e-Mail on Start Action Screen



The following e-mail values can be preconfigured:

- From
- To
- Cc
- Bcc
- Subject
- Msg

E-mail configuration can only be enabled if the SMTP server configuration is completed as part of the Courion Server configuration. To configure these fields, select the "**Enable Send E-mail**" checkbox. The e-mail fields are configured in the same manner as the **Create ticket in Help Desk** fields.

Success Action

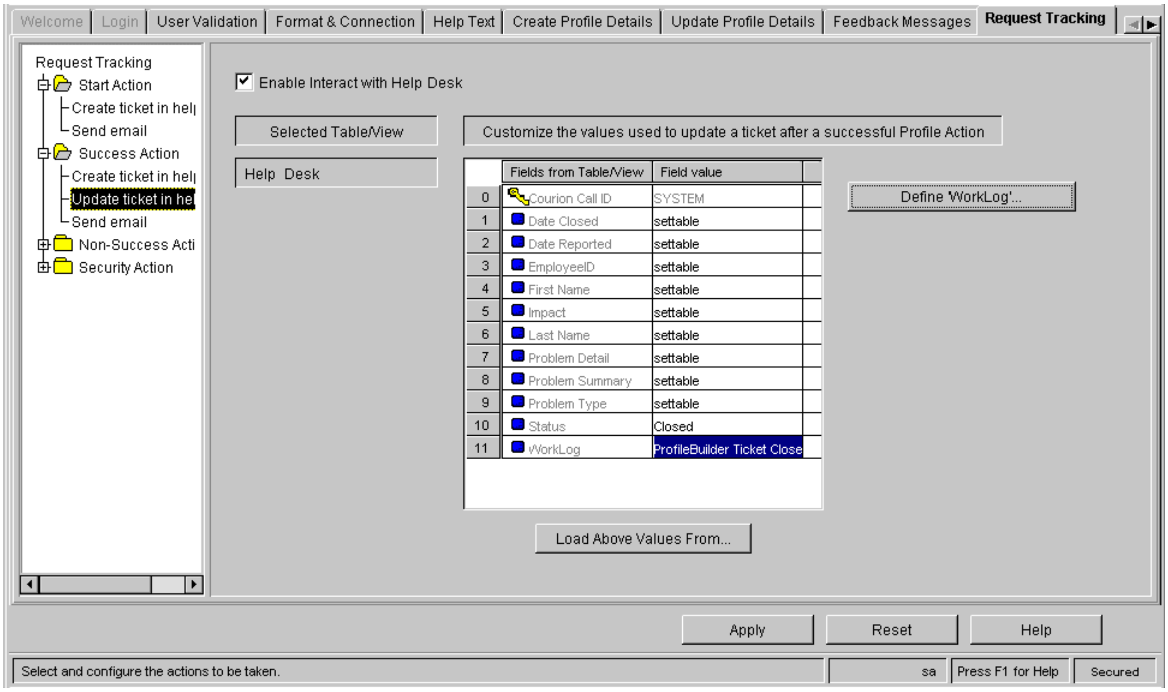
Create Ticket in Help Desk on Success Action

A Success Action is the successful creation or update of a profile. ProfileCourier can be configured to create a ticket in the Help Desk system (if one wasn't created in the Start Action) upon a Success Action. See *"Create a Ticket in Help Desk on a Start Action" on page 28* for configuration instructions.

Update Ticket in Help Desk on Success Action

After the end user has completed successful profile creation or update, ProfileCourier updates the ticket with the additional information configured in this tab (*Figure 30*). Click the **Apply** button to save the configuration. The **Reset** button sets all fields back to their previous value.

Figure 30: Update Ticket in Help Desk on Success Action Screen



Send e-Mail on Success Action

See *"Send e-Mail on Start Action" on page 37* for configuration instructions.

Non -Success Action

A Non-Success action takes place when an attempt to create or update a profile is unsuccessful.

The three Non-Success conditions that could occur are:

1. The profile creation, if attempted, failed.
2. The profile update, if attempted, failed.
3. The end user canceled out of a ProfileCourier session after a start action.

Create Ticket in Help Desk on Non-Success Action

ProfileCourier can be configured to update the ticket created in the Start Action or create a ticket in the Help Desk system (if one wasn't created in the Start Action) on a Non-Success action. See *"Create a Ticket in Help Desk on a Start Action" on page 28* for configuration instructions.

Update Ticket in Help Desk on Non-Success Action

If the end user submits the profile create/update and a nonsuccessful result occurs, ProfileCourier updates the ticket with the additional information configured on this screen. Click the "Apply" button to save the configuration. The "Reset" button sets all fields back to their previous value. See *"Update Ticket in Help Desk on Success Action" on page 38* for configuration instructions

Send e-Mail on Non-Success Action

See *"Send e-Mail on Start Action" on page 37* for configuration instructions.

Security Action

Create Security Ticket in Help Desk on Security Action

If an end user exceeds the maximum number of end user validation or end user authentication attempts, ProfileCourier disables the end user from using ProfileCourier and creates a Security Incident trouble ticket. ProfileCourier can be configured to create a ticket in the Help Desk system on a security action. See *"Create a Ticket in Help Desk on a Start Action" on page 28* for configuration instructions.

Send e-Mail on Security Action

See *"Send e-Mail on Start Action" on page 37* for configuration instructions.

Notes Warnings and Limitations

- Numerical values that include a decimal point require zeros for padding. For example: Desired value = 1234.56; Entry value = 00001234.560. Due to the attributes of the field in the profile data source, the number of zeros may vary.
- If the Courion Server is changed to run as a Windows NT® account other than LOCALSYSTEM, it is necessary to make sure the account has full control of the Courion Server folder, its files, and the registry keys under CourionPasswordCourier in the LOCAL_MACHINE/SYSTEM/CurrentControlSet/Services.
- There is a known problem with creating and updating profiles in Remedy® Action Request System®. Because fields in Remedy cannot be cleared, even if they are marked as optional, on the Create Profile Details or Update Profile Details tabs, all character fields to be displayed should be marked as required. This will prevent end users from receiving error messages associated with fields with empty values. **Note:** End users who use ProfileCourier to view their profiles but who do not make any changes do not receive these error messages.
- When initially creating a profile on iPlanet™ Directory Server, do not use the userpassword field in the creation of the profile. The profile will be created, though the status will be flagged as nonsuccess.

