

The Dot Net Factory

AD Self-Service Suite for Active Directory

Getting Started Guide for AD Info



Version 3.6

AD Self-Service Suite for Active Directory

Getting Started Guide for AD Info

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AD Self-Service AD Info Getting Started Guide

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Software version – 3.6



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ABOUT THIS GUIDE

This document has been prepared to assist you in becoming familiar with The Dot Net Factory AD Self-Service AD Info. This guide assumes that the steps outlined in the AD Self-Service Suite Quick Start Guide are complete and the AD Self-Service Suite is installed on your system and ready for configuration of the AD Info specific settings.

ABOUT THE AD SELF-SERVICE SUITE FOR ACTIVE DIRECTORY

The AD Self-Service Suite for Active Directory unlocks the productivity and collaborative potential of your network by providing web-based lookup, self-service and delegated administrative capabilities across your entire enterprise. AD Self-Service consists of three applications that can be purchased together or separately: AD WhitePages, which provides an enterprise-wide virtual directory of users, contacts, resources, shares -- any object that exists in your LDAP compliant directory; AD Info, which provides end-user self service of directory information; and AD Password, which provides password self-service and recovery.

The AD Self-Service Suite quickly pays for itself by enabling a broad range of self-service user maintenance activities and allowing the delegation of common administrative tasks, including user and group management. The AD Self-Service Suite leverages your investment in Active Directory while significantly strengthening security, reducing infrastructure costs, streamlining IT operations, and creating better and cost-effective compliance with regulatory requirements.

ABOUT THE DOT NET FACTORY

The Dot Net Factory is a leading provider of Management, Collaboration, and Self-Service solutions for Microsoft Active Directory. The AD Self-Service Suite unlocks the value of your directory investment making it an accessible and easy to use resource for employee communication and collaboration, web-based delegated user and group management, and end-user self-service management of passwords and personal information.

Contacting The Dot Net Factory

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Contacting Customer Support

The Dot Net Factory's world-class support team is dedicated to ensuring successful product installation and use for all The Dot Net Factory solutions.

Support Link

<http://www.adselfservicesuite.com/Support.aspx>

Email at support@TheDotNetFactory.com



AD Self-Service Suite for Active Directory

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AD INFO OVERVIEW

Empower your users with AD Info personal information self-service for Active Directory. AD Info is an easy to use, web-based self-services application that lets users update their own directory information with restrictions by the administrator.

AD INFO USER INTERFACE OPTIONS

AD Info and the rest of the AD Self-Service Suite are unique in offering multiple access points or user interfaces for end users. AD Self-Service Suite brings the services to the users instead of requiring them to learn new habits and navigate to a dedicated web site to use the applications. AD Self-Service Suite seamlessly integrates into the user interface of commonly used applications like Microsoft SharePoint providing access to directory search and self-services at any time from the applications they are accustomed to using.

AD Self-Service Suite AD Info offers the following user interface options:

- Web application – may be accessed as a standard web application with a dedicated URL.
- SharePoint web part – offers a full-featured SharePoint Web Part that may be deployed to any existing Windows SharePoint Services site or SharePoint Portal Server Area.
- Toolbar button deployment – offers a small form factor toolbar button that may be deployed into the user interface of your SharePoint or custom ASP.NET web application. The toolbar deployment will display a button for each application to which the user has been granted access. The toolbar buttons appear as a natural part of the existing application interface. Clicking on a toolbar button will launch a small on-screen version of the applications.

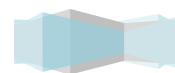
CONFIGURING THE AD INFO SETTINGS

The following sections detail the configuration of the AD Self-Service AD Info specific settings using the Admin web site. The Admin web site is not required on every installation of AD Info when running in Domain Mode. In domain mode, settings are obtained from Active Directory so only a single installation of the Admin web site is required to manage these settings. In local settings mode the AD Self-Service Suite settings are stored on the local file system of the AD Self-Service Suite server. See the AD Self-Service Suite QuickStart and Getting Started Installation Guides for instructions on activating the Admin site on additional servers or websites.

