

The Dot Net Factory

AD Self-Service Suite for Active Directory

Getting Started Guide for AD WhitePages



Version 3.6

AD Self-Service Suite for Active Directory

Getting Started Guide for AD WhitePages

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AD Self-Service Password Getting Started Guide

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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 WhitePages. 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 WhitePages 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.

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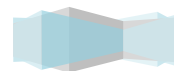
Contacting Customer Support

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



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AD WHITEPAGES OVERVIEW

AD Self-Service Suite AD WhitePages is a completely web-based directory application designed to enable Active Directory as your most easy to use, up to date, and interactive source for employee collaboration.

AD WHITEPAGES USER INTERFACE OPTIONS

AD WhitePages and the rest of the EmpowerID 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-service at anytime from the applications they are accustomed to using.

AD Self-Service Suite AD WhitePages 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 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 applications. 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 application.

SYSTEM REQUIREMENTS

Before installing The Dot Net Factory AD Self-Service Suite, ensure your system meets the following minimum hardware requirements:

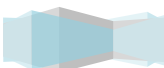
- 800 MHz or greater processor
- At least 256 MB RAM (>512 MB recommended)
- 60 MB hard disk space

Ensure your system meets the following minimum software requirements:

- Microsoft® Windows Server™ 2003
- Microsoft® Internet Information Server 6.0
- Microsoft **.NET Framework 2.0** with ASP.NET

Enabling HTTPS

It is strongly recommended that you use HTTPS with The Dot Net Factory Password. The secure hypertext transfer protocol (HTTPS) is a communications protocol designed to transfer encrypted information between computers over the World Wide



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Web. To enable HTTPS for your Web server you may need to obtain a Server Certificate. For more information, see the following article: <http://technet2.microsoft.com/WindowsServer/en/Library/354f4539-982a-418c-bfe7-4d5155b83f4a1033.mspx?mfr=true>

Optional Server Components:

- To Use the SharePoint Web Parts: Microsoft Windows SharePoint Services 2003 or SharePoint Portal Server 2003

Ensure your client systems meet the following requirements:

- Microsoft® Internet Explorer 6.0 or later – or Firefox 1.5 or later (Note: the Admin web site requires Internet Explorer)

To allow password resets from the Windows logon screen using AD Password, you must install the AD Password Windows client on each client PC. The AD Password Windows client is a GINA Extension that is deployed on each client computer. The Windows client may be deployed silently using Microsoft Active Directory Group policy or a software deployment tool such as Microsoft SMS Server.

To use the AD Password Windows client, computers must meet the following minimum software requirements:

- Microsoft Windows 2000 Server Service Pack 3, or Microsoft Windows Server 2003, or Microsoft Windows XP Professional Service Pack 1 or later
- Microsoft Internet Explorer version 6.0 or later

CONFIGURING THE AD WHITEPAGES SETTINGS

The following sections detail the configuration of the AD Self-Service AD WhitePages-specific settings using the Admin website. The Admin web site is not required on every installation of AD WhitePages 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 server. See the AD Self-Service QuickStart and Getting Started installation Guides for instructions on activating the Admin site on additional servers or web sites.

USING THE AD SELF-SERVICE ADMIN WEB SITE:

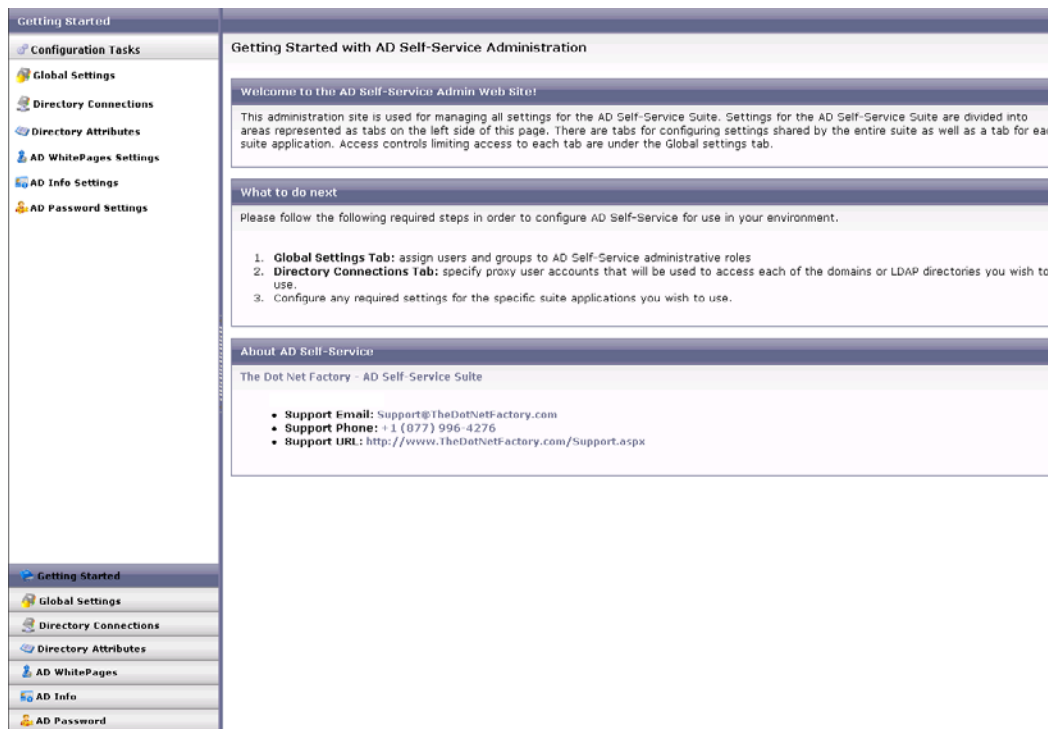
Note: The AD Self-Service Admin web site may be found at the following URL on any server it has been activated using the Configurator: [http\(s\)://servername/ADSelfService/Admin](http(s)://servername/ADSelfService/Admin)

1. Navigate to the Admin web site using Internet Explorer 6.0 or greater:
<http://servername/ADSelfService/Admin>
2. Upon initial installation, the Admin web site is accessible by any user. This should be changed immediately upon installation and is discussed in the QuickStart Guide.
3. Click on the AD WhitePages tab entry under the Configuration Tasks pane to navigate to the AD WhitePages settings area.