ProfileCourier Server Macros

Macros are available for substituting information gathered by the Courion Server into Access Assurance Suite products. The Courion Server not only gathers information entered by the end user, but it also collects statistics on the use of the product. This may be useful for tracking service level performance.

Note: some macros are not assigned values until after requests have been attempted. If a macro of this kind is used for substitution before it has a meaningful value, the value “<<macro has no value>>” is substituted for the macro.

ProfileCourier Macros

The following is a list of supported macros:

Table 1: ProfileCourier Macros

Macro Name	Description	Availability		
		Profile Update - User Validation	Profile Create - Feedback	Profile Update - Feedback
%PBLDR_USER1%	User validation field 1 in input.	Yes	No	Yes
%PROFILE_STATUS%	The status of the profile create or update request. Values may be SUCCESS, or FAILURE. This macro's value usually ends with a period. There is no need to include a period after specifying this macro.	No	Yes	Yes

Courion Server Common Macros

The following is a list of supported macros:

Table 2: Courion Server Common Macros

Macro Name	Description	Availability		
		Profile Update - User Validation	Profile Create - Feedback	Profile Update - Feedback
%TICKET_ID%	The Ticket ID of the ticket created by the Help Desk for the request. If an e-mail is sent instead of creating a ticket at the Start Action, the e-Mail Reference ID is returned.*	No	Yes	No
%EMAIL_ID%	The e-Mail ID of the e-mail sent during the start action.*	No	Yes	No
%CLIENT_IP_ ADDR%	IP address of the end user client.	Yes	Yes	Yes
%CLIENT_ HOST_NAME%	Host name of the client system running the end user client.	Yes	Yes	Yes
%CLIENT_ APP_NAME%	The name of the client type (e.g., ASP, GINA, Java).	Yes	Yes	Yes
%STATS_ STARTTIME%	Displays the start action time.	No	Yes	Yes
%STATS_ ENDTIME%	Displays the end time after a profile is successfully created or updated.	Yes	No	Yes
%STATS_ DURATION%	Displays the duration in seconds from user validation to completion of profile creation or update.	Yes	No	Yes

See “Macro Dependencies” on page 44.

Table 3: ProfileCourier Macros: Ticketing

Macro Name	Description	Availability		
		Ticketing not Preconfigured	Profile Create - Feedback	Profile Update - Feedback
%TICKET_ID%	The Ticket ID of the ticket created by the Help Desk for the request. If an e-mail is sent instead of creating a ticket at the Start Action, the e-Mail Reference ID is returned.*	No	Yes	Yes
%EMAIL_ID%	The e-mail ID of the e-mail sent during the start action.*	No	Yes	Yes

See “Macro Dependencies” on page 44.

Macro Dependencies

Table 4 lists macros with dependencies that affect their availability.

Table 4: Macro Dependencies

Macro Name	Dependency
%TICKET_ID%	Macro availability depends on the Request Tracking Start Action Success, or Non Success. If no Help desk ticket is created, this macro does not have a value. If the Request Tracking Start Action (or Success or Non Success) is configured to create a Help Desk ticket, this macro contains the ID of the ticket created in the Help Desk
%EMAIL_ID%	Macro availability depends on the Request Tracking configuration.

Utilities

In this Section:

Chapter 2: PIN Generator

In this Chapter:

Overview

The purpose of this software is to provide the ability to generate and apply PIN numbers to fields supplied by Help Desk systems. E-mail notification is also provided to let affected persons know about the changes made to their database records.

Installation

PIN Generator is installed as a component of the Enterprise Provisioning Suite. Please refer to *Installing the Enterprise Provisioning Suite* for additional information.

Note: You need the correct Access Key in order to configure PIN Generator.

Configuration

Launch PIN Generator from the Windows **START** menu:

Start>All Programs>Courion Enterprise Provisioning Suite>ProfileCourier Classic>PIN Generator Utility

A wizard interface provides a guide to configure a personnel template to generate PINs and to send e-mail.

Alternatively, PIN Generator may be run in batch mode on a scheduled basis.

Type the following into the command line:

```
PINGenerator -min -file=<filename of template> -template=<name of template>
-log=<filename of log>
```

- **-min** — Run PINGen minimized.
- **-file=<filename of template>** — The equal character must be present and the filename must NOT contain spaces, e.g., PinTemplate.tpl is okay, but Pin Template.tpl is not.
- **-template=<name of template>** — Within an imported template file, there can be numerous templates. This command selects a particular one. The file name of the template must not contain spaces.
- **-log=<filename of log>** — This optional -log command writes to a separate log. The content of the log is the same information presented after a PN Generator execution with the User Interface. It logs the number of successful and unsuccessful runs of Pin Generator.

An example would be:

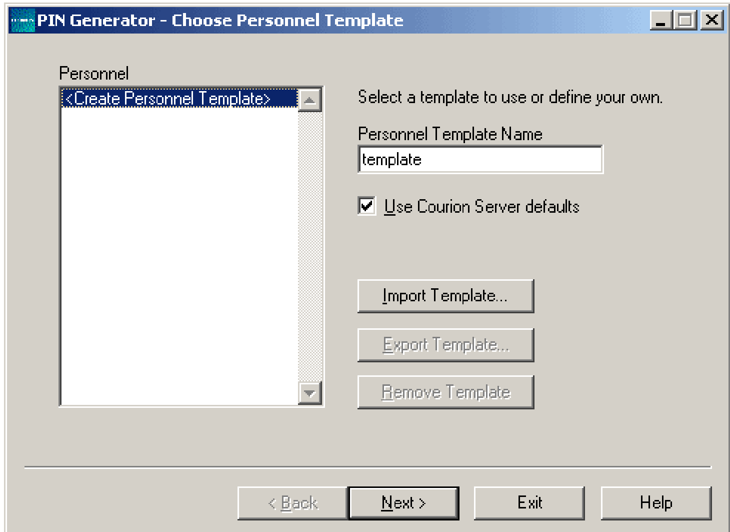
```
Pingenerator -min -file=pintemplate.tpl -template=employees -
log=background.txt
```

These commands may be entered in any order, and they are not case sensitive.