USING THE AD SELF-SERVICE SUITE ADMIN WEB SITE

Note: The AD Self-Service Suite Admin web site may be found at the following URL on any server it has been activated using the Configurator: [http\(s\)://servername/ADSelfServiceSuite/Admin](http(s)://servername/ADSelfServiceSuite/Admin)

1. Navigate to the Admin web site using Internet Explorer 6.0 or greater:
[http\(s\)://servername/adselfservicesuite/admin](http(s)://servername/adselfservicesuite/admin)
2. Click on the AD Info tab entry under the Configuration Tasks pane to navigate to the AD Info Directory View configuration area.



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The screenshot shows the 'Getting Started' page of the AD Self-Service Administration console. On the left is a navigation pane with the following items: Configuration Tasks, Global Settings, Directory Connections, Directory Attributes, AD WhitePages Settings, AD Info Settings, and AD Password Settings. The main content area is titled 'Getting Started with AD Self-Service Administration' and contains the following sections:

- Welcome to the AD Self-Service Admin Web Site!**

This administration site is used for managing all settings for the AD Self-Service Suite. Settings for the AD Self-Service Suite are divided into areas represented as tabs on the left side of this page. There are tabs for configuring settings shared by the entire suite as well as a tab for each suite application. Access controls limiting access to each tab are under the Global settings tab.
- What to do next**

Please follow the following required steps in order to configure AD Self-Service for use in your environment.

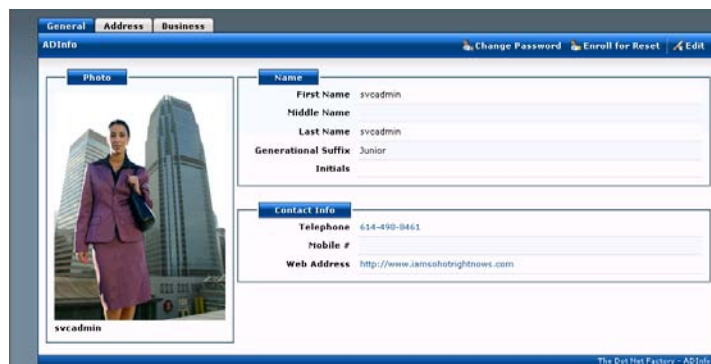
 - Global Settings Tab:** assign users and groups to AD Self-Service administrative roles
 - Directory Connections Tab:** specify proxy user accounts that will be used to access each of the domains or LDAP directories you wish to use.
 - Configure any required settings for the specific suite applications you wish to use.
- About AD Self-Service**

The Dot Net Factory - AD Self-Service Suite

 - Support Email:** Support@TheDotNetFactory.com
 - Support Phone:** +1 (877) 996-4276
 - Support URL:** <http://www.TheDotNetFactory.com/Support.aspx>

AD INFO VIEW MANAGEMENT

AD Info Views represent a self-service profile made available to end-users. AD Info Views are much like the Editor mode of a AD WhitePages Directory View. The difference is that a AD Info View restricts the user to editing only their own personal information. An AD Info View may be created to display any Active Directory attribute, organized by logical tabs.



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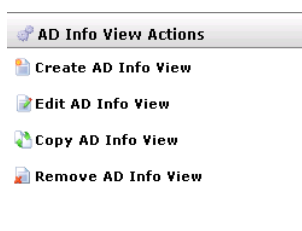
The AD Info Views configuration area allows for the creation, editing, copying and removal of any AD Info View. Users see their AD Info View when properly configured with a valid scope that they have been granted access to under the Access Control section of the AD Info View configuration. Administrators may create many AD Info views, each with alternate settings targeted to different audiences or roles. End users receive only the AD Info View in which they have been granted access.

AD Self-Service Suite AD Info ships with a default AD Info View to help with initial configuration and setup. Administrators need only to edit the AD Info View and provide a valid scope in order for the AD Info View to function. Any number of additional AD Info Views may be created to suit unique business needs.

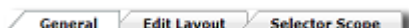
The default AD Info View included with AD Self-Service Suite AD Info gives general access to personal contact information and business organizational structure.

CREATING A NEW AD INFO VIEW

If your environment requires additional customization or functionality, new AD Info Views may be created to meet these needs. Click Create AD Info View.



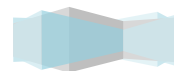
Only the Edit Layout and Selector Scope tabs contain settings that are required in order to create a new AD Info View. The General tab gives all users read access to the Directory View by default.