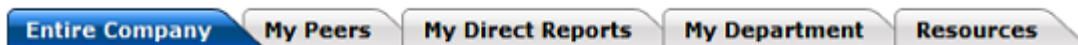
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AD WHITEPAGES DIRECTORY VIEW MANAGEMENT

AD WhitePages Directory Views represent profiles made available to end-users using the multi-profile AD Self-Service Suite technology. A Directory View presents a logical business view of your directory or directories to end-users. A Directory View may be created to display a single department or division or even to show only the direct reports of the current user. Directory views offer both a read-only and “Editor” (read-write) view when an object is selected. The Editor view is only visible to select users of a specific Directory View.



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

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

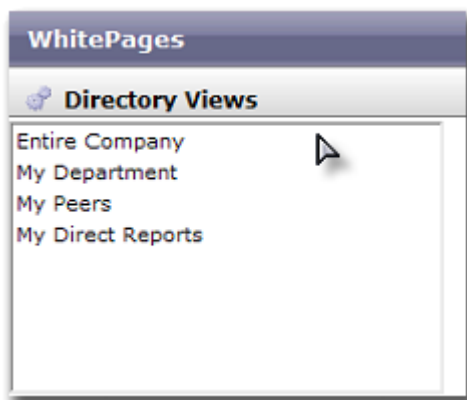


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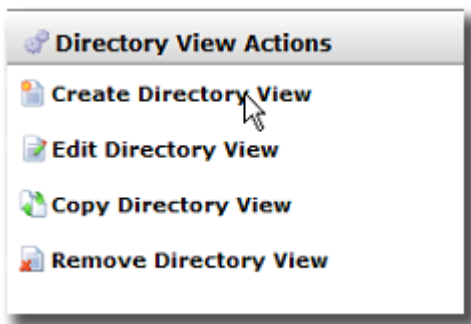
The default Directory Views included with AD WhitePages are:

- Entire Company – Any employee and contact within the directory will be displayed.
- My Peers – Employees that have the same manager as the current user will be displayed.
- My Direct Reports – Employees that the current user manages will be displayed.
- My Department – Employees that are in the same department as the current user will be displayed.



CREATING A NEW DIRECTORY VIEW

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



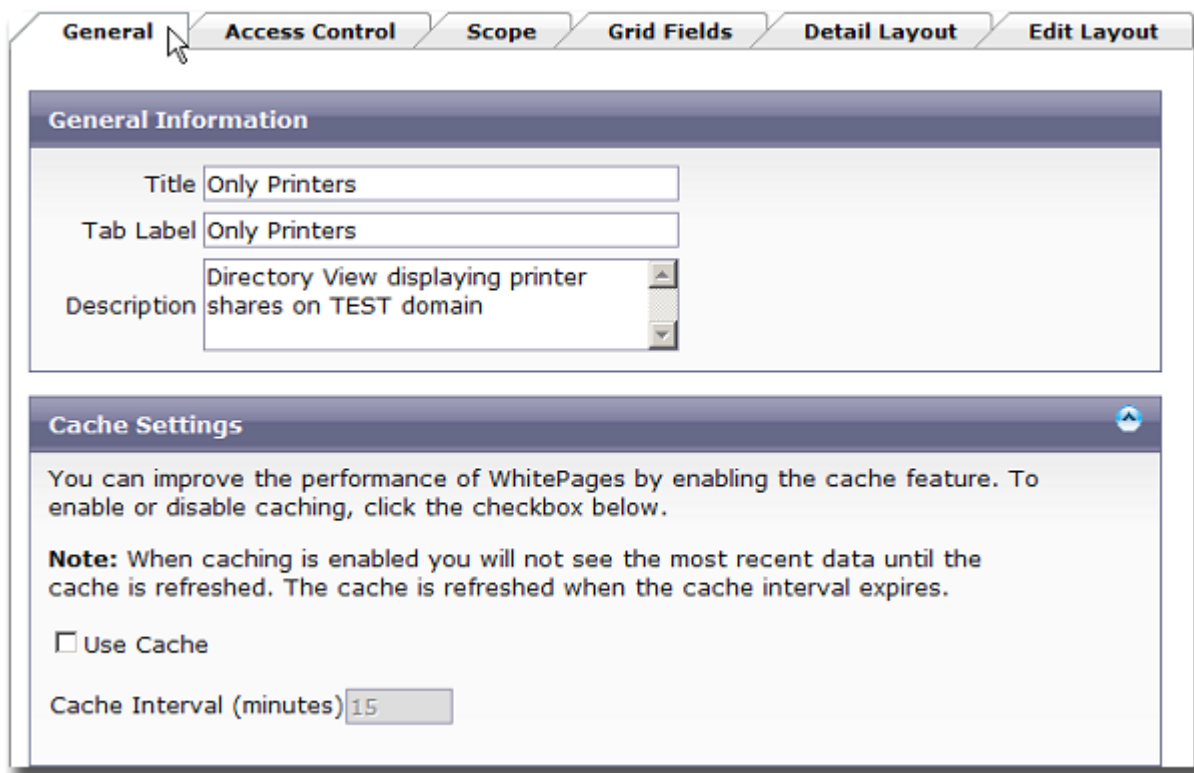
Four of the tabs shown when configuring a new Directory View contain settings that are required in order to create a new Directory View. These are: Scope, Grid Fields, Detail Layout and Edit Layout. The Access Control tab gives all users read access to the Directory View by default.



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The **General** tab allows configuration of the Directory View Title as shown in the Admin website, the Tab Label as displayed to end users, a description (for documentation only), and the cache settings for the Directory View. Caching may be enabled on a per Directory View basis and a cache refresh timeout set. Caching can dramatically improve performance in Directory View containing data from a large number of different directories.



The screenshot shows a configuration window with several tabs: **General**, **Access Control**, **Scope**, **Grid Fields**, **Detail Layout**, and **Edit Layout**. The **General** tab is active and contains two sections:

- General Information:** Includes text boxes for **Title** (set to "Only Printers"), **Tab Label** (set to "Only Printers"), and a **Description** text area (set to "Directory View displaying printer shares on TEST domain").
- Cache Settings:** Includes a note about performance, a checkbox for **Use Cache** (which is unchecked), and a **Cache Interval (minutes)** spinner box set to 15.