Personnel Template

The Choose Personnel Template window *Figure 31* shows all of the available personnel templates created and used by the client machine. A personnel template is a collection of information pertaining to SMTP settings, ODBC connections, employee groups, and fields designated to receive PINs. These personnel templates are initially created using this wizard screen and later saved when the wizard is completed. Defining multiple personnel templates provides a way to group settings based on ODBC data source and SMTP configuration.

Figure 31: Choose Personnel Template Window



Personnel templates may be imported or exported on this screen. This feature allows personnel templates to be individually saved and transferred to other client machines without sacrificing sensitive setting information among the different personnel templates.

Create

1. Enter the name of the new template in the **PERSONNEL TEMPLATE NAME** field.
2. Select the **USE COURIONSERVICE DEFAULTS** checkbox to retrieve Courion Server information to populate the SMTP and ODBC Database specific settings.

Modify

1. Select the template to be modified from the Personnel Templates List box.

Import

1. Click the **IMPORT TEMPLATE...** button.
2. Supply the file from which to retrieve the personnel template.

Export

1. Highlight an existing personnel template
2. Click the **EXPORT TEMPLATE...** button
3. Supply the file name in which the personnel template will be saved.

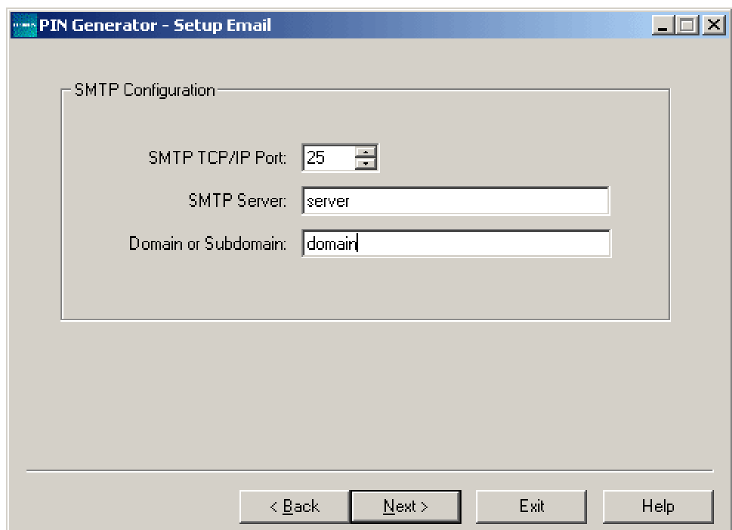
Remove

1. Highlight an existing personnel template.
2. Click the **REMOVE TEMPLATE** button, and answer **YES** to the warning message.
3. Click the **NEXT** button to advance to the SMTP Configuration Screen.

SMTP Configuration

The Setup Email window (*Figure 32*) provides the capability of defining the SMTP server, domain, and TCP/IP port number that the application must talk to in order to send e-mail notification messages. If the Courion Server defaults flag was selected, these fields are pre-populated with the information retrieved from the Courion Server application.

Figure 32: Setup E-mail Window

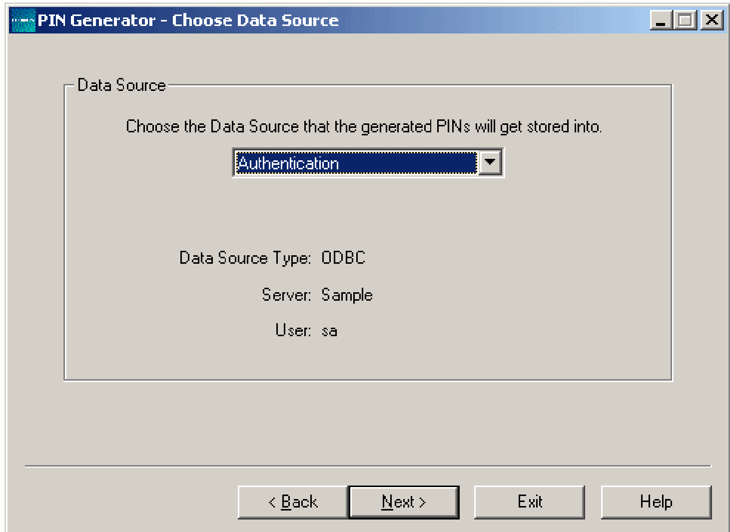


1. In the **SMTP TCP/IP PORT** field, enter the TCP/IP port number that the e-mail server is listing to for all outgoing e-mail messages. The default value is 25.
2. In the **SMTP SERVER** field, enter the SMTP server to use for e-mail notifications.
3. In the **DOMAIN OR SUBDOMAIN** field, enter the SMTP domain or subdominain for e-mail notifications.
4. Click the **NEXT** button to advance to the ODBC Database Screen.

Data Source Setup

The Choose Data Source window (*Figure 33*) provides the capability of defining the ODBC Data Source that the application connects to. This connection is required to migrate and update database fields with new PIN values.

Figure 33: Choose Data Source Window



1. In the **Choose the Data Source that the generated PINs will get stored into** drop down menu, select **Authentication** or **Ticketing** as the data source in which PINs will be stored.

