

The Dot Net Factory

AD Self-Service Suite for Active Directory

Quick Start Guide



Version 3.6

AD Self-Service Suite for Active Directory

Quick Start Guide

© The Dot Net Factory, LLC. 2005-2011. All rights reserved.

This guide contains proprietary information, which is protected by copyright. The software described in this guide is furnished under a software license or nondisclosure agreement. This software may be used or copied only in accordance with the terms of the applicable agreement. No part of this guide may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of The Dot Net Factory, LLC.

Warranty

The information contained in this document is subject to change without notice. The Dot Net Factory makes no warranty of any kind with respect to this information. THE DOT NET FACTORY SPECIFICALLY DISCLAIMS THE IMPLIED WARRANTY OF THE MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. The Dot Net Factory shall not be liable for any direct, indirect, incidental, consequential, or other damage alleged in connection with the furnishing or use of this information.

Trademarks

The Dot Net Factory® AD Self-Service is a trademark of The Dot Net Factory, LLC. Other trademarks and registered trademarks used in this guide are property of their respective owners.

Headquarters

4393 Tuller Road

Dublin, Ohio 43017

www.ADSelfServiceSuite.com

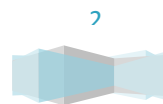
e-mail: info@TheDotNetFactory.com

U.S. and Canada: 877-996-4276

The Dot Net Factory AD Self-Service Suite Quick Start Guide

Updated – May 31, 2011

Software version – 3.6

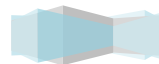


AD Self-Service Suite for Active Directory

Quick Start Guide

Table of Contents

ABOUT	4
SYSTEM AND INSTALLATION REQUIREMENTS	4
REQUIRED USER ACCOUNTS FOR THE AD SELF-SERVICE SUITE	5
INSTALLING THE AD SELF-SERVICE SUITE.....	5
THE AD SELF-SERVICE CONFIGURATOR:	6
SETTINGS TAB – CONFIGURING STORAGE AND PROXY ACCOUNTS.....	6
LICENSE TAB – LICENSING USERS AND DOMAINS	7
APPLICATION TABS – ACTIVATING USER INTERFACES	7
USING THE AD SELF-SERVICE ADMIN WEB SITE:	8
CONFIGURING THE AD SELF-SERVICE SUITE REQUIRED SETTINGS:	9
CONFIGURING DIRECTORY CONNECTIONS FOR USE IN AD SELF-SERVICE	9
ACTIVATING AD SELF-SERVICE SUITE LICENSES.....	10
CONFIGURING THE AD WHITEPAGES MINIMAL SETTINGS:	11
CONFIGURING THE AD INFO MINIMAL SETTINGS:.....	12
CONFIGURING THE AD PASSWORD MINIMAL SETTINGS:	12
DEPLOYING THE AD SELF-SERVICE SHAREPOINT WEB PARTS	12
AD SELF-SERVICE URLS FOR END USERS	13
CONCLUSION.....	13



AD Self-Service Suite for Active Directory

Quick Start Guide

ABOUT

This document has been prepared to assist you in configuring the minimum settings for a basic trial installation of the AD Self-Service Suite. More detailed instructions may be found in our other product guides and videos.

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

Phone: 877-996-4276 (United States and Canada)

Email: info@TheDotNetFactory.com

Address

4393 Tuller Road

Dublin, Ohio 43017, USA

Web site: www.ADSelfServiceSuite.com

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

www.ADSelfServiceSuite.com/support.aspx

Email at support@TheDotNetFactory.com

SYSTEM AND INSTALLATION REQUIREMENTS

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

- 1.4 GHz or greater processor
- At least 1 GB RAM
- 200 MB hard disk space

Ensure your system meets the following minimum software requirements:

- Microsoft® Windows Server™ 2003 or greater
- Active Directory 2003 or greater
- Microsoft® Internet Information Server 6.0 or greater
- Microsoft .NET Framework 2.0 with ASP.NET
- Member of Domain



AD Self-Service Suite for Active Directory

Quick Start Guide

Optional Server Components:

- To Use the SharePoint Web Parts: Microsoft Windows SharePoint 2010, SharePoint 2007, SharePoint Services 2003, or SharePoint Portal Server 2003

Ensure your client systems meet the following requirements:

Microsoft Internet Explorer 7.0 or later – or Firefox 1.5 or later

(Note: the Admin web site requires Internet Explorer)

REQUIRED USER ACCOUNTS FOR THE AD SELF-SERVICE SUITE

Installation User:

The user logged on to the AD Self-Service server during installation must be a domain user that is a member of the local Administrators group. Please do not use a domain account that also exists as a local account on the machine with the same name (e.g. administrator). The installation user will require rights to deploy a web part if the SharePoint option is selected.

