



AD Self Service 2.0

User Guide

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Our web site: <http://www.boostsolutions.com>

Contents

| | | |
|-------|--|----|
| 1. | Introduction..... | 1 |
| 2. | Installation..... | 2 |
| 2.1 | Product Files..... | 2 |
| 2.2 | Software Requirements | 3 |
| 2.3 | Installation | 4 |
| 2.4 | Upgrade..... | 6 |
| 2.5 | Uninstallation..... | 6 |
| 2.6 | Command Line Installation | 6 |
| 2.7 | Feature Activation..... | 9 |
| 3. | Configure ADSS in Central Administration | 10 |
| 3.1 | Enter ADSS Settings Page..... | 10 |
| 3.2 | Exclude Users/Groups | 10 |
| 3.3 | Configure Properties..... | 11 |
| 3.4 | Configure Email Notification Settings | 13 |
| 3.5 | Configure Log Settings..... | 15 |
| 3.6 | Configure Custom SMTP Settings..... | 16 |
| 4. | Configure ADSS Web Part | 18 |
| 4.1 | Add ADSS Web Part to a Page | 18 |
| 4.2 | Configure Credentials..... | 19 |
| 4.3 | Manage Tabs | 21 |
| 4.3.1 | Set Tab Height/Width..... | 22 |
| 4.3.2 | Add a Tab | 22 |
| 4.3.3 | Change a Tab Name..... | 23 |
| 4.3.4 | Delete a Tab | 24 |
| 4.3.5 | Adjust the Positions of Tabs | 24 |
| 4.4 | Manage Properties | 25 |
| 4.4.1 | Add a Property | 25 |
| 4.4.2 | Set a Property as Read-Only..... | 27 |
| 4.4.3 | Set Display Styles | 28 |
| 4.4.4 | Manage a Property with Multiple Entries | 30 |
| 4.4.5 | Modify a Property | 32 |

| | | |
|-------|--|----|
| 4.4.6 | Delete a Property | 32 |
| 4.4.7 | Adjust the Positions of Properties..... | 33 |
| 5. | Update Personal AD Properties..... | 34 |
| 6. | Upload User Avatar to the Web Part | 36 |
| 7. | Manage Logs | 38 |
| 8. | Properties Supported | 40 |
| 9. | Troubleshooting & Support | 41 |
| | Appendix: License Management..... | 42 |

1. Introduction

Product Introduction

SharePoint AD Self Service (ADSS) enables administrators to decentralize AD management, allowing authorized users to directly manage AD information. Authorized users are then able to quickly change AD information such as phone numbers, addresses, and email addresses in SharePoint.

Product Feature List

- Allow users to view and edit their personal AD profiles
- Exclude certain users from managing their own AD information
- AD properties can be set as editable or read-only
- Properties & tabs can be added or removed by the administrators from within the web part
- Send email notifications to system administrators or managers once properties have been changed
- Record all AD property changes and change attempts in log files
- Support three property display styles including text box, drop-down list and lookup
- Allow users to modify properties with multiple entries
- Allow users to upload thumbnail photos

About this User Guide

This user guide is intended to instruct you on how to install/uninstall, configure and use SharePoint AD Self Service. For the latest copy of this user guide and some other guides, please visit

<http://www.boostsolutions.com/download-documentation.html>

2. Installation

2.1 Product Files

After you download and unzip the AD Self Service zip file from www.boostsolutions.com, you will find the following files:

| Path | Descriptions |
|---|--|
| Setup.exe | A program that installs and deploys the WSP solution packages to the SharePoint farm. |
| EULA.rtf | The product End-User-License-Agreement. |
| AD Self Service_V2_User Guide.pdf | User guide for AD Self Service in PDF format. |
| Library\2.0\Setup.exe | The product installer for .Net Framework 2.0. |
| Library\2.0\Setup.exe.config | A file that contains the configuration information for the installer. |
| Library\4.0\Setup.exe | The product installer for .Net Framework 4.0. |
| Library\4.0\Setup.exe.config | A file that contains the configuration information for the installer. |
| Library\6.0\Setup.exe | The product installer for .Net Framework 4.6. |
| Library\6.0\Setup.exe.config | A file that contains the configuration information for the installer. |
| Solutions\Foundation\BoostSolutions.FoundationSetup14.1.wsp | A SharePoint solution package that contains Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010. |
| Solutions\Foundation\BoostSolutions.FoundationSetup15.1.wsp | A SharePoint solution package that contains Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013. |
| Solutions\Foundation\BoostSolutions.FoundationSetup16.1.wsp | A SharePoint solution package that contains Foundation files and resources for SharePoint 2016/2019. |
| Solutions\Foundation\Install.config | A file that contains the configuration information for the installer. |
| Solutions\ADSelfService\BoostSolutions.ADSelfServiceSetup14.2.wsp | A SharePoint solution package that contains AD Self Service files and resources for SharePoint 2010 or SharePoint Foundation 2010. |

| | |
|---|--|
| Solutions\ADSelfService\BoostSolutions.ADSelfServiceSetup15.2.wsp | A SharePoint solution package that contains AD Self Service files and resources for SharePoint 2013 or SharePoint Foundation 2013. |
| Solutions\ADSelfService\BoostSolutions.ADSelfServiceSetup16.2.wsp | A SharePoint solution package that contains AD Self Service files and resources for SharePoint 2016/2019. |
| Solutions\ADSelfService\Install.config | A file that contains the configuration information for the installer. |

2.2 Software Requirements

Before you install AD Self Service, ensure your system meets the following requirements:

SharePoint 2019

| | |
|------------------|---|
| Operating System | Windows Server 2016 Standard or Datacenter Windows Server 2019 Standard or Datacenter |
| Server | Microsoft SharePoint Server 2019 |
| Browser | Microsoft Internet Explorer 11 or greater Microsoft Edge Mozilla Firefox Google Chrome |

SharePoint 2016

| | |
|------------------|--|
| Operating System | Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2016 Standard or Datacenter |
| Server | Microsoft SharePoint Server 2016 Microsoft .NET Framework 4.6 |
| Browser | Microsoft Internet Explorer 10 or greater Microsoft Edge Mozilla Firefox Google Chrome |