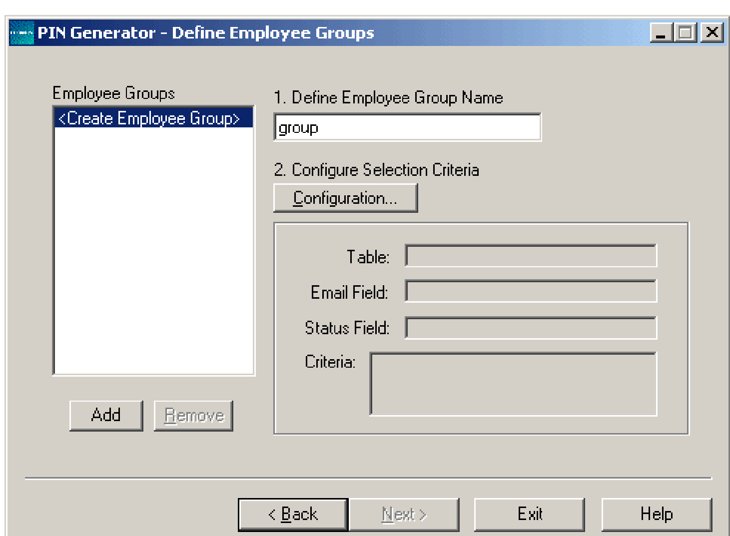
   Note: Data source configuration takes place within ProfileCourier. Refer to *"ProfileCourier Customization Manager" on page 9* for further information.

2. Click the **Next** button to advance to the employee group Setup Screen.

Employee Group Setup

The Define Employee Groups window (*Figure 34*) provides the capability to establish employee groups. Employee groups collect information and settings that are specific to a particular group of records in a database. These settings contain information pertaining to e-mail layout, destination fields for PIN generation/migration, and settings related to the formulation of the generated PIN numbers themselves.

Figure 34: Define Employee Groups Window



Create

1. In the **DEFINE EMPLOYEE GROUP NAME** field, enter in the name of the group to be created.
2. Click the **CONFIGURATION...** button. A dialog box appears, which allows the assignation of a group of records to the employee group.

   The layout and operation of the dialog box is defined in *“E-mail Selection Criteria” on page 53*.
3. Click the **ADD** button to apply the changes to the employee group.
4. Click the **NEXT** button to advance to the Subscribe Data Fields Screen

Modify

1. Select an employee group from the Employee Group list box on the left.
2. Click the **CONFIGURATION...** button. A dialog box appears, which allows the assignation of a group of records to the employee group.

   The layout and operation of the dialog box is defined in *“E-mail Selection Criteria” on page 53*.
3. Click the **UPDATE** button to apply the changes to the employee group.
4. Click the **NEXT** button to advance to the Subscribe Data Fields Screen

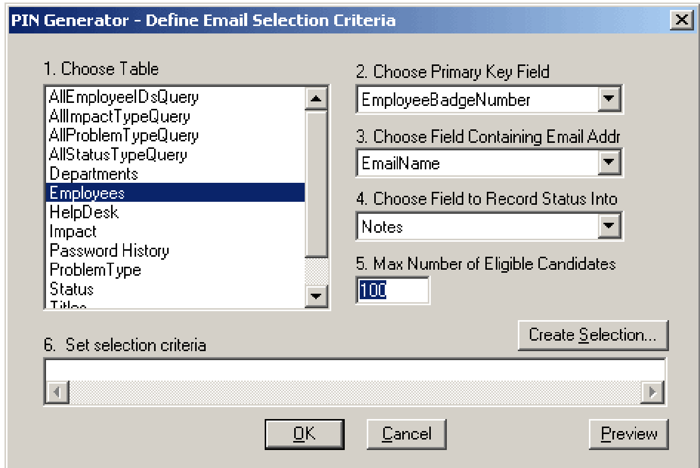
Remove

1. Select the appropriate employee group.
2. Click the **REMOVE** button.
3. Click the **NEXT** button to advance to the Subscribe Data Fields Screen

E-mail Selection Criteria

The Define Email Selection Criteria window (*Figure 35*) provides the means for defining the table and selection criteria for the employee group. It defines the filtered list of records that are to be used when generating PINs, migrating fields, and e-mailing notifications.

Figure 35: Define E-mail Selection Criteria Window



1. In the **Choose Table** field, highlight an entry to assign a table to the employee group.
2. In the **Choose Primary Key** drop-down menu, select the field that best represents the primary key for the table. The values of this field should be declared unique in the table schema.
3. In the **Choose Field Containing E-mail Address** drop-down menu, select the field that stores the e-mail address to which PIN Generator should send e-mail notifications.
4. In the **Choose Field to Record Status Into** drop-down menu, select the field that will store the status of each record during the processing and generation of PINs.

   This status field can be used to filter out records during subsequent runs of the PIN Generator Utility. Only those fields that store text values and are at least 14 characters in length are shown in the pop up list. The following is a list of possible values that may show up in this field:

- **UAW** — Database was updated successfully with migration fields and newly generated PIN values.
- **U-Fail** — Failed to update database with migration fields and newly generated PIN values.
- **E-Ok** — E-mail notification was sent to the receiver successfully.
- **E-Fail** — Failed to send e-mail notification to receiver.

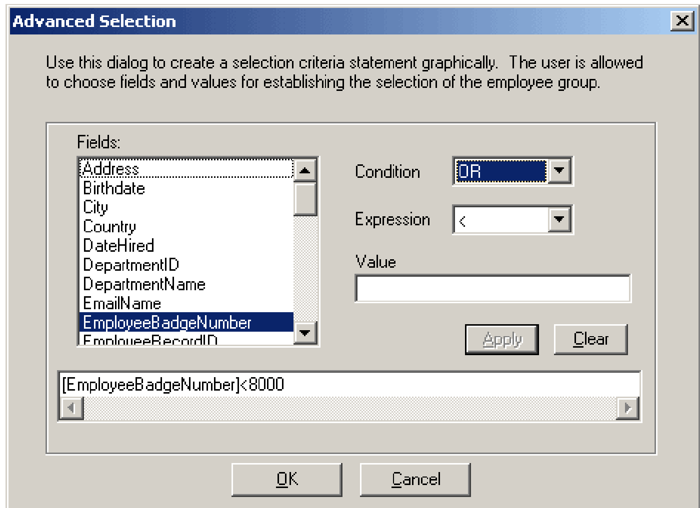
5. In the **Maximum Number of Eligible Candidates** field, enter the maximum number of records to update and send e-mail notifications to.