Directory Connection (Proxy) Users:

The proxy user accounts are used by the applications in the AD Self-Service Suite to retrieve information from your Active Directory domains or LDAP partitions and perform all account management and modification actions. These accounts must reside in their respective domain or directory and will require the necessary privileges needed to perform any action used in the AD Self-Service applications implemented. A member of the Domain Administrators group may be used for simplicity.

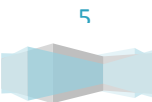
Local Administration User:

The Local Account is used to write to the event log and perform other local operations. This account must be specified on each server running the AD Self-Service Suite. This user account must be a member of the local administrators group. The local administration user may be either a local or domain user account.

INSTALLING THE AD SELF-SERVICE SUITE

To install The Dot Net Factory AD Self-Service Suite:

1. Logon to the installation server as a domain user that is a member of the local administrators group. We do not recommend using the “administrator” account as this may cause issues.
2. Ensure that your AD Self-Service Suite server meets all installation requirements.
3. Locate your AD Self-Service Suite installation file.
4. Click to run the setup program.
5. Select “Next” on all setup screens and click “Finish”.



AD Self-Service Suite for Active Directory

Quick Start Guide

Following installation, you will find a new “The Dot Net Factory” program group in your server’s Start Menu. Please run the AD Self-Service Configurator shortcut in order to complete the configuration of your server.

THE AD SELF-SERVICE CONFIGURATOR:

The AD Self-Service Configurator is a .NET 2.0 Windows application designed to activate or remove the various member applications of the AD Self-Service Suite from a server. The Configurator allows activation or deactivation of the web applications, web parts, toolbars, and Recovery Center. The Configurator also allows for configuration of the Local Administration account used for event logging.

SETTINGS TAB – CONFIGURING STORAGE AND PROXY ACCOUNTS

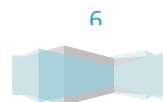


The settings tab is used to set up the Local Account. The Local Account is used by AD Self-Service for any local system access including writing to the event log. The Local Account may also be referred to as the Local Proxy Account.

LOCAL ACCOUNT CONFIGURATION

The local proxy account that you enter below must be a member of the local Administrators group on the AD Self-Service server. The account you configure here can be a domain account, as long as it is a member of a group granting it local administrative rights.

Please type the NetBIOS Domain name into the first box, then the username and password into the boxes below it.

A dialog box titled "AD Self-Service Settings" with the subtitle "Provide local credentials for event log and file system access". It contains a section for "Local Administrative Account" with three input fields: "Domain/Machine Name" containing "ITDNF", "User Name" containing "svcadmin", and "Password" containing "*****". A "Test" button is to the right of the password field. At the bottom of the dialog are "Save" and "Close" buttons.

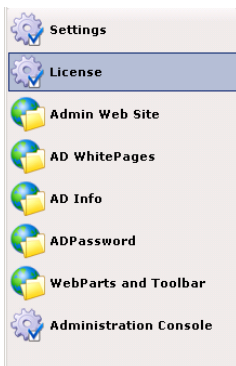
AD Self-Service Suite for Active Directory

Quick Start Guide

The “Test” button can be clicked to verify that the specified account has the required privileges. If the test is successful, you will see a success message. If the test fails, please re-enter the username and password or try another account.

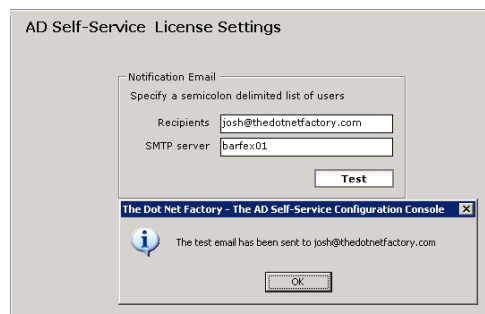
Once you have entered an account with the necessary privileges, click the “Save” button at the bottom of the window to commit the configuration.