SharePoint 2013

| | |
|------------------|--|
| Operating System | Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2008 R2 SP1 |
|------------------|--|

| | |
|---------|--|
| Server | Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013 Microsoft .NET Framework 4.5 |
| Browser | Microsoft Internet Explorer 8 or greater Microsoft Edge Mozilla Firefox Google Chrome |

SharePoint 2010

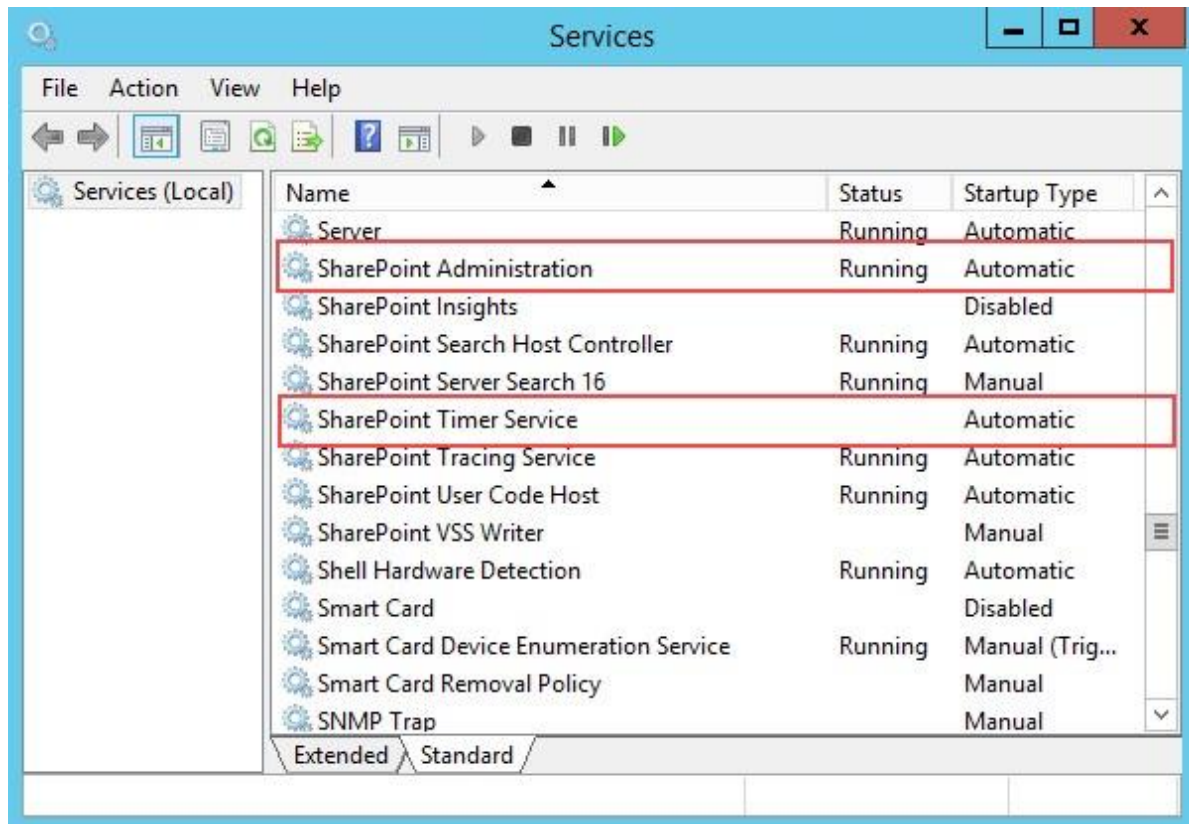
| | |
|------------------|--|
| Operating System | Microsoft Windows Server 2008 x64 Microsoft Windows Server 2008 R2 |
| Server | Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010 Microsoft SharePoint Foundation 2010 SP1 or Microsoft SharePoint Server 2010 SP1 Microsoft .NET Framework 3.5 |
| Browser | Microsoft Internet Explorer 7 or greater Mozilla Firefox Google Chrome |

2.3 Installation

Follow these steps to install AD Self Service on your SharePoint servers.

Installation Preconditions

Before you start installing the product, please make sure these services are started on your SharePoint servers: **SharePoint Administration** and **SharePoint Timer Service**.



AD Self Service must be run on one front-end Web server in the SharePoint farm where **Microsoft SharePoint Foundation Web Application services** are running. Check **Central Administration** → **System Settings** for a list of servers running this service.

Required Permissions

To perform this procedure, you must meet either of the following requirements:

- Member of the local server's **Administrators** group.
- Member of the **Farm Administrators** group.

Install AD Self Service on SharePoint Server

- Download the zip file (*.zip) of the product of your choice from the BoostSolutions website, then extract the file.
- Open the created folder and run the **Setup.exe** file.

Note

If you cannot run the setup file, please right click the **Setup.exe** file and choose **Run as administrator**.

- c. A system check is performed to verify if your machine meets all the requirements for installing the product. After the system check is finished, click **Next**.
- d. Review and accept the End-User License Agreement and click **Next**.
- e. In the **Web Application Deployment Targets**, select the web applications you are going to install and click **Next**.

Note

If you select **Automatically activate features**, the product features will be activated in the target site collection during the installation process. If you want to manually activate the product feature later, uncheck this box.

- f. Upon completion of the installation, details are displayed showing which web applications your product has been installed to. Click **Close**.

2.4 Upgrade

Download the latest version of our product and run the **Setup.exe** file.

In the **Program Maintenance** window, select **Upgrade** and click **Next**.

2.5 Uninstallation

If you want to uninstall the product, double-click the **Setup.exe** file.

In the **Repair or Remove** window, select **Remove** and click **Next**. Then the application will be removed.

2.6 Command Line Installation

The following instructions are for installing the solution files for AD Self Service in **SharePoint 2010** by using the SharePoint STSADM command line tool.

Required permissions

To use STSADM, you must be a member of the local Administrators group on the server.

Install AD Self Service on SharePoint Server

If you have installed BoostSolutions products before, please skip the steps of Foundation installation.

- a. Extract the files from the product zip pack to a folder on one SharePoint server.
- b. Open a command prompt and make sure your path is set with the SharePoint bin directory.