   This field can be used to configure test runs that capture only a sample collection of records.
6. Click the **Create Selection...** button to enter the *“Advanced Selection” on page 55*, where criteria are entered to filter statements that limit the types of records included into the employee group.
7. Click the **Preview** button to display the *“Preview” on page 55*, which displays the records selected using the existing criteria.
8. Click the **Next** button to advance to the *“Subscribe Data Fields” on page 56*.

Advanced Selection

The Advanced Selection window (*Figure 36*) provides the means for creating the equivalent of a SQL Server^{TM} criteria clause. A well defined selection statement narrows a set of records to a manageable number and limits the target base to which e-mail notifications and database updates may apply.

Figure 36: Advanced Selection Window



1. From the **Fields** list, select a field to which the selection criteria will be applied.
2. From the **Condition** drop-down menu, choose the desired condition.

   If a condition already exists, new conditions are appended to the selection criteria that already exists. There is no order of precedence between the AND and OR conditions.
3. From the **Expression** drop-down menu, choose the appropriate expression to compare a value against the field.
4. In the **Value** field, type the value that is to be compared to the selected field.

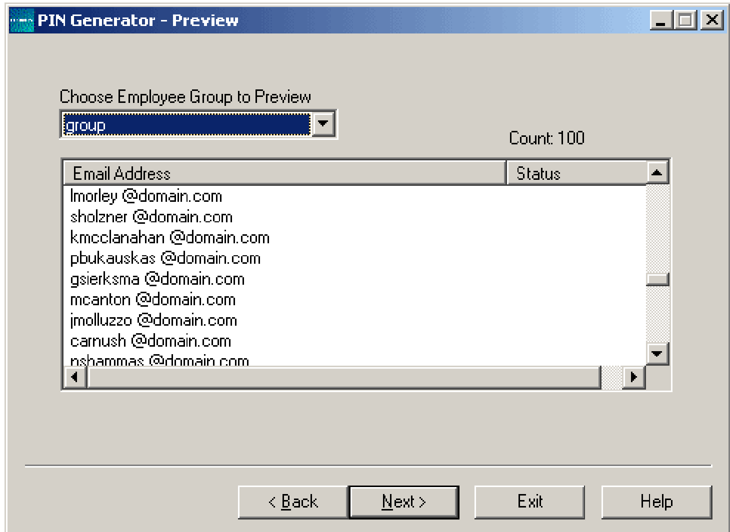
   Text-based fields automatically apply quotes to the value so that the selection criteria can conform to SQL Server^{TM} standards.
5. To append new criteria, click the **Apply** button.
6. To remove the entire selection criteria, click the **Clear** button.
7. To save changes to the employee group, click the **OK** button.
8. To abort any changes, click the **Cancel** button.

Note: If the selection criteria does not include a comparison against a field that changes when a new PIN number is created, such as the field in which the status is recorded, PIN Generator will repeatedly process the same set of records.

Preview

The Preview window (*Figure 37*) displays the records for the employees who meet the selection criteria. It is displayed when the user clicks the **Preview** button on the *"E-mail Selection Criteria" on page 53*.

Figure 37: Preview Window



Subscribe Data Fields

The Subscribe Data Fields window (*Figure 38*) allows the selection of fields that receive PINs. It also provides the mechanism for generating User-Defined macros.

Select Fields that receive PINs

The **SELECT FIELDS THAT RECEIVE PINS** list box provides the capability of assigning newly generated PIN numbers to select fields in the record set represented by an employee group. Each field that is selected creates a macro that takes on the format of "%PIN_<fieldname>%" where <fieldname> is the name of the field selected. These macros can be utilized in the message body of the e-mail notifications that are sent to end users whose records have been changed.

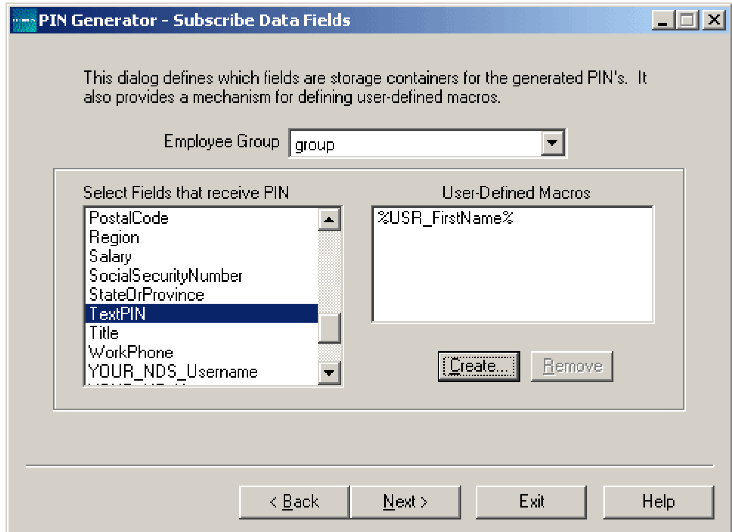
All of these fields are system macros. Selected macros are populated with the generated PIN.

User-Defined Macros

The **USER-DEFINED MACROS** list box allows field data to be placed in the message body of the e-mail notifications. An example would be to provide a user-defined macro for the 'FirstName' field and 'LastName' field of a table to personalize the e-mail notification message. These user-defined macros take on the syntax of "%USR_<fieldname>%" where <fieldname> is the actual field name chosen by the user. Each employee group defines its own PIN generated fields and user-defined macros.