LICENSE TAB – LICENSING USERS AND DOMAINS



The License tab of the Configurator is used to configure license notification emails. If this is filled out the recipient will receive an email when the License File is due to expire.

To configure the license notification emails, place the email address in the recipient’s box. If there is more than one entry, separate with a semicolon. Then enter the SMTP Server name. Use the “Test” button to send a test email to that email address.



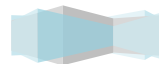
License files will be sent to you by The Dot Net Factory support team when you request a trial or purchase an application in the AD Self-Service Suite.

The basic process for licensing your trial is to copy the License.xml that is sent to you by The Dot Net Factory to the directory of <Server AD Self-Service Suite is installed on> C:\Program Files\The Dot Net Factory\AD SelfService Suite\Settings.

APPLICATION TABS – ACTIVATING USER INTERFACES

The Configurator provides a tab for each application in the suite to activate the user interface you wish to use in your environment. The SharePoint user interface may only be activated on servers hosting this application. AD Password includes an additional web site called the Recovery Center. This is the anonymous site users are redirected to in the event of a logon failure. The Recovery Center may be installed on all IIS sites using Windows authentication.

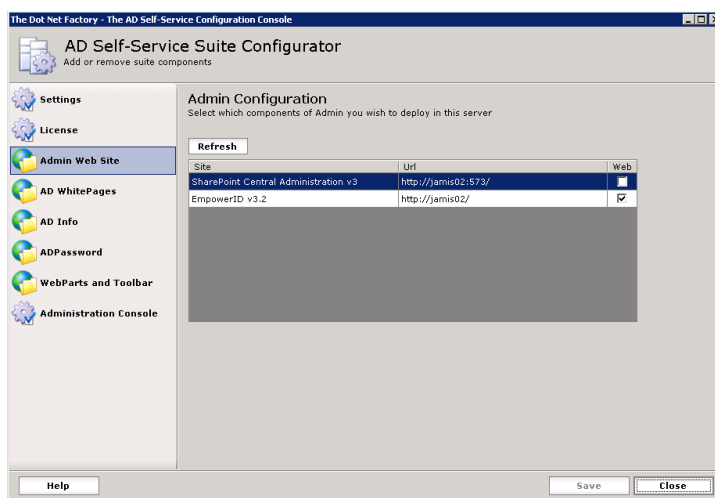
The AD Self-Service Admin web site is used to manage all of the settings for each application in the AD Self-Service Suite.



AD Self-Service Suite for Active Directory

Quick Start Guide

The method for activating the user interfaces for any of the AD Self-Service Suite applications is the same. When you select the tab for the application, the Configurator will load a grid displaying all of the IIS web sites on the server. Each user interface you wish to activate may be clicked for activation on the IIS web sites. Options that may not be selected will be grayed out and are not selectable. After you make all your selections by checking the desired user interfaces on the desired IIS sites, click the “Save” button at the bottom of the screen to commit the changes.



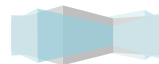
Please install each of the applications and interface you wish to use. Make sure to install the Admin web site so that you may configure the required application settings.

Note: The URLs for the web applications are:

- [http\(s\)://servername/ADSelfService/Admin](http(s)://servername/ADSelfService/Admin)
- [http\(s\)://servername/ADSelfService/ADWhitepages](http(s)://servername/ADSelfService/ADWhitepages)
- [http\(s\)://servername/ADSelfService/ADInfo](http(s)://servername/ADSelfService/ADInfo)
- [http\(s\)://servername/ADSelfService/ADPassword](http(s)://servername/ADSelfService/ADPassword)
- [http\(s\)://servername/ADSelfService/RecoveryCenter](http(s)://servername/ADSelfService/RecoveryCenter)