ACCESS CONTROL TAB

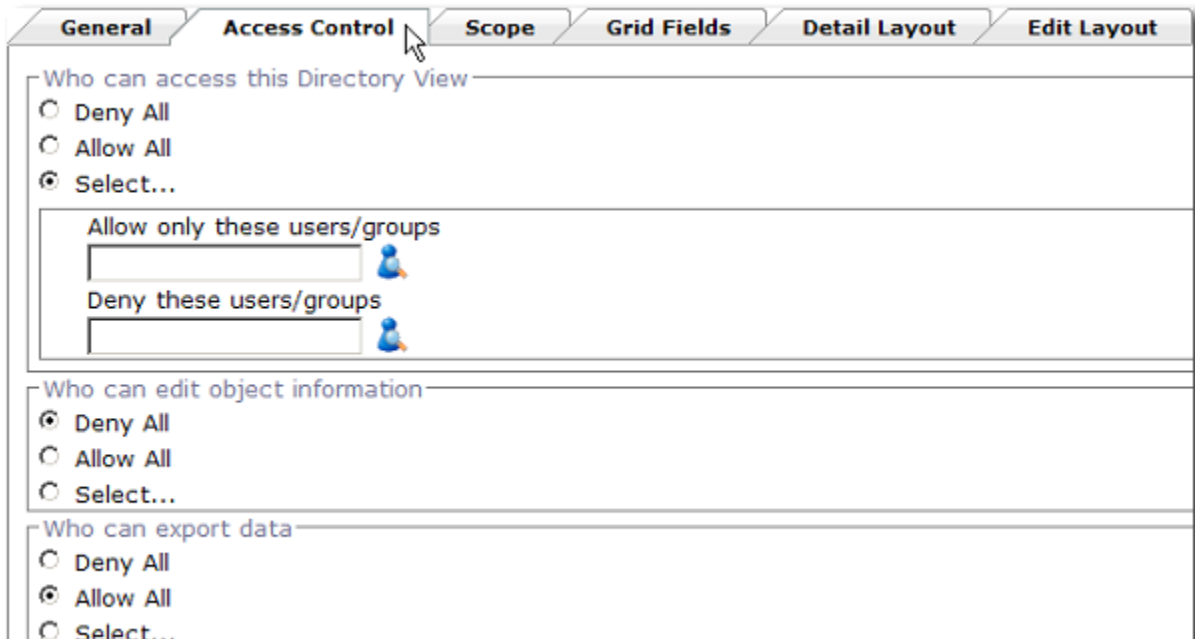
The Access Control tab is used for limiting user access to particular Directory Views as well as limiting their rights to features within a view. Access to a Directory View and to each feature can be granted or denied globally or on a per user or group basis.

By default, all users have read-only access to each of the AD WhitePages Directory Views. In order to edit information within AD WhitePages, Allow All or specific user or groups must be selected in the Access Control tab under the Who can edit object information section.



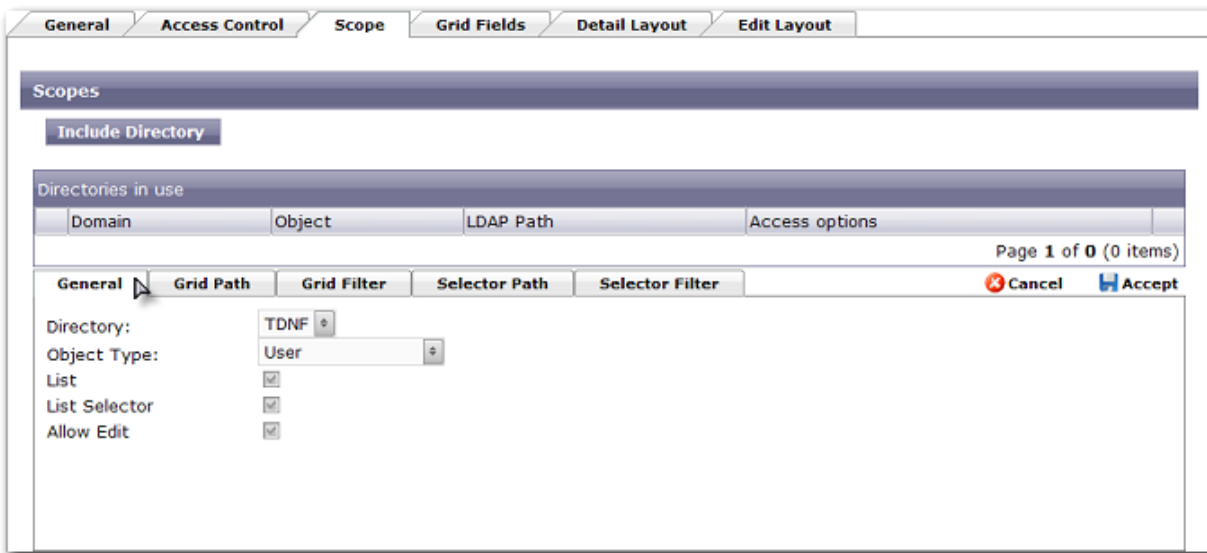
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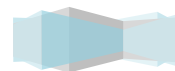


SCOPE TAB

The Scope tab in a Directory View controls which information will be visible and included in that view. Directories may be added for inclusion on a per objectClass basis. Some Directory Views may include users and contacts while other might only include printers, computers, and network shares. To add an objectClass from a specific Directory, click include Directory and you will see the options presented below.



The options on the General tab are as follows:



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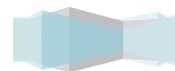
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- Directory – allows you to select a specific Active Directory Domain or LDAP partition for inclusion
- Object Type – select the objectClass you wish to include in this view from this domain or directory
- Use in Grid (true or false) – this selection determines whether objects of this type will be displayed in the AD WhitePages grid as browsable objects
- Use in Selector (true or false) – this selection is used to allow object types that are not displayed in the grid of this Directory View to still be visible when viewing the details of a user or another object. E.g. A user may own groups and this would be displayed when viewing the details of a user. However, if Use In Grid is not selected for this object type, they will not be displayed in the grid results.
- Edit (true or false) – this selection enables the editor access control to apply for this scope for the object type specified. In order to edit information in AD WhitePages, this option must be enabled for the scope and a user or group has to be specified as an editor on the Access Control tab.

The Grid Path tab is used to limit grid results for a particular objectClass to only those of this type that exist below a specific Organizational Unit path in the Directory or domain added.