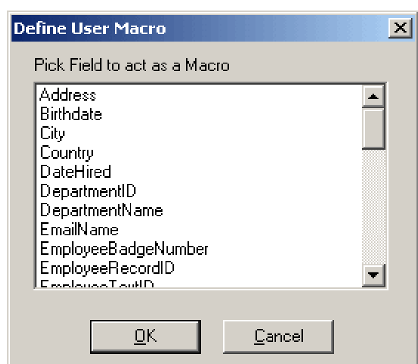
Note: User-defined macros may have the same syntax as PIN macros. User-defined macros contain PIN information from the database. PIN macros return newly generated PIN information. For more information on PIN and user-defined macros please see the *Core Security Knowledge Base*.

Figure 38: Subscribe Data Fields Window



1. In the **Employee Group** drop-down menu, select the desired employee group.
2. In the **Select Fields that receive PIN** list box, select or deselect the fields that are to receive newly generated PINs by clicking the field entries.
3. Click the **Create** button to display a list of all the fields in the table in order to add a user-defined macro to the macro list (*Figure 39*).

Figure 39: Define User Macro Window



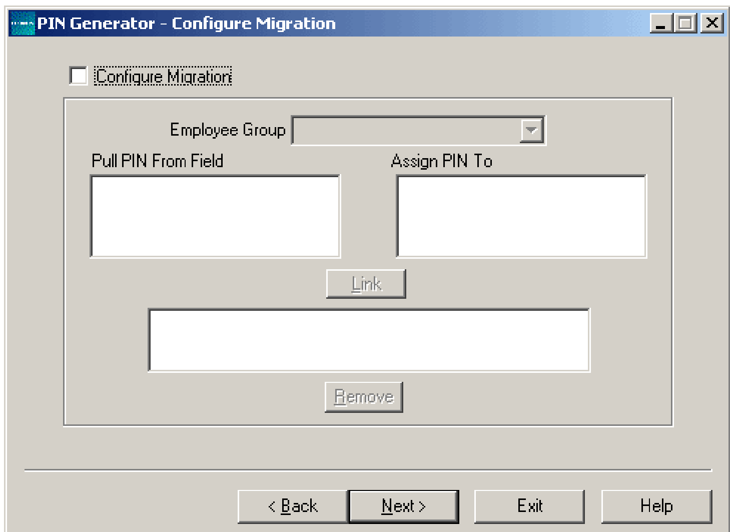
4. Select a field and click the **OK** button to create a User-Defined macro. The macro is added to the **User-Defined Macro** list shown in the Subscribe Data Fields window.
5. To remove a User-Defined macro from the Subscribe Data Fields window, select the macro in the **User-Defined Macro** list and click the **Remove** button.
6. Click the **Next** button to advance to the Configure Migration window.

Configure Migration

The Configure Migration window (*Figure 40*) provides a way to move previously generated PIN information from one field to another as part of a migration effort. When one field is selected from the source list and another field is selected from the destination list, a link can be created that represents the association.

This link also is represented as a macro that the user can use to populate the message body of an e-mail notification. The format of this macro is "%MIG_<field src> -> <field dest>%" where <field src> is the source field to pull the PIN from and the <field dest> is the destination field in which the PIN stored. Each employee group has its own associated migration links.

Figure 40: Configure Migration Screen

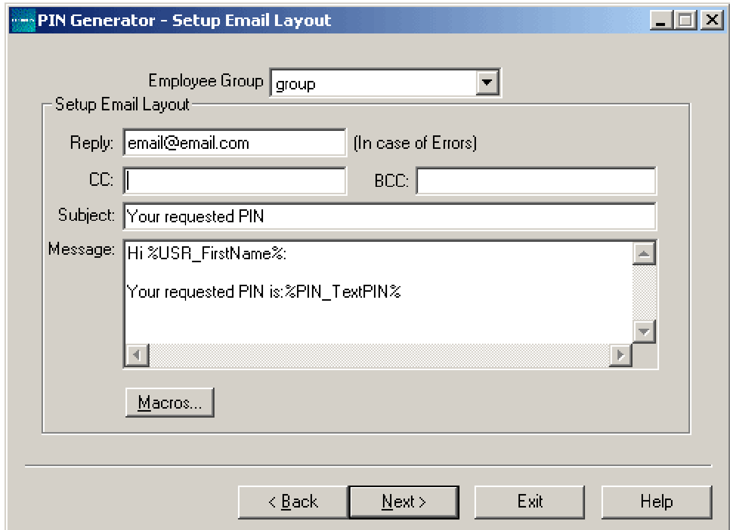


1. Select the **CONFIGURE MIGRATION** check box to enable migration.
2. From the **EMPLOYEE GROUP** drop-down menu, select the desired employee group.
3. In the **PULL PIN FROM FIELD** list box, select the source field that contains the previously defined PIN
4. In the **ASSIGN PIN TO** list box, select the destination field that contains the previously defined PIN.
5. Click the **LINK** button to apply the association of the source and destination fields. This creates an entry in the list box immediately below the **LINK** button. It also creates a macro that defines the migration of the two fields.
6. To remove a migration link, select the link to remove and click the **REMOVE** button.
7. Click the **NEXT** button to advance to the E-mail Layout Screen.

E-mail Layout

The Setup Email Layout window (*Figure 41*) provides the mechanism for defining what the e-mail notification message should look like to the end user. Each employee group defines its own e-mail layout.