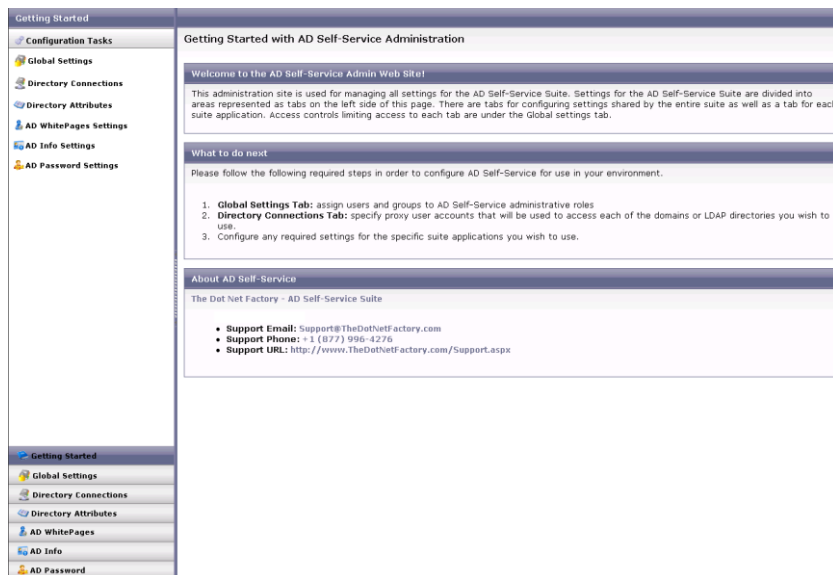
USING THE AD SELF-SERVICE ADMIN WEB SITE:

The AD Self-Service Admin web site is used to manage all of the settings for each application in the AD Self-Service Suite.



AD Self-Service Suite for Active Directory

Quick Start Guide



The Admin web site is divided into navigation sections on the left of the screen. These sections are used to navigate between the various application settings. The Global Settings, Directory Connections, and Directory Attributes tabs manage settings shared by the entire suite. The remaining tabs manage the application-specific settings.

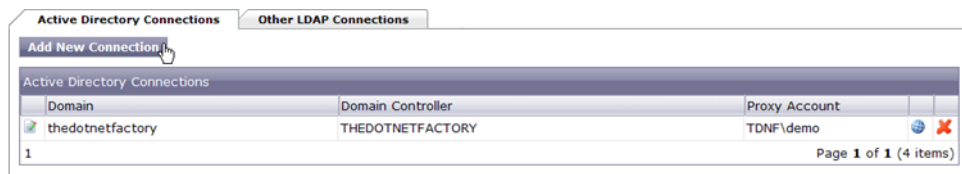
CONFIGURING THE AD SELF-SERVICE SUITE REQUIRED SETTINGS:

This QuickStart will configure only the minimal settings required to get your trial up and running. Please refer to our other product guides and videos for more in-depth configuration information.

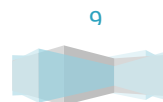
CONFIGURING DIRECTORY CONNECTIONS FOR USE IN AD SELF-SERVICE

In order to activate the AD Self-Service applications for domains in your environment, you must add the domain(s) and proxy account(s) in the Directory Connections section of the Configuration Tasks pane.

Click on the Directory Connections tab and then select the Add New Connection button to add your domain.

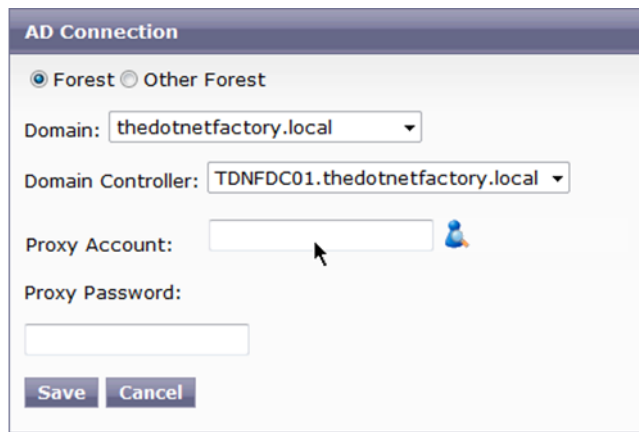


Select the domain you wish to add from the Domain drop down dialog box, and then select the Domain Controller you wish the AD Self-Service Suite to contact when performing actions. To set up the proxy account for this domain, click on the blue pawn icon.