GENERAL TAB

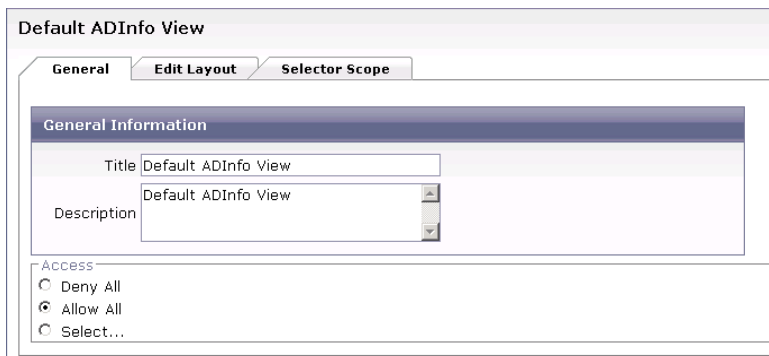
The general tab allows configuration of the AD Info View title as shown in the Admin web site and to end users, and a description (for documentation only) of the AD Info View.

The Access radio button area is used for limiting user access to particular AD Info Views. Access to a AD Info View can be granted or denied globally or on a per user or group basis. By default, all users have write and read access to any Active Directory attribute included in the Edit Layout of the Default AD Info View.



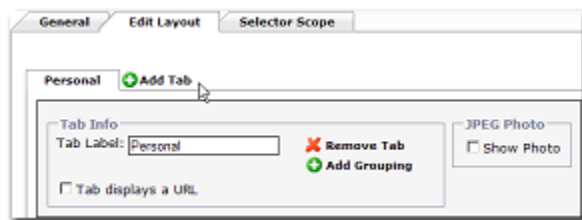
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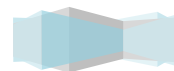


EDIT LAYOUT TAB

The Edit Layout tab is the next required settings section. On this tab you may use our what you see is what you get (WISIWYG) designer to layout the attributes into tabs and groupings that will be displayed in the AD Info View. The configuration options on these screens are used to control how the attributes selected for the AD Info View will be displayed and editable.

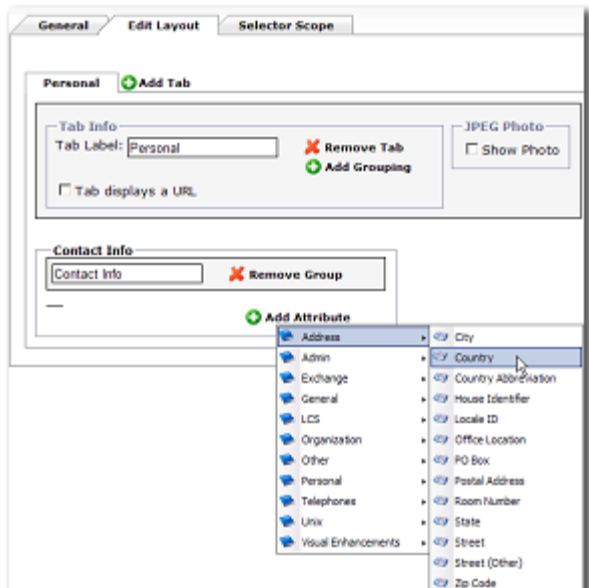


Clicking on the Add Tab will create a new tab that can be named and attributes can be added for display.

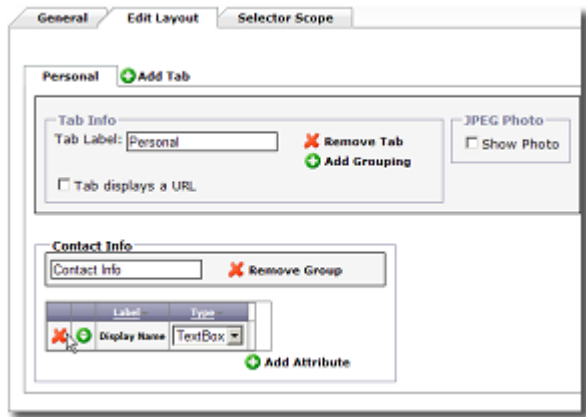


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Clicking on the Add Grouping button will add a grouping of attributes that you may name. Clicking the Add Attribute button will allow specific attributes for this object type to be selected. Attributes will appear within the grouping upon section.