- **SharePoint 2016**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\16\BIN

- **SharePoint 2013**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\BIN

- **SharePoint 2010**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\BIN

- c. Add the solution files to SharePoint in the STSADM command line tool.

```
stsadm -o addsolution -filename BoostSolutions.ADSelfServiceSetup16.2.wsp
stsadm -o addsolution -filename BoostSolutions.FoundationSetup16.1.wsp
```

- d. Deploy the added solution with the following command:

```
stsadm -o deploysolution -name BoostSolutions.ADSelfServiceSetup16.2.wsp -
allowgacdeployment -url [virtual server url] -immediate
stsadm -o deploysolution -name BoostSolutions.FoundationSetup16.1.wsp -
allowgacdeployment -url [virtual server url] -immediate
```

- e. Wait for the deployment to complete. Check the final status of the deployment with this command:

```
stsadm -o displaysolution -name BoostSolutions.ADSelfServiceSetup16.2.wsp
stsadm -o displaysolution -name BoostSolutions.FoundationSetup16.1.wsp
```

The result should contain a <Deployed> parameter for which the value is TRUE.

- f. In the STSADM tool, activate the features.

```
stsadm -o activatefeature -name Brandysoft.SharePoint.ADSelfService -url [site collection url]
-force
stsadm -o activatefeature -name Brandysoft.SharePoint.ADSelfServiceAdmin -url [virtual server
```

```
url] -force
```

Remove AD Self Service from SharePoint Servers

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.ADSelfServiceSetup16.2.wsp -immediate -url  
[virtual server url]
```

- b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

```
stsadm -o displaysolution -name BoostSolutions.ADSelfServiceSetup16.2.wsp
```

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

- c. Remove the solution from the SharePoint solutions storage:

```
stsadm -o deletesolution -name BoostSolutions.ADSelfServiceSetup16.2.wsp
```

Remove BoostSolutions Foundation from SharePoint Servers

The BoostSolutions Foundation is mainly designed to provide a centralized interface to manage licenses for all BoostSolutions software from within SharePoint Central Administration. If are still using BoostSolutions product on your SharePoint server, please do not remove Foundation from the servers.

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.FoundationSetup16.1.wsp -immediate -url  
[virtual server url]
```

- b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

```
stsadm -o displaysolution -name BoostSolutions.FoundationSetup16.1.wsp
```

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

- c. Remove the solution from the SharePoint solutions storage:


```
stsadm -o deletesolution -name BoostSolutions.FoundationSetup16.1.wsp
```

2.7 Feature Activation

Activate Feature in Site Collection


By default, the application's features are automatically activated once the product is installed. You can also activate the product feature manually.

- a. On the **Site Actions** menu, click **Site Settings**.
- b. Under **Site Collection Administration**, click **Site collection features**.
- c. Find the application feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.

| | | | |
|---|---|------------|--------|
|  | BoostSolutions AD Self Service 2.10.318.0 Enables users to view and modify their own AD account information. (Powered by BoostSolutions) | Deactivate | Active |
|---|---|------------|--------|

Activate Feature in Central Administration

- a. Enter Central Administration, on the Quick Lunch, click **System Settings**.
- b. On the System Settings page, under Farm Management, click **Manage farm features**.
- c. Find AD Self Service's features and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.

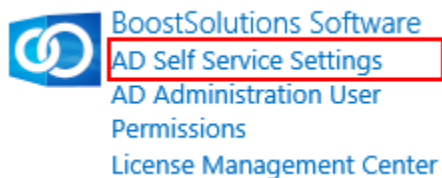
| | | | |
|---|---|------------|--------|
|  | BoostSolutions AD Self Service 2.9.1114.0 Enables users to view and modify their own AD account information. (Powered by BoostSolutions) | Deactivate | Active |
|---|---|------------|--------|

3. Configure ADSS in Central Administration

To configure AD Self Service settings in Central Administration, you must be a member of the **farm administrators** group.

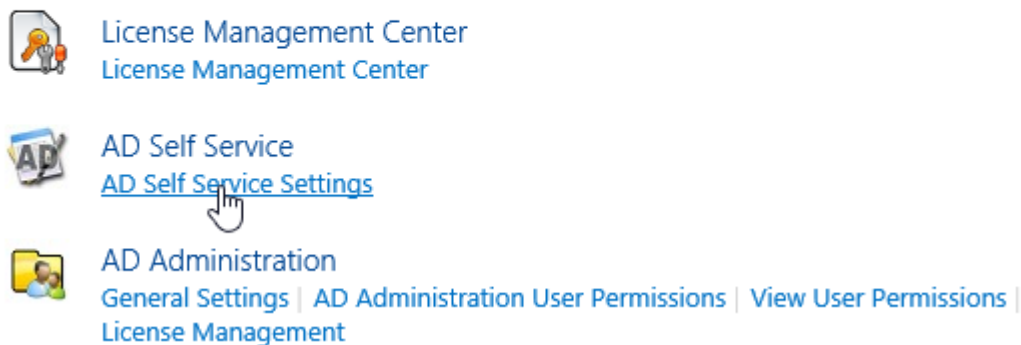
3.1 Enter ADSS Settings Page

On the Central Administration page, click **AD Self Service Settings** under **BoostSolutions Software**.



Or on the Quick Launch, click **BoostSolutions Software**, and then click **AD Self Service Settings** under **AD Self Service**.

BoostSolutions Software



3.2 Exclude Users/Groups

This allows you to secure AD property changes by excluding users like interns, contractors, freelancers or other short-term employees from accessing the ADSS Web Part.

- a. Enter the names of active directory groups or users to be excluded in the **Exclude Users/Groups** box, or find their names via the directory.


Exclude Users/Groups

Specify the AD users/groups that will not be able to view or change AD information in the AD Self Service web part.

Excluded Users/Groups

Henry Lee; BR\document team



- b. Click the  icon to verify the names.

3.3 Configure Properties

By default, AD Self Service provides predefined properties for users to modify. Administrator can also add other active directory properties. All property configurations in Central Administration can be retained during product upgrade.

To add a property:

- a. Enter **Central Administration > AD Self Service Settings** and click the **Add** button in the **Include Properties** section.
- b. In the **Add New Property** dialog, enter the **Display Name** and the **Property Name** then click **OK** to confirm your operation.
 - **Display Name:** Type the name you want to show on the AD Self Service web part.
 - **Property Name:** Type the property's LDAP name.