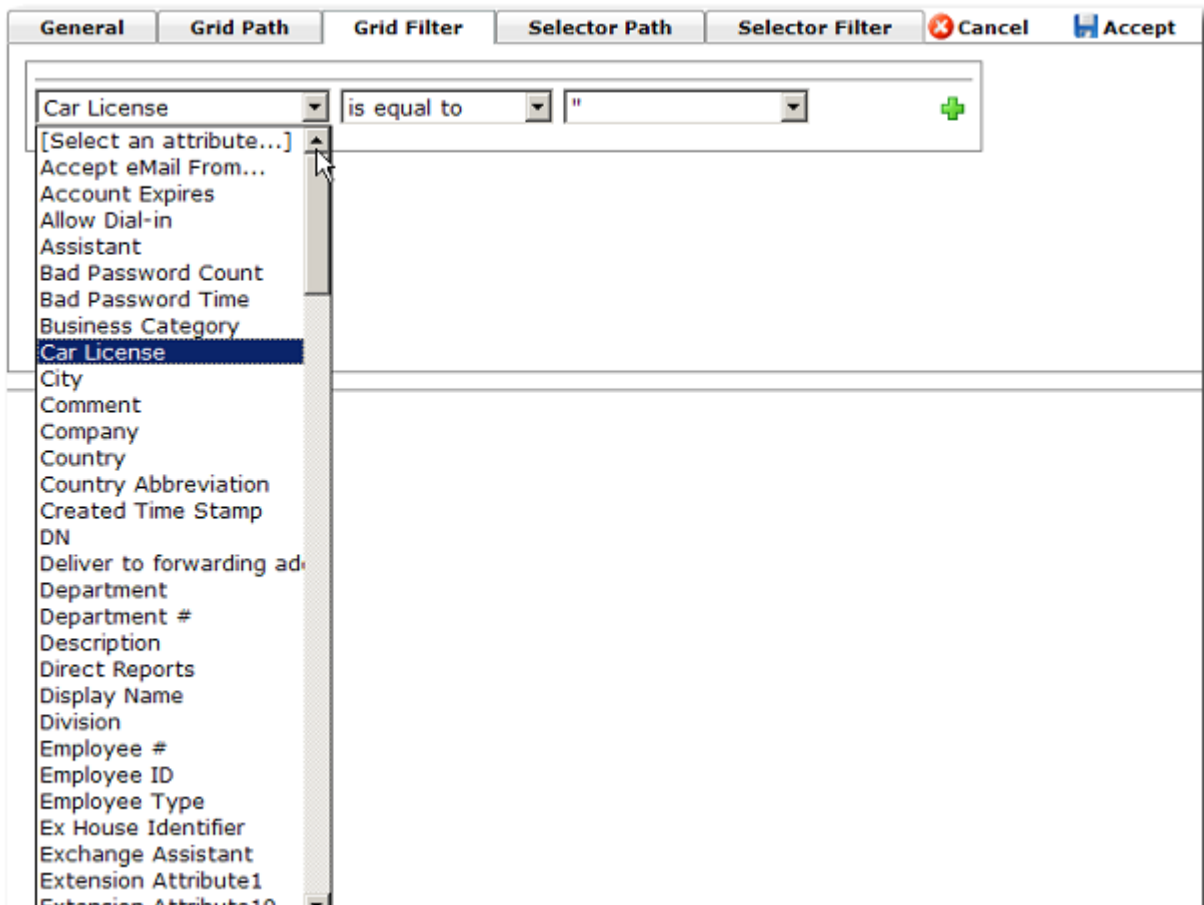


The Grid Filter tab further limits grid results to only those objects of the type selected, below the path selected, matching a specific search or filter criteria. Filters can be used to only show users in specific departments or that are members of particular groups, etc. Any of your directory attributes marked active may be used to filter which objects will be displayed in a particular Directory View. The Filter interface allows complex search criteria to be defined with operands.

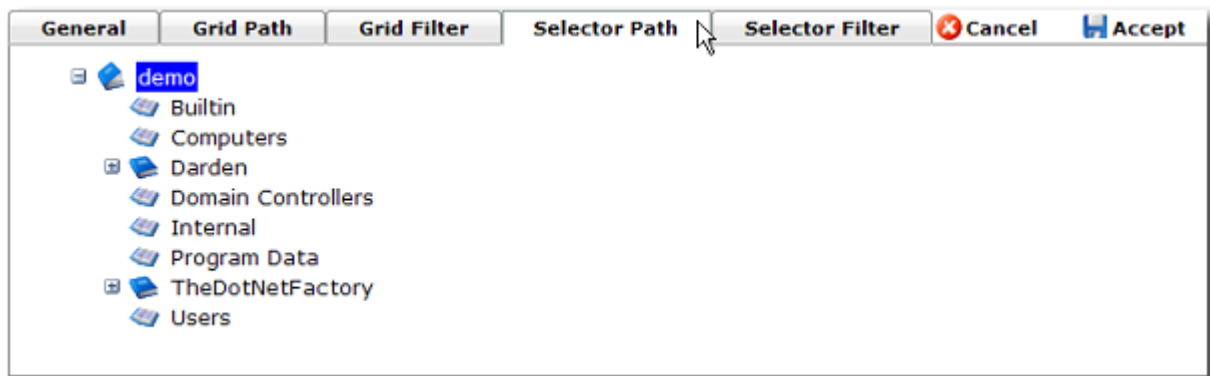


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The Selector Path tab is used to limit which objects will be selectable in the Object Selector pop up. The Object Selector popup is used when editing distinguishedName attributes like manager and directReports. The selector path limits which objects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