AD Self-Service Suite for Active Directory

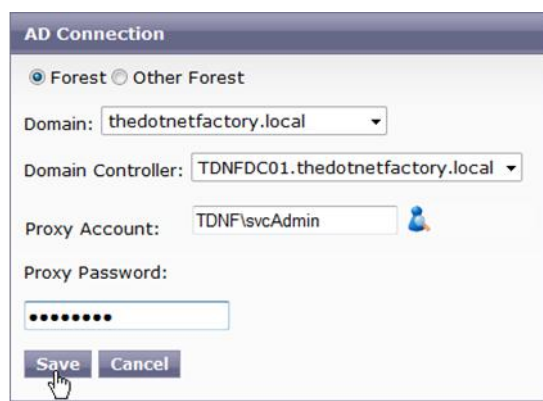
Quick Start Guide



The search for users and groups dialog will appear in a pop-up window. This window will allow you to search your domain(s) for a proxy account.

(Note: The proxy user accounts are used by the applications in the AD Self-Service Suite to retrieve information from your Active Directory domains and perform all account management and modification actions. A member of the Domain Administrators group may be used for simplicity.)

Type in the Proxy Account password and click “Save” to save this information.



ACTIVATING AD SELF-SERVICE SUITE LICENSES

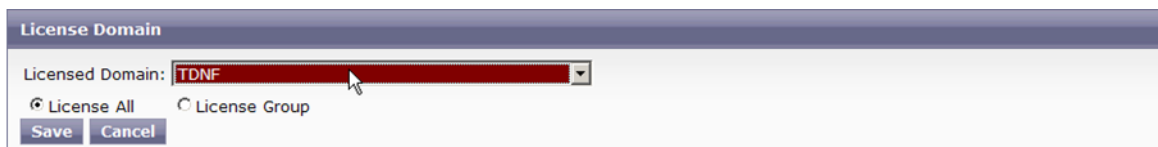
All applications must have their licenses activated in order to function. Click the Global Settings tab and then select the License Configuration tab.



AD Self-Service Suite for Active Directory

Quick Start Guide

Each application of the AD Self-Service Suite must be activated separately here. On each of the AD Self-Service applications listed, click the Add Domain button. Click the Licensed Domain drop down and select a domain NetBIOS name to license **every** active user account in the domain. This will include all service accounts. (To license per group membership, please refer to our other product guides and videos.)



Click Save to commit the configuration to the server and activate the domain specified.

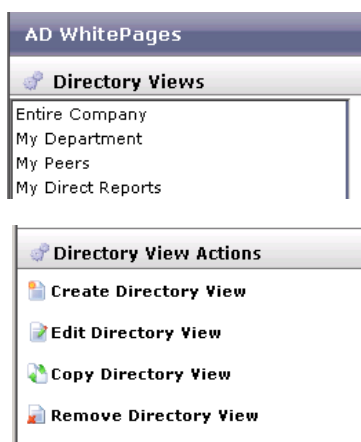
If using Internet Explorer 8 or higher please use the Compatibility Mode

CONFIGURING THE AD WHITEPAGES MINIMAL SETTINGS:

AD WhitePages comes pre-configured with four sample Directory Views. The Directory Views are set to allow read and edit access to all users by default. The only required setting to get AD WhitePages up and running is to add a Directory (a domain and an Organizational Unit root path) under the scope tab.

(You will need to repeat this procedure for each Directory View.)

Click the AD WhitePages tab and then select a Directory View. Click on Edit Directory View.

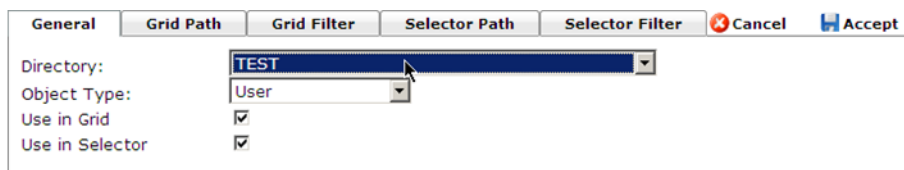


Click the Scope tab and then click the Include Directory button. Select the domain in the Directory drop down and click the Grid Path tab.