Note

If the property name entered does not match the one in the AD, then an error will occur when you add a property in the Tabs for ADSS Web Part configuration in site collections.

To modify a property:

- a. In the **Include Properties** section, select an available property.

Include Properties

Specify properties that can be added to the web part.

Properties:

| |
|----------------------------|
| City:(l) |
| Company:(company) |
| Country/Region:(co) |
| Department:(department) |
| Description:(description) |
| Display Name:(displayName) |

Display Name:

Property Name:

| | | | |
|-----|--------|--------|-----------------|
| Add | Modify | Remove | Restore Default |
|-----|--------|--------|-----------------|

- b. Specify the Display Name or Property Name then click **Modify**.

Include Properties

Specify properties that can be added to the web part.

Properties:

| |
|------------------------------------|
| P.O. Box:(postOfficeBox) |
| Pager:(pager) |
| Picture:(thumbnailPhoto) |
| State/Province:(st) |
| Street:(streetAddress) |
| Telephone Number:(telephoneNumber) |

Display Name:

Property Name:

| | | | |
|-----|---------------|--------|-----------------|
| Add | Modify | Remove | Restore Default |
|-----|---------------|--------|-----------------|

To remove a property:

In the **Include Properties** section, select a property which you want to remove and click **Remove**.

Include Properties

Specify properties that can be added to the web part.

Properties:

| |
|--------------------------------|
| Fax:(facsimileTelephoneNumber) |
| First Name:(givenName) |
| Home Phone:(homePhone) |
| Initials:(initials) |
| IP Phone:(ipphone) |
| Last Name:(sn) |

Display Name:

Property Name:

| | | | |
|-----|--------|---------------|-----------------|
| Add | Modify | Remove | Restore Default |
|-----|--------|---------------|-----------------|

To restore default properties:

Administrators can add, remove or change properties in Central Administration. With **Restore Default** properties, they can get all predefined properties back.

To reload the default property configurations, click **Restore Default**.

Include Properties

Specify properties that can be added to the web part.

Properties:

| |
|--------------------------------|
| Fax:(facsimileTelephoneNumber) |
| First Name:(givenName) |
| Home Phone:(homePhone) |
| Initials:(initials) |
| IP Phone:(ipphone) |
| Last Name:(sn) |

Display Name:

Property Name:

Note

Restoring default properties will result in the loss of changes in the property settings.

3.4 Configure Email Notification Settings

This function allows you to configure a confirmation email to be sent to administrators after users have changed their AD information. To enable this function, select the **AD Self Service Email Confirmation** check box.

To enable this function, check the box next to **AD Self Service Email Confirmation**


AD Self Service E-Mail Confirmation

Send a confirmation email to the administrator after users have changed their AD information.

Email Content

Subject:

Message:



[Default Message]

Send message in HTML format

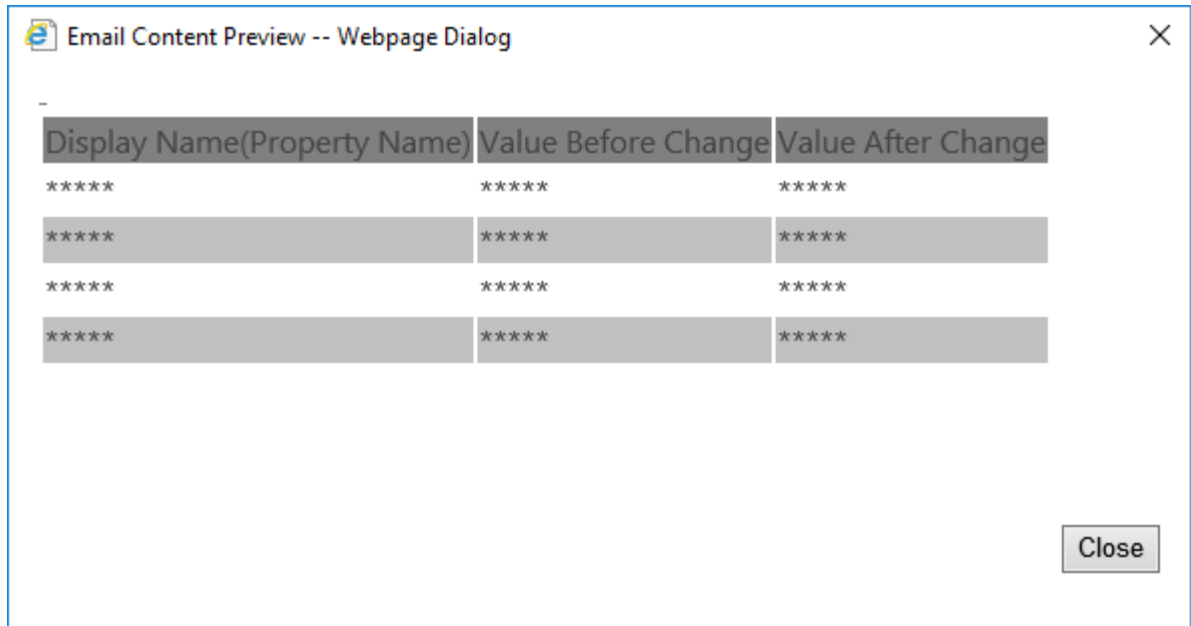
Specify Email Recipients:

Recipient email address(es) (separate email addresses with a comma):

- **Subject:** Specify the subject of the message.
- **Message:** Type the e-mail message. You can specify the message format as HTML format or Plain text by selecting the checkbox next to **Send message in HTML format**.
- **HTML format:** Compose the message with various fonts, colors and bullet lists.



- **Plain text format:** This format don't support bold, italic, colored fonts or other text formatting.
- **Insert Expression:** Insert the the preset expressions in your message.
- **Default Message:** Insert a table summarizing all changes made to the properties.
- **Current Date & Time:** Insert the date and time when the properties were changed.
- **Current User:** Insert the name of the user who modified the properties.
- **Send message in HTML format:** Specify whether to send the message in HTML format; the default choice sends the message in Plain text.
- **Preview:** Preview the message content.



- **Specify Email Recipients:** Enter the email address of administrators or users who notifications will be sent to; separate user names with a comma.