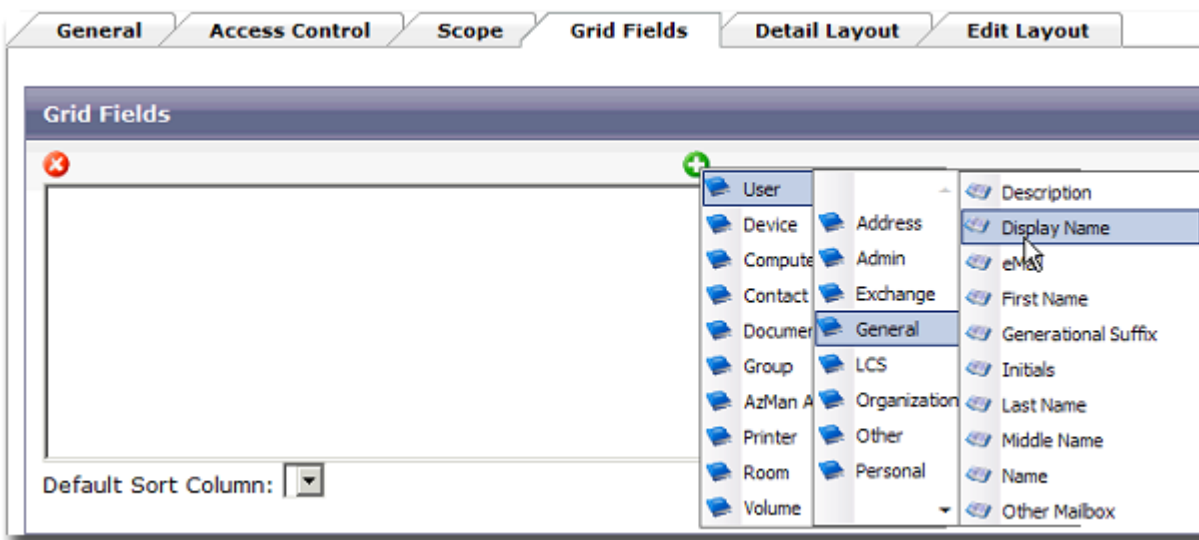
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The Selector Filter tab further limits selector results to only those objects of the type selected, below the path selected, or matching a specific search or filter criteria. Any of your directory attributes marked active may be used to filter which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

GRID FIELDS TAB

The Grid Fields tab is the next required settings section to configure for a Directory View. The attributes added here are the attributes that will be displayed in the AD WhitePages grid. Any attribute for the object types added under the scope option are available to be added to the grid. Attributes may be added using the green +image and removed using the red Ximage. Attributes may be reordered from the left to right on the grid by reordering them up and down in the listbox displayed on the screen. An attribute may be selected as the default Sort Column used when results are rendered in the AD WhitePages user interface.



DETAIL LAYOUT TAB

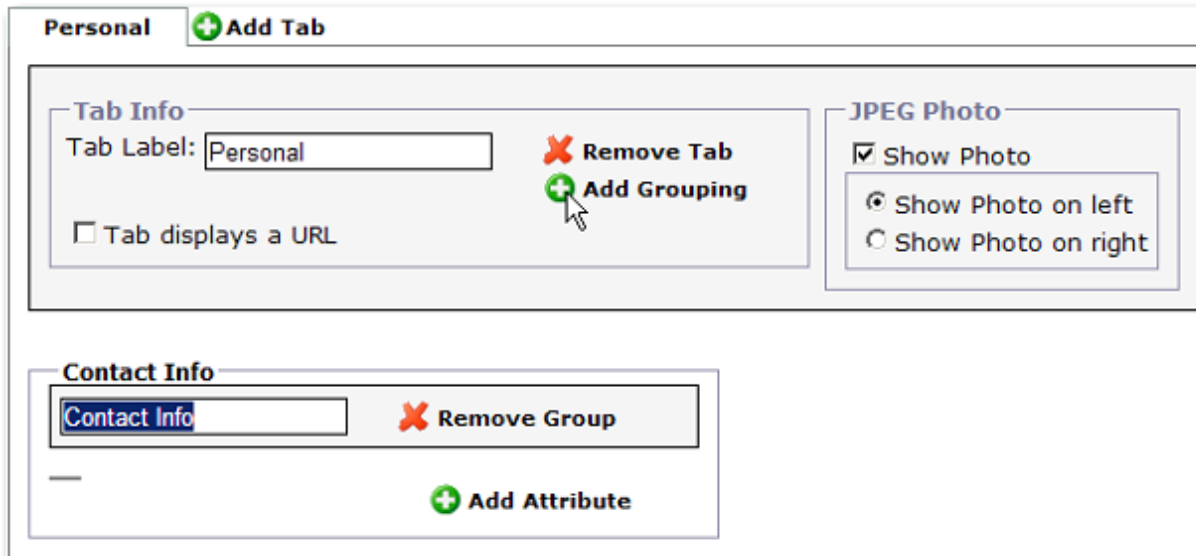
The Detail Layout tab is the next required settings section. On this tab you may use our 'what you see is what you get' (WYSIWYG) designer to layout the attributes into tabs and groupings that will be displayed when an object is selected in the AD WhitePages grid.



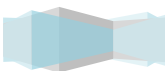
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A dropdown list displays each of the objectClasses that have been added on the Scope tab for this Directory View. Each objectClass has its own unique details layout displaying different attributes and information when that object type is selected. For example, users can display user attributes and information whereas selecting a printer object will display printer-specific attributes in its own layout.