Figure 41: Setup E-mail Layout Screen

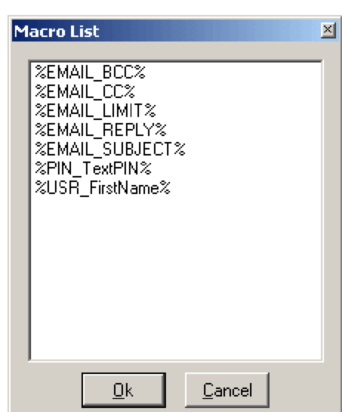


1. In the **Employee Group** drop-down menu, select the desired employee group.
2. In the **Reply:** field, enter the e-mail addresses to reply to when an error occurs during the sending of the notifications. This field also populates the **From** field in the e-mail notification.
3. In the **CC:** field, enter e-mail addresses to receive a carbon copy of the notifications.
4. In the **BCC:** field, enter e-mail addresses to receive a blind carbon copy of the notifications.
5. In the **Subject** field, enter the subject of the e-mail notification.
6. In the **Message** field, enter the message of the notification.

Macros can be used in this section to place PIN numbers and other fields setup using user-defined macros.

7. Click the **Macros...** button to provide a list of available macros that can be placed in the message body (*Figure 42*).

Figure 42: Macro List Screen



The selected macro is appended to the message body text.

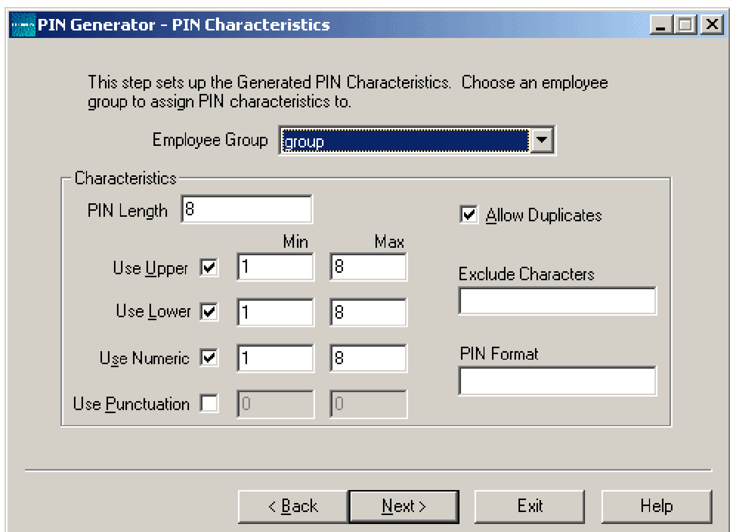
8. Click the **NEXT** button to advance to the PIN Characteristics Screen

PIN Characteristics

The PIN Characteristics window (*Figure 43*) is used to determine the composition and characteristics of the PIN that is to be generated. Such characteristics could be the overall size, how many of each character sets are allowed, the character format of the PIN itself, or which characters to exclude from the generated PIN altogether.

This window can help strengthen the PIN values that are generated by forcing certain conditions that inherently make them harder to crack. Below is an outline of what the different features of this window are and how they impact the generated PIN value.

Figure 43: PIN Characteristics Window



1. In the **PIN LENGTH** field, enter the overall length of the PIN value that is to be generated.
2. In the **USE UPPER** fields, select the checkbox to include uppercase letters in the PIN and enter the minimum number of upper case letters to be used in the **MIN** field and the maximum number of upper case letters to be used in the **MAX** field.
3. In the **USE LOWER** fields, select the checkbox to include lower case letters in the PIN and enter the minimum number of lower case letters to be used in the **MIN** field and the maximum number of lower case letters to be used in the **MAX** field.
4. In the **USE NUMERIC** fields, select the checkbox to include numbers in the PIN and enter the minimum number of numbers to be used in the **MIN** field and the maximum number of numbers to be used in the **MAX** field.
5. In the **USE PUNCTUATION** fields, select the checkbox to include punctuation marks in the PIN and enter the minimum number of punctuation marks to be used in the **MIN** field and the maximum number of punctuation marks to be used in the **MAX** field.
6. Select the **ALLOW DUPLICATES** checkbox to enable PIN Generator to produce PINs with duplicate characters. If the checkbox is not selected, the generated PIN values will not contain any duplicate characters.

7. In the **EXCLUDE CHARACTERS** field, enter all characters that may not be included in the generated PIN. This feature could be used to help avoid situations where similar character symbols can get misinterpreted by the end-user (e.g., "l," "1," "!" and "I").

8. In the **PIN FORMAT** field, enter rules that enforce the sequential layout of the characters contained in the generated PIN. Table one provides the syntax definitions of a PIN format (Table 5).

Table 5: PIN Format Syntax

Symbol	Representation
A	This symbol represents all uppercase and lowercase characters
X	This symbol represents all alphanumeric characters (A–Z), (a–z), (0–9)
U	This symbol represents all uppercase characters only
L	This symbol represents all lowercase characters only
N	This symbol represents all numeric characters only
P	This symbol represents all punctuation characters only
*	This symbol represents any character
...	The ellipse symbol represents the division between the prefix and suffix portions of the format statement
Single/ Double Quotes	Quotes can be used to force literal characters to be qualified as part of the format. (e.g. "a1")

The PIN format can represent both a prefix or suffix or both through the use of the ellipse symbol. This allows for greater flexibility in defining rules associated with restricting character placement. Table 6 provides examples that show how the PIN format could be coded to enforce different criteria.