Specify Email Recipients:

Recipient email address(es) (separate email addresses with a comma):

admin@crystal.local

Note Recipient email address(es) could either be an administrator's email address or the email addresses of any other users (e.g. managers or supervisors).

3.5 Configure Log Settings

This function tracks the property changes or modifications made by users. To enable the log function, select the **Enable AD Property Change Log** check box.

Enable AD Property Change Log

Write log file on the server when users change their AD information.

AD Property Change Log Schedule Options:

Monthly

Every days

Delete log from the server after days

Log schedule options:

- **Monthly:** Record logs every month.
- **Every n days:** Generate a log file every n days.
- **Delete log from the server after n days:** Administrator can decide when and whether log files should be deleted. To enable this function, check this check box and specify the number of days. Logs will be deleted after the number of days specified.

To view and manage logs, please see [7. Manage Logs](#) for details.

3.6 Configure Custom SMTP Settings

Change these settings if you want custom settings for outgoing emails.

SMTP domain name or IP address:

Port:

From display name (this will be displayed in the From field of each email notification):

From address (this will be set as the default From address for each email notification):

Reply-to address (this will be set as the default reply-to address for each email notification):

Use default Windows user login credentials

Use custom user login credentials

User Name:

Password:

Enable SSL connection

- **SMTP domain name or IP address:** Enter the name or IP address of your email server.
- **Port:** Enter the port number.
- **From display name:** Enter the display name for the "From" field (optional).
- **From address:** Enter an email address.
- **Reply-to address:** Enter an email address (optional).
- **Credentials:** Configure the credentials to connect your server.

- **Send Test Email:** Test if the email can be sent successfully.


Note

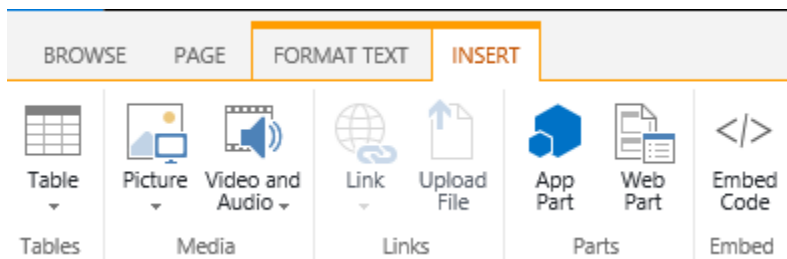
You don't need to customize these settings if the SMTP server settings are already configured in SharePoint Central Administration.

4. Configure ADSS Web Part

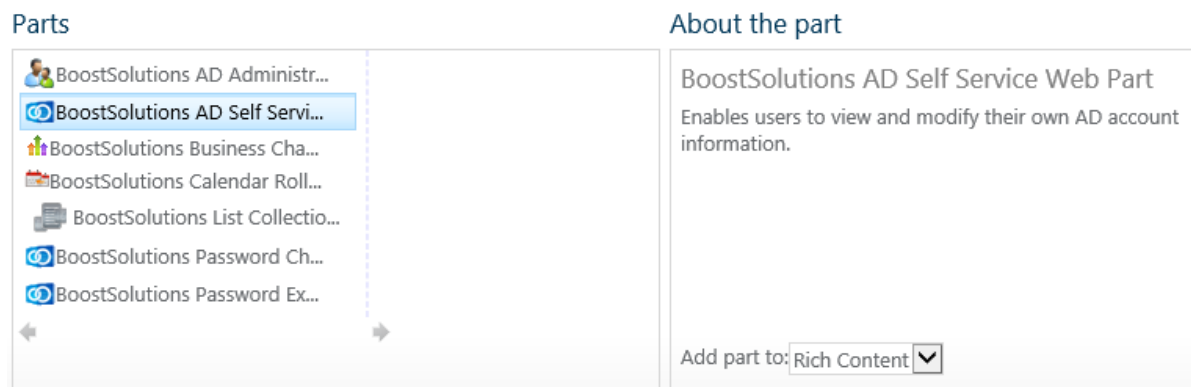
To add or configure the AD Self Service web part, you must have **Full Control** or **Design** permission level.

4.1 Add ADSS Web Part to a Page

- a. Go to the page where you would like to add AD Administration Web Part. Click **Settings**  and then click **Edit Page**. On the ribbon, click **Insert** under the **Editing Tools** tab, and then click **Web Part**.




- b. In the **Categories** section, click **BoostSolutions Web Parts**, select **BoostSolutions AD Self Service** from the Web Part list, and then click **Add**.



- c. The ADSS Web Part will be added on the page as follows:

 BoostSolutions AD Self Service Web Part

General Address Telephones Organization

 system

First Name:

Initials:

Last Name:

Display Name:

Description:

Office:

Telephone Number:

E-mail:

Web Page:

Please [open the tool pane](#) to modify account information using AD Self Service.

4.2 Configure Credentials

Note

AD Self Service cannot work properly when multiple domains are involved in the operation.

- Click the link **open the tool pane**. Or click **Edit Web Part** on the Web Part drop-down menu.
- In the **Administrator login credentials** section, enter the username and password to connect to the active directory.

BoostSolutions AD Self Service Web Part

AD Self Service Settings

(Note that some settings must be configured from within SharePoint Central Administration.)

.....

Administrator login credentials

Username

Tom

Password

.....