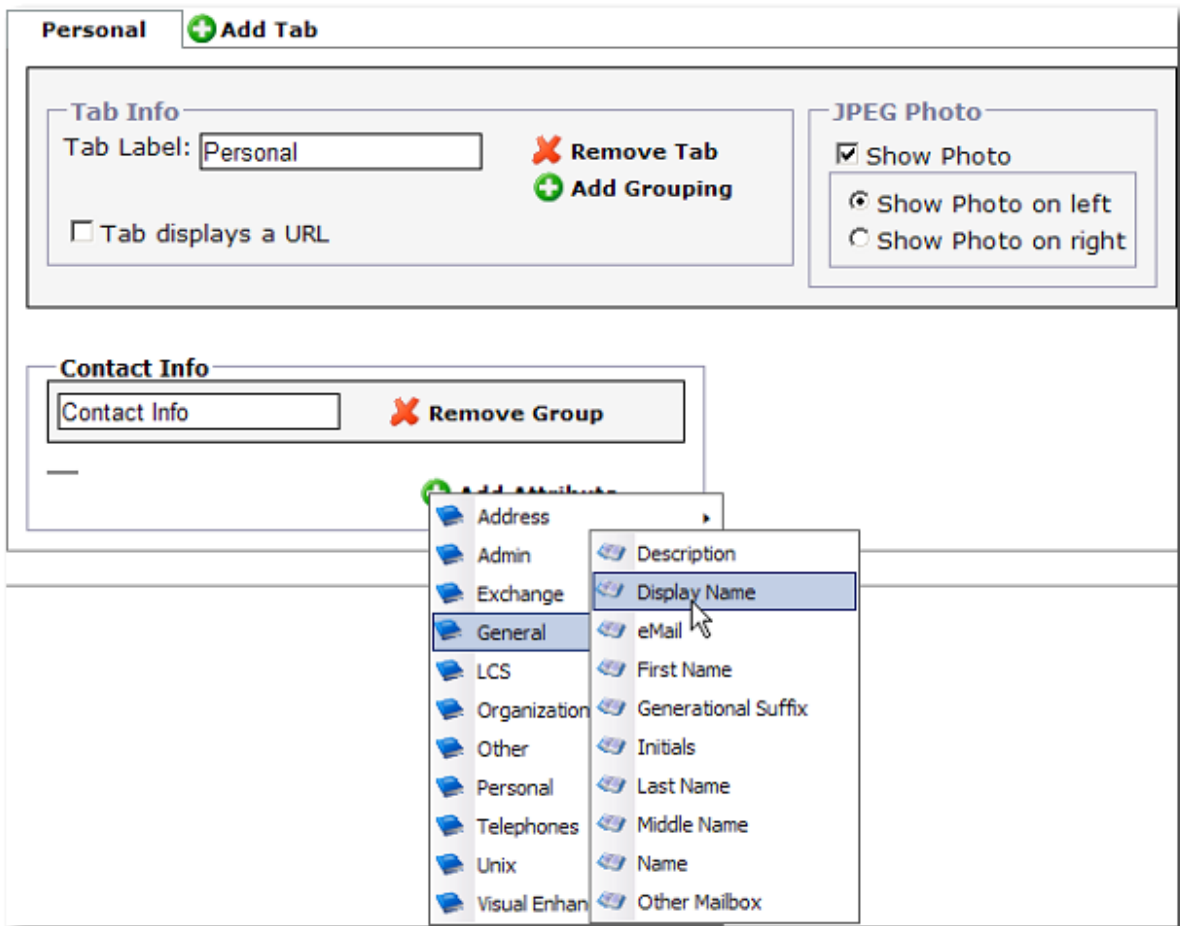


Clicking on Add Tab will create a new tab that can be named and attributes can be added to display.

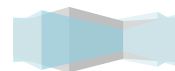


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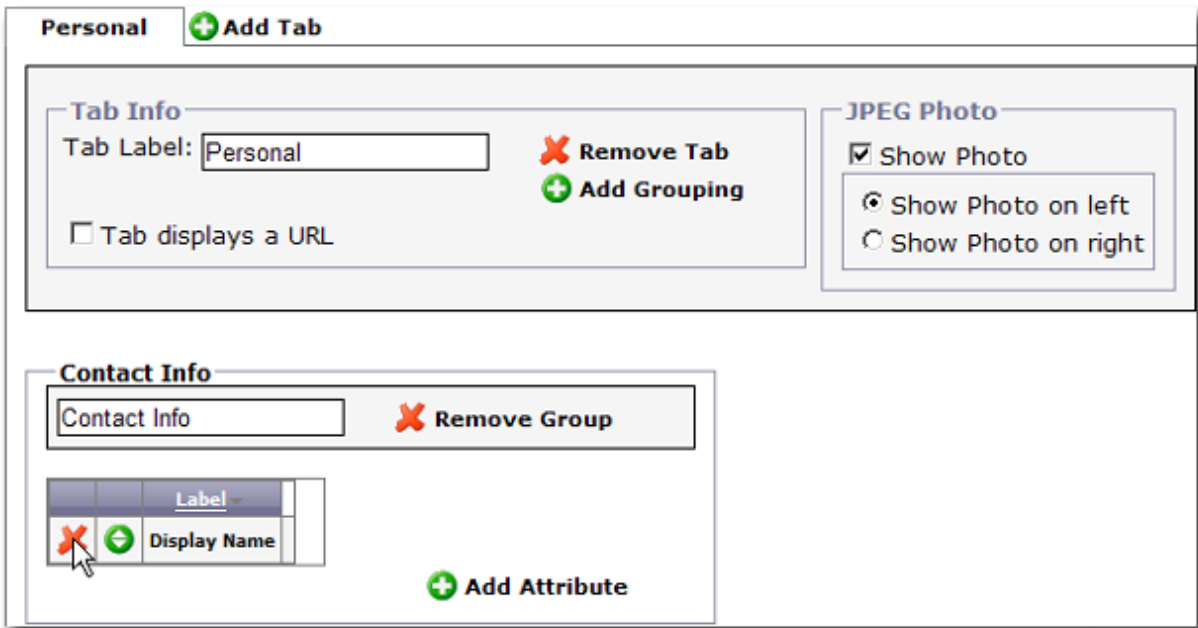


Clicking on the Add Grouping button will add a grouping of attributes that you may name. Clicking the Add Attribute button will allow specific attributes for this object type to be selected. Attributes will appear within the grouping upon selection.