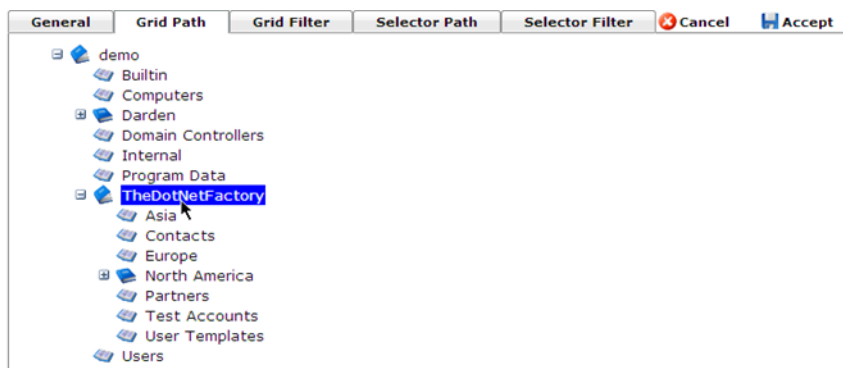


AD Self-Service Suite for Active Directory

Quick Start Guide



Click on the root Organizational Unit you wish to include in the AD WhitePages scope, below which objects of the type selected in the General tab will be displayed. Click on the Selector Path tab and click the root Organizational Unit you wish to be available in the pop up search windows within WhitePages. These two settings are separate OU paths. Once finished, click Accept.



Click Save Directory View under the Directory View Actions pane to commit the configuration to the server.

CONFIGURING THE AD INFO MINIMAL SETTINGS:

The out of the box installation of the AD Self-Service Suite will enable AD Info for use by any users in domains to which you have defined directory connections.

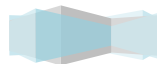
CONFIGURING THE AD PASSWORD MINIMAL SETTINGS:

The out of the box installation of the AD Self-Service Suite will enable AD Password for use by any users in domains to which you have defined directory connections. The default configuration will allow any user to enroll for Password Reset by answering one required, one selectable and one write your own question. These users may also change their password, and recover their account if they become locked-out or forget their passwords. For more detailed configuration instructions please see our other product guides and videos.

DEPLOYING THE AD SELF-SERVICE SHAREPOINT WEB PARTS

Once you have installed the AD Self-Service Suite, you can deploy any of the Suite's web parts on any of your SharePoint sites or pages. All web parts are deployed to the Virtual server gallery if the SharePoint option was selected in the AD Self-Service Configurator.

From the SharePoint page on which you wish to deploy the web part, simply browse the available web parts and add to your page.



AD Self-Service Suite for Active Directory

Quick Start Guide

AD SELF-SERVICE URLS FOR END USERS

WhitePages URLs

- [http\(s\)://<server where AD WhitePages is installed>/ADSelfService/ADWhitePages/](http(s)://<server where AD WhitePages is installed>/ADSelfService/ADWhitePages/)
- AD WhitePages is also available as a web part

AD Info URLs

- [http\(s\)://<server where AD Info is installed>/ADSelfService/ADInfo](http(s)://<server where AD Info is installed>/ADSelfService/ADInfo)
- AD Info is also available to end users as an embedded button in the AD WhitePages user interface.
- AD Info is also available as a web part

Password URLs

- To change passwords or enroll for Password Reset:
- [http\(s\)://<server where AD Password is installed>/ADSelfService/ADPassword/](http(s)://<server where AD Password is installed>/ADSelfService/ADPassword/)
- AD Password is also available to end users as an embedded button in the AD WhitePages user interface.
- AD Password is also available as a web part

To reset their password or unlock their user account:

- [http\(s\)://<server where AD Password is installed>/ADSelfService/RecoveryCenter/](http(s)://<server where AD Password is installed>/ADSelfService/RecoveryCenter/)

Note: the Configurator will automatically redirect users to the Password Reset Center from any web site configured to use it. In most cases users will not have to remember this URL and will automatically be redirected there upon logon failure.

CONCLUSION

Following completion of this QuickStart Guide, your AD Self-Service Server has been configured with the minimal settings necessary for operation. For more detailed configuration instructions, please refer to the individual product configuration guides or the AD Self-Service Suite Architecture Guide.