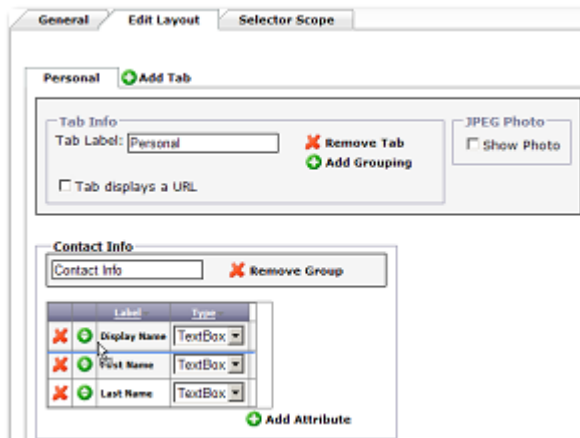


Any of the red X icons on the screen can be used to remove either attributes, groupings, or tabs.

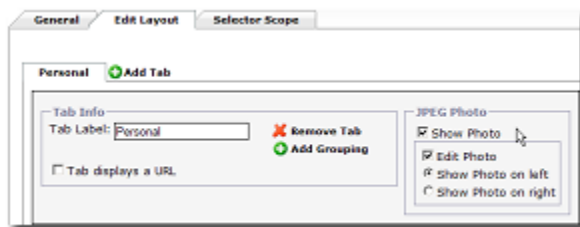


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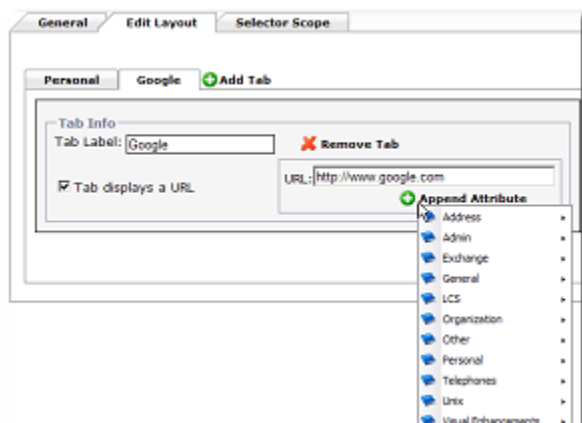
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The green icon with the up and down arrows displayed beside each attribute, can be grabbed and dragged with your mouse. This allows attributes to be reordered within a grouping.



Other options available on the Tab Info section are to show the JPEG photo of a user on this tab or display a URL in this tab instead of displaying directory attributes.

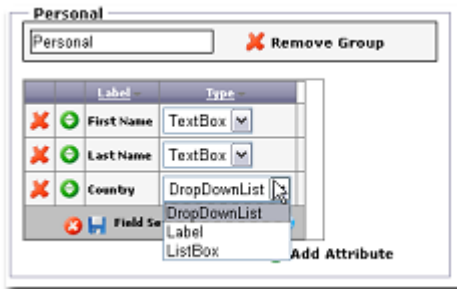


When adding a URL to be displayed in a tab, you may enter attribute names within {} braces and these will be resolved to the actual user or objects values at run time.



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As seen above, when an attribute is added you may select from any of the available Control Types defined for this attribute in the Directory Attributes section of the Admin web site.

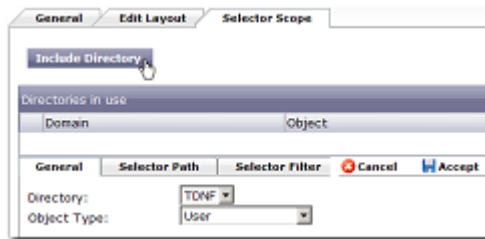


For attributes where list items have been defined, you may select to include all list items to be displayed or only particular list items that are appropriate for the users or other objects being edited in this AD Info View.

Once you have finished designing the AD Info View Layout, you must define a scope in which the user accounts are located.

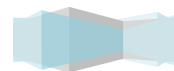
SELECTOR SCOPE TAB

The Selector Scope tab in a AD Info View controls which users will be visible and included in that view. To add a specific Directory, click include Directory and you will see the options presented below.