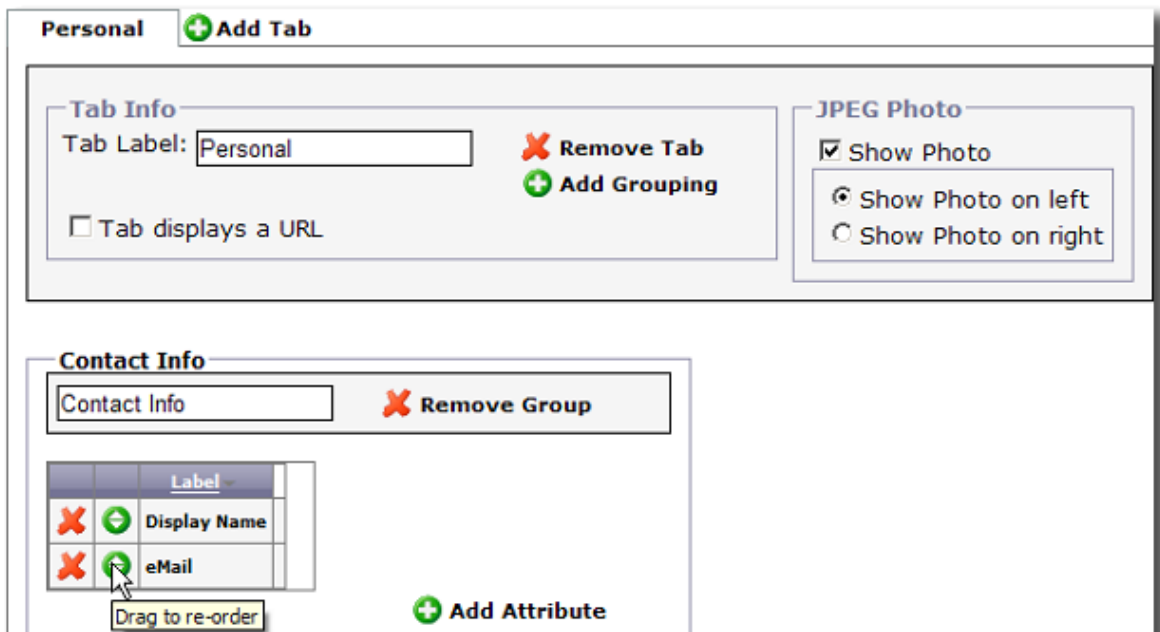


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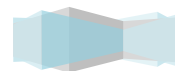
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Any of the red X icons on the screen can be used to remove either attributes, groupings, or tabs.



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.

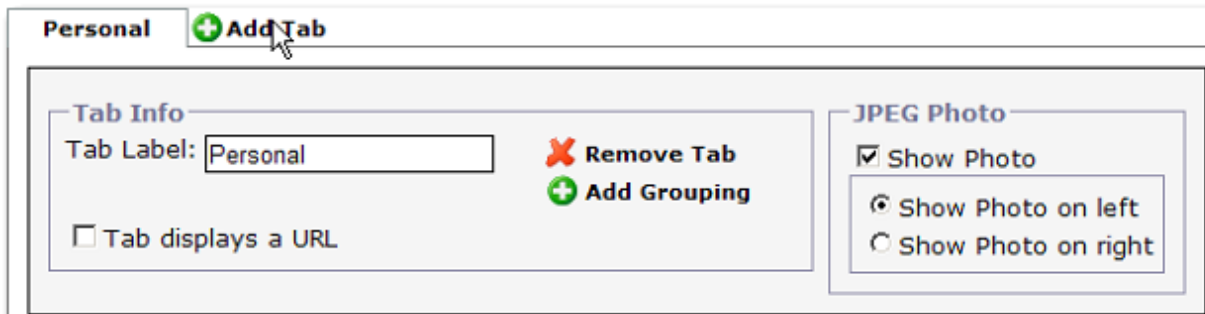


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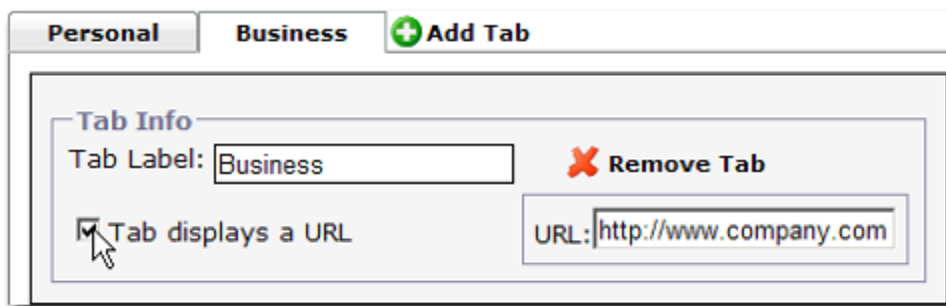
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Above is an example of a details section created using the visual layout designer.



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.



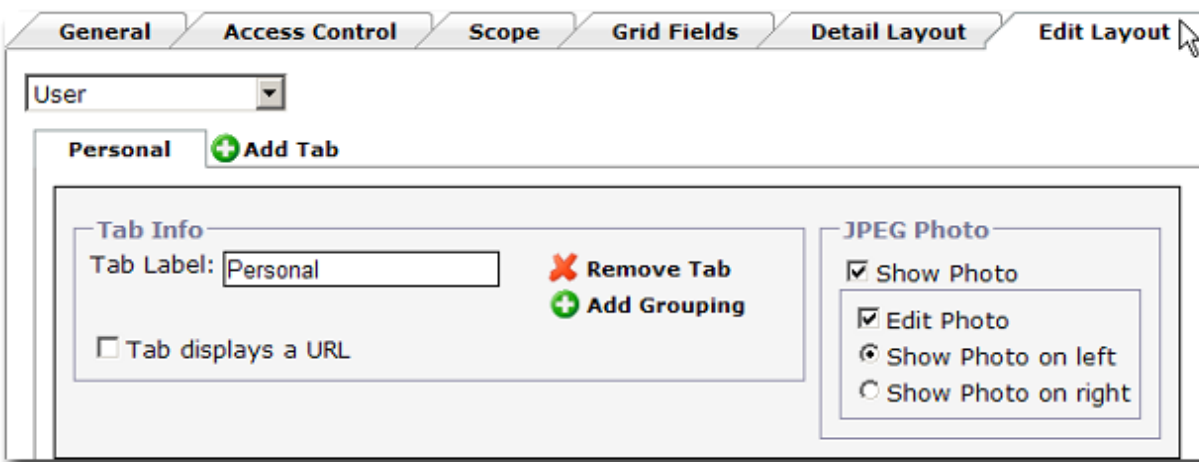
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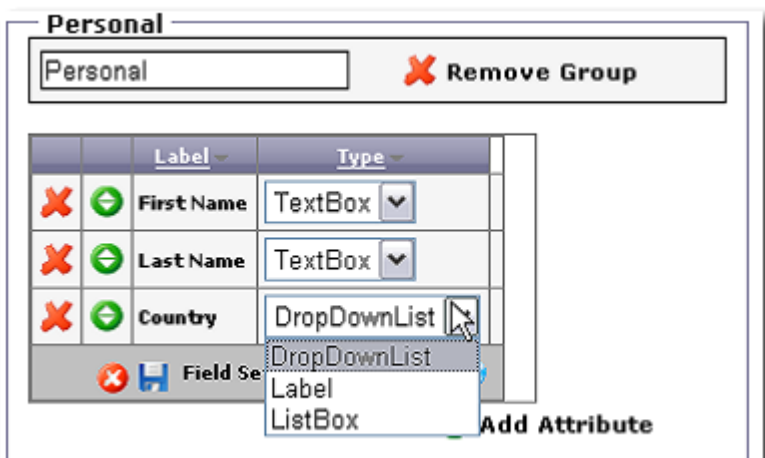
When adding a URL to be displayed in a tab, you may enter attribute names within {} braces and these will be resolved to the actual user or object values at run time.