Note

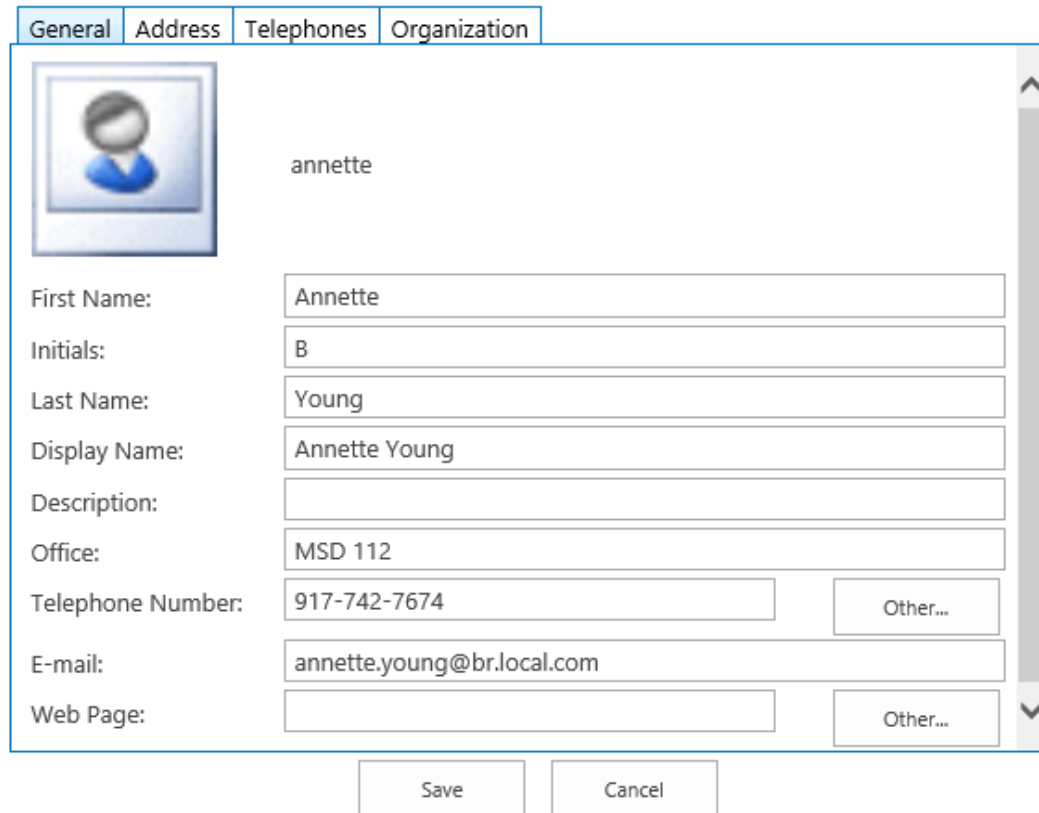
The user must be a member of **Domain Admins**. If the account is not member of **Domain Admins**, any changes made to AD information in the ADSS Web Part will not be saved.



If the account is not member of **Domain Admins**, any changes made to AD information in the ADSS Web Part will not be saved.

BoostSolutions AD Self Service Web Part

General Address Telephones Organization



The form displays user information for 'annette'. It includes a profile picture placeholder, a name field with 'Annette', initials 'B', last name 'Young', and display name 'Annette Young'. Other fields include 'Office: MSD 112', 'Telephone Number: 917-742-7674', and 'E-mail: annette.young@br.local.com'. There are 'Other...' buttons for telephone and web page fields. 'Save' and 'Cancel' buttons are at the bottom.

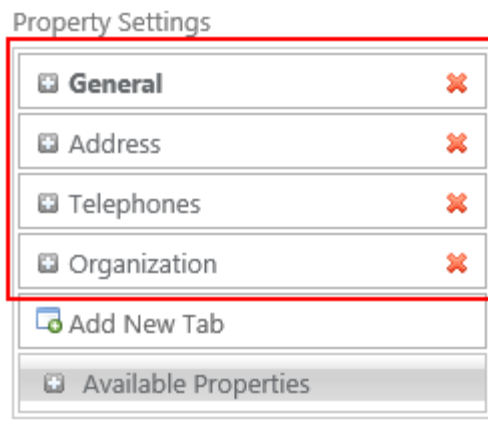
| | | |
|-------------------|----------------------------|----------|
| First Name: | Annette | |
| Initials: | B | |
| Last Name: | Young | |
| Display Name: | Annette Young | |
| Description: | | |
| Office: | MSD 112 | |
| Telephone Number: | 917-742-7674 | Other... |
| E-mail: | annette.young@br.local.com | |
| Web Page: | | Other... |

Save Cancel

Failed to save user information. Please check your AD Self Service account settings. Details: Access is denied.

4.3 Manage Tabs

By default, ADSS provides four tabs (**General**, **Address**, **Telephones** and **Organization**) that include common active directory properties.



4.3.1 Set Tab Height/Width

You can specify the tab height and width. The default value for Tab height is 380 and width is 560.

.....

Tab Height

 Pixels

.....

Tab Width

 Pixels

4.3.2 Add a Tab

- a. To add a tab, click **Add New Tab**.

Property Settings

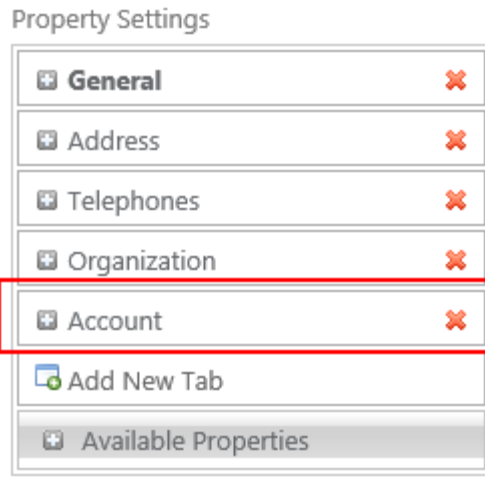
| |
|----------------------|
| General |
| Address |
| Telephones |
| Organization |
| Add New Tab |
| Available Properties |

- b. In the text box, enter the tab name.