The options on the General Tab are as follows:

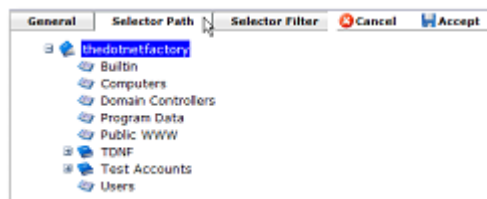
- Directory – allows you to select a specific Active Directory Domain or LDAP partition for inclusion



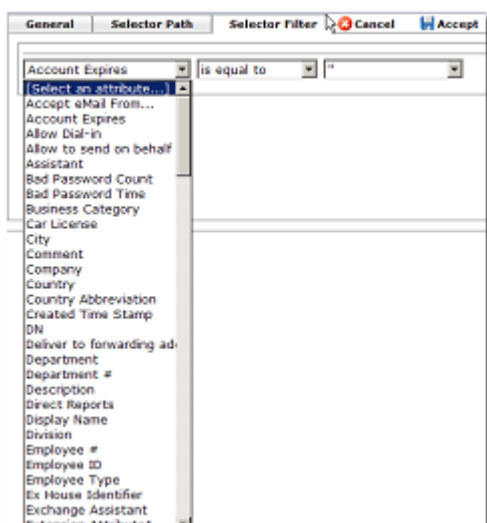
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- Object Type – select the objectClass you wish to include in this view from this domain or directory. For AD Info Views, this drop down dialog should always be left on the “User” entry.



The Selector Path tab is used to limit which objects will be selectable in the Object Selector pop up. The Objects Selector pop up is used when editing distinguishedName attributes like manager and directReports. The selector path limits which objects of the type selected will be searchable and visible in this pop up. Only those objects of this type that exist below the specified OU path in the Directory or domain will be able to access AD Info.



The Selector Filter tab further limits selector results to only those objects of the type selected, below the path selected, or matching a specific search or filter criteria. Any of your directory attributes marked active may be used to filter which objects will be displayed in the Object Selector pop up.

Once you have configured all of the settings required for the AD Info View, click Save AD Info Layout to commit the configuration to the server.

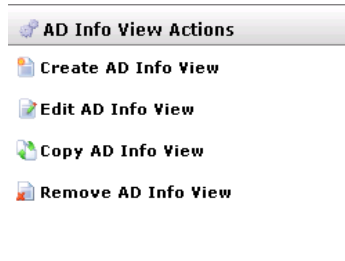


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OPTIONS FOR MANAGING EXISTING AD INFO VIEWS

The AD Info View Actions area displays tasks that may be performed when managing AD Info Views. These actions are visible in the top left of the screen when using the AD Info section of the Admin web site.



Available actions for existing AD Info Views including editing them, copying one to create a new AD Info View, or deleting existing AD Info Views.

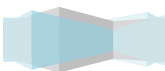
DEPLOYING THE PASSWORD SHAREPOINT WEB PART

Once you have installed and configured AD Self-Service AD Info, you can deploy the AD Info web part on any of your SharePoint sites or pages. The AD Info web part is deployed to the Virtual server gallery if the SharePoint option was selected on the AD Info application tab in the AD Self-Service Configurator.

From the SharePoint page on which you wish to deploy the web part, click on Modify Shared Page, then Add Web Parts, then Browse.



Click on Virtual Server Gallery and then drag and drop the AD Self-Service AD Info web part under the Web Part List onto the SharePoint page. The web part will automatically inherit the theme of the SharePoint site.



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Once you are finished dragging the web part onto the SharePoint page, click the **X** on the Add Web Parts dialog.



To leave Design Mode and return to your SharePoint site, click Modify Shared Page, then Design this Page.



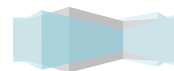
Upon leaving design mode, the AD Info web part you have deployed will appear on the SharePoint page. Users will be able to edit the Active Directory attributes on their own user account that they have been granted access to.

GIVING END USERS ACCESS TO AD INFO

To give end users access to AD Info, use the following URL:

`http(s)://<server where AD Info is installed>/adselfservicesuite/ADInfo`

- AD Info is also available to end users as an embedded button in the AD Password and AD WhitePages user interfaces.
- AD Info is also available as a web part that can be deployed on any WSS site or Portal Area



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- AD Info is also available as a toolbar button that can be deployed in the header of Sharepoint – the Toolbar is available as a web part or as a global deployment option. The global deployment option causes the Toolbar to automatically be loaded on every single page without repeated deployment or management.