EDIT LAYOUT TAB

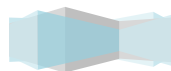
The Edit layout tab is identical in function to the Detail Layout with the addition of a few more configuration options. The Edit Layout tab is used to design the view users assigned as Editors will see when editing the specific object type you are currently configuring the edit layout for. For example, Editors editing user objects may have a completely different layout than when they are editing groups.



The additional configuration options on this screen are used to control how the attributes selected for the edit view will be displayed and editable.

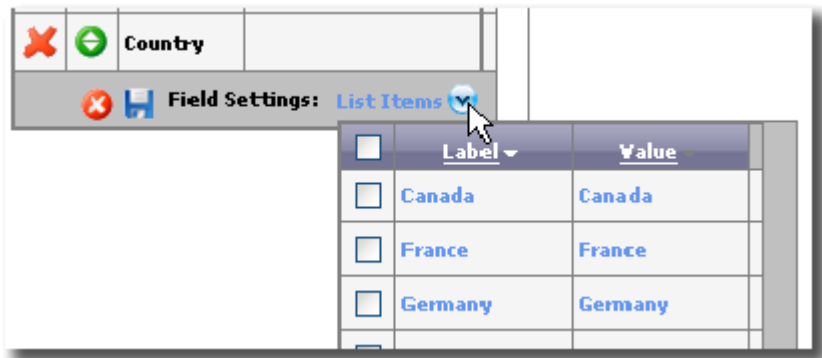


As seen above, when an attribute is added you may select from any of the available Control Types defined for this attribute in the Directory Attributes section of the Admin web site.



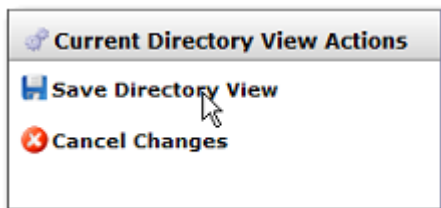
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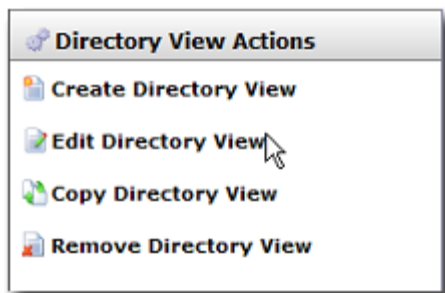
For attributes where list items have been defined, you may select to include all list items to be displayed or only particular list items that are appropriate for the users or other objects being edited in this Directory View.

Once you have configured a read-only and edit view for each objectClass used in this Directory View, click Save Directory View to commit the configuration to the server.



OPTIONS FOR MANAGING EXISTING DIRECTORY VIEWS

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



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

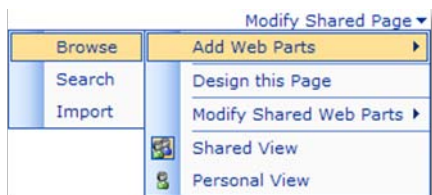
DEPLOYING THE AD WHITEPAGES SHAREPOINT WEB PART

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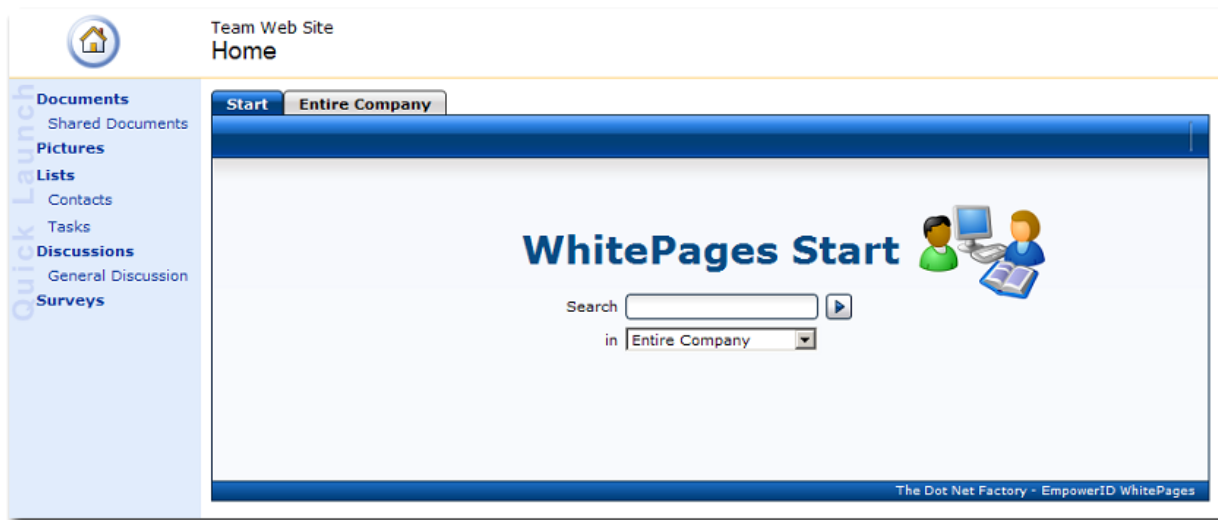
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Once you have installed and configured AD Self-Service AD WhitePages, you can deploy the AD WhitePages web part on any of your SharePoint sites or pages. The AD WhitePages web part is deployed to the Virtual server gallery if the SharePoint option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



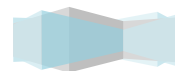
Click on Virtual Server Gallery and then drag and drop the AD Self-Service AD WhitePages web part under the Web Part List onto the SharePoint page. The web part will automatically inherit the theme of the SharePoint site.



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.



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Upon leaving design mode, the AD WhitePages web part you have deployed will appear on the SharePoint page. Users will receive notifications if their password is about to expire and if they need to enroll, if configured in the AD WhitePages admin page.

GIVING END USERS ACCESS TO AD WHITEPAGES

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

[http\(s\)://<server where AD WhitePages is installed>/ADSelfServiceSuite/ADWhitePages](http(s)://<server where AD WhitePages is installed>/ADSelfServiceSuite/ADWhitePages)

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