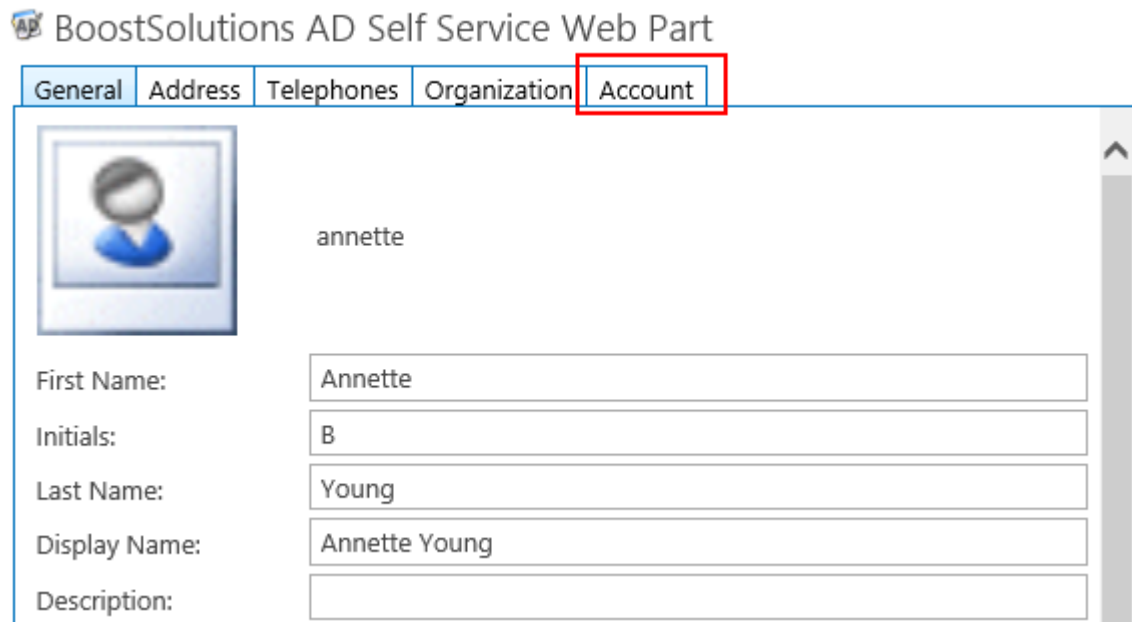
Property Settings

| |
|----------------------|
| General |
| Address |
| Telephones |
| Organization |
| <input type="text"/> |
| Available Properties |

- c. Press the **Enter** key and the tab is added.

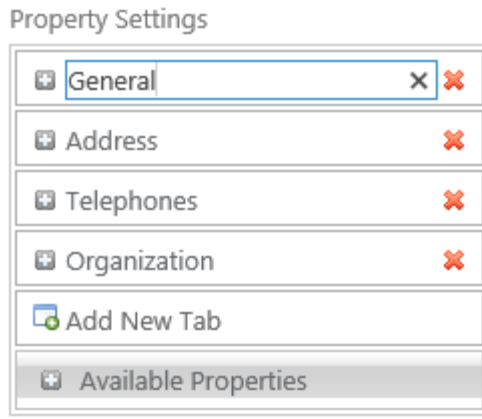


- d. Click **OK** in the ADSS Web Part configuration panel and the tab is added as follows:




4.3.3 Change a Tab Name

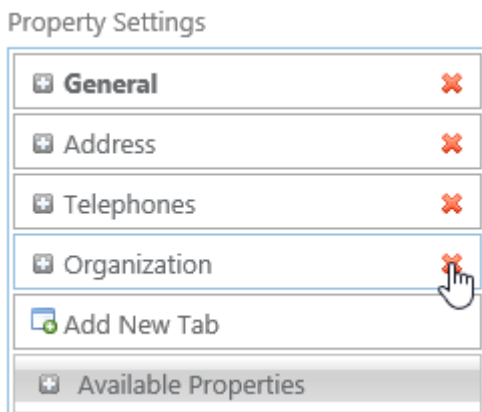
- a. Click on the name of the tab.



- b. The field will become editable. Enter a new tab name and press the **Enter** key to confirm.

4.3.4 Delete a Tab

Click the delete icon  on the right side of a tab to delete the tab. A confirmation message will appear. Click **OK** if you are confirmed with the deletion.

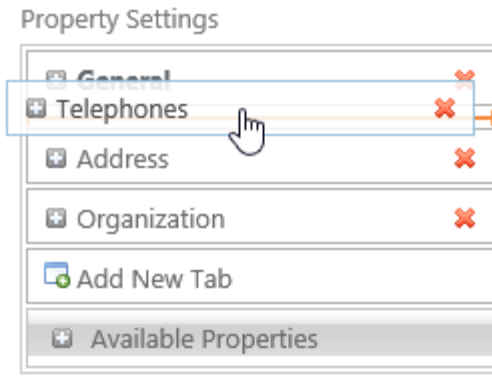


Note

The properties under the tab will not be deleted with the deletion of the tab; you can find these properties under **Available Properties**.


4.3.5 Adjust the Positions of Tabs

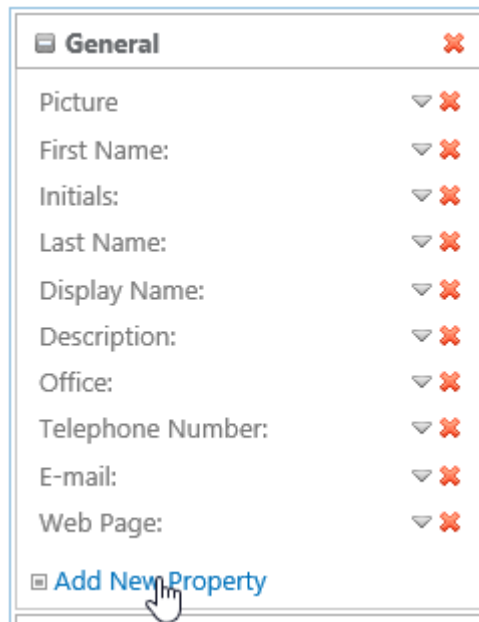
You can drag and drop tabs to adjust their positions on the Web Part.



4.4 Manage Properties

4.4.1 Add a Property

- Click the expand icon  to expand a tab which you want to add new properties to.
- Under properties, click **Add New Property**.



- Choose a property you want to add.

Add Property

Choose Property to Add:

Employee ID(employeeid)
User logon name(\\maccountname)

Property Name
employeeid

Display Name
Employee ID

Note

The properties available to be inserted are shown under Available Properties, which contains the properties you added when you configured ADSS in **Central Administration > AD Self Service Settings** and the properties you deleted in the tab. If the property you want to add is not listed, please add it in Central Administration first.

- d. Configure relevant settings for this property.