Table 6: PIN Format Examples

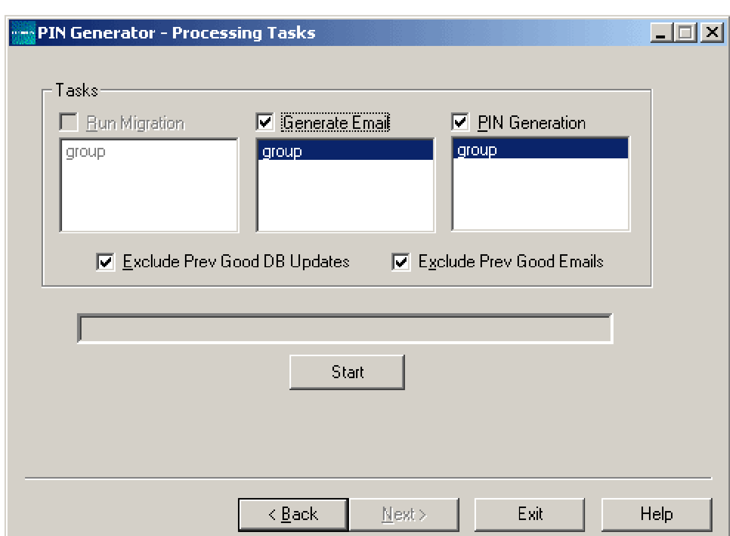
Format	What it Means
U*N	The PIN starts with an uppercase character followed by any character followed by a numeric character
...AP	The PIN ends with an alpha character followed by a punctuation character
U...L	The PIN starts with an uppercase character and ends with a lowercase character
"#B8"...X	The PIN starts with the literal string #B8 and end with an alphanumeric character
U"O'My"...L'ooo"AA'	The PIN starts with an uppercase character followed by the literal string O'My and must end with a lowercase character followed by the literal string ooo"AA
"..."P...P	The PIN starts with the literal string ... followed by a punctuation character and must end with a punctuation character

The last two examples from the table above demonstrate how it is possible to use the PIN format syntax characters as literal characters. The second to the last example shows how single and double quotes can become literal characters. The last example shows how the ellipse character can be reinterpreted as three literal periods. With this feature, the entire printable character set can be supported by the PIN Generator.

Processing Tasks

The Processing Tasks window defines the processing tasks that are to be accomplished by the application.

Figure 44: Processing Window



1. Select the appropriate checkbox, **Run Migration**, **Generate E-mail**, and/or **PIN Generation** in order for each respective task to be performed. Checkboxes are disabled if none of the groups is properly configured for the applicable task.

   The processing order is:

   1. migration (if applicable)
   2. database update
   3. e-mail generation

2. When a checkbox is selected, all of the groups in the text field beneath are selected by default. Deselect the employee groups that are not to be included in the task.

3. Click the **Start** button to begin the process.

   A progress bar shows the percentage of process completion.

4. Once the process has been started, the **Start** button becomes a **Stop** button, which may be clicked to abort the processing.

5. Select the **Exclude Prev Good DB UPdate** checkbox to ignore records that have previously gone through a successful database update through the PIN generator.

   These records contain the **U-OK** status flag in the Status field. See the *"E-mail Selection Criteria" on page 53* for more details.

6. Select the **Exclude Prev Good Emails** checkbox to avoid sending e-mail notifications on behalf of records that have previously sent a successful e-mail notification through PIN Generator.

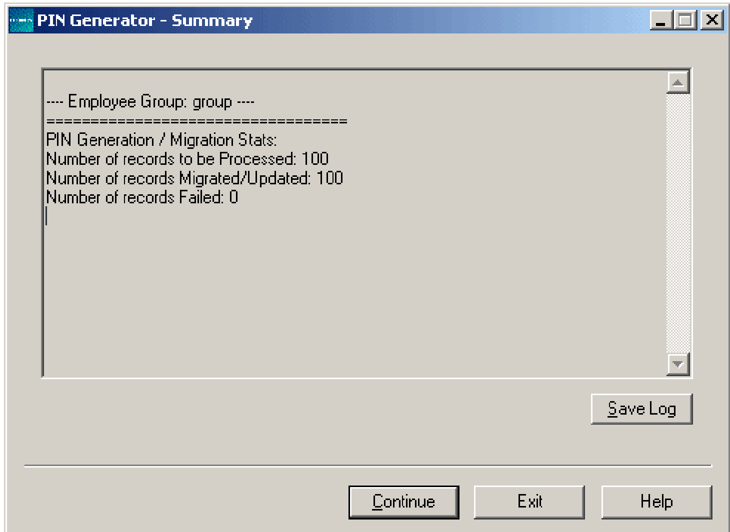
   These records contain the **E-OK** status flag in the Status field. See the *"E-mail Selection Criteria" on page 53* for more details.

Once processing is complete, the Summary window displays the results of the processing.

Summary Window

The Summary Window (*Figure 45*) displays a summary of the processing across all of the employee groups in the current personnel template. The information contained on this page includes the number of records to be processed, the number of successful/failed e-mail notifications, and the number of successful and failed database updates based on PIN generation and migration.

Figure 45: Summary Screen



1. Click the **CONTINUE** button to return to the first page in the wizard ([*“Personnel Template” on page 49*]) to add configurations to the application.
2. Click the **EXIT** button to exit the application.

Log Files

There are three log files associated with PIN Generator:

- smtpemail.log — This log file records SMTP related errors.
- OnePinErr.log — This log file records all PIN Generator-related errors.
- OnePinDbg.log — This log file is only active when the system is in debug mode. This log includes PIN Generator related debugging information.

Notes and Warning

- Pin Generator uses three types of macros. They are differentiated by their prefix:

  PIN_ Required macro that the administrator configures to identify the field in the data source where the PIN is stored.

  USR_ Optional macro(s) that are configured by the administrator for use in the body of PIN Generator produced e-mail notification.

  EMAIL_ Four macros associated with the fields in the e-mail template that are optionally configured by the administrator:

  %EMAIL_BCC%

  %EMAIL_CC%

  %EMAIL_LIMIT%

  %EMAIL_SUBJECT%

  The “PIN” and “USR” prefixes are followed by the field name where the macro information is stored.

  Because the administrator selects the fields associated with these macros, it is possible to select the same field for both (e.g., %PIN_EscrowPassword% and %USR_EscrowPassword). Since both the “PIN” and the “USR” macro may be inserted into e-mail notices, it preferable not to select a field for a “USR” macro that duplicates the field associated with the “PIN” macro or to take caution not to confuse the two when configuring an e-mail notification in PIN Generator.

- If you are running PinGen with Peregrine SCAuto® installed, give the user of PINGEN read and write privileges to the files in the Courion Server folder.

INDEX

Symbols

A

C

D

E

F

H

I

L

M

N

O

P

R

S

T

U

V