Add Property

Choose Property to Add:

Employee ID(employeeid) ▼

Property Name
employeeid

Display Name
Employee ID

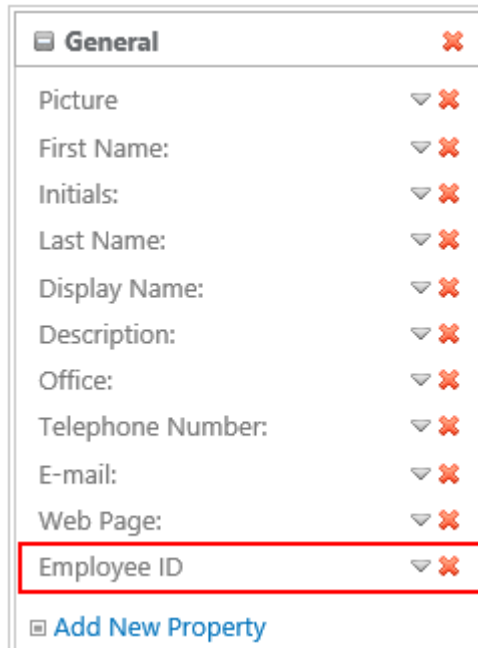
Allow users to edit this property

Appearance

Display Style
Text box ▼

Rows
1

- e. Click the **Add** button to save your settings.

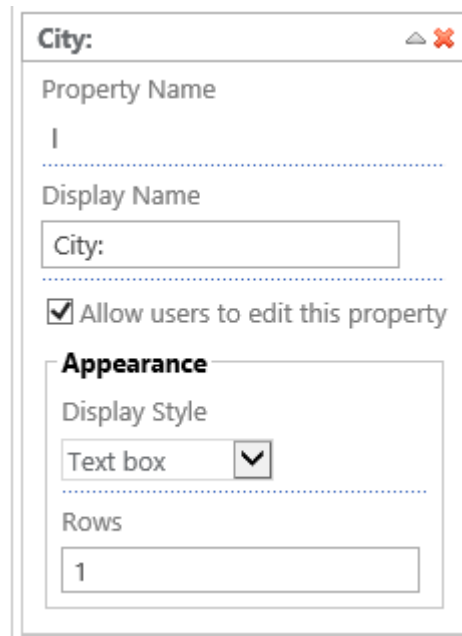


| Property Name | Dropdown Arrow | Close Icon |
|--------------------|----------------|------------|
| Picture | ▼ | ✖ |
| First Name: | ▼ | ✖ |
| Initials: | ▼ | ✖ |
| Last Name: | ▼ | ✖ |
| Display Name: | ▼ | ✖ |
| Description: | ▼ | ✖ |
| Office: | ▼ | ✖ |
| Telephone Number: | ▼ | ✖ |
| E-mail: | ▼ | ✖ |
| Web Page: | ▼ | ✖ |
| Employee ID | ▼ | ✖ |

[Add New Property](#)

4.4.2 Set a Property as Read-Only

- Click the down-down arrow ▼ on the right side of one property to expand the property settings.



City: ▲ ✖

Property Name
I

Display Name
City:

Allow users to edit this property

Appearance

Display Style
Text box ▼

Rows
1

- Clear the **Allow users to edit this property** check box to make it read-only.

City:

Property Name
City

Display Name
City:

Allow users to edit this property

Appearance

Display Style
Text box

Rows
1

4.4.3 Set Display Styles

The following settings allow you to specify how users can enter their AD property information, by entering text in the text box or by selecting values from the drop-down list or lookup column.

Appearance

Display Style

Text box
Dropdown list
Lookup

Rows
1

Text Box Style

Allow users to modify properties in the text box; you can set the number of rows for the text box of a property.

Appearance

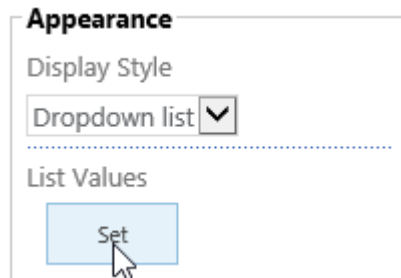
Display Style
Text box

Rows
3

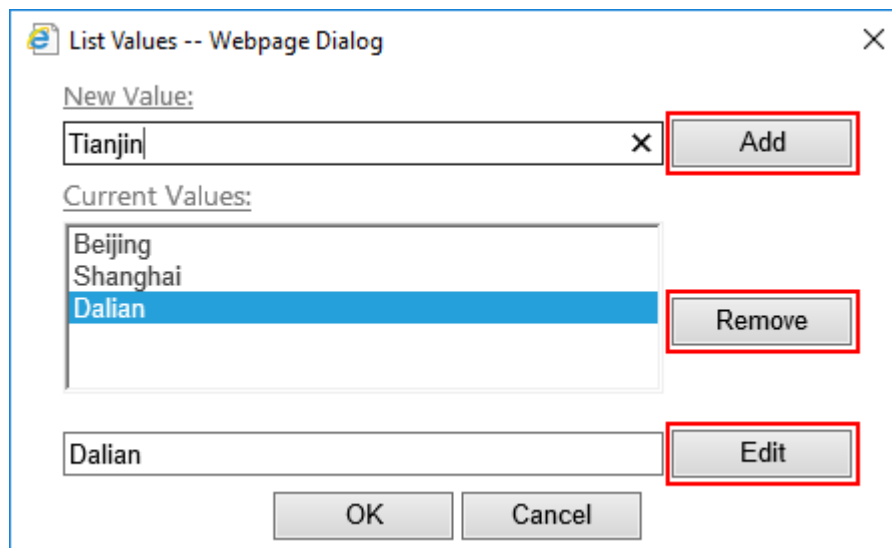
Dropdown List Style

You can set customized predefined values into a dropdown menu for users to choose.

- a. Select a Drop-down list and click the **Set** button.



- b. In the **New Value** text box, enter a value then click the **Add** button.



Click **Remove** to

remove a specified value.

Click **Edit** to modify a specified value.

Lookup Style

You can specify the columns from which to pull values from any list in any site over the current site collection as predefined choices.

The screenshot shows a window titled "Title:" with a close button (X) and a maximize button (triangle). The window contains the following fields and options:

- Property Name:** title
- Display Name:** Title: (text input)
- Allow users to edit this property
- Appearance** section:
 - Display Style:** Lookup (dropdown)
 - Website:** BoostSolutions (dropdown)
 - List:** Employee Info list (dropdown)
 - Column:** Job Title (dropdown)

4.4.4 Manage a Property with Multiple Entries

There are many properties in active directory with multiple entries, such as mobile, telephone number, and so on. AD Self Service provides users with the capability to modify multiple entries.

- Find a property with multiple entries and expand the property settings section.
- Select the **Allow multiple entries** check box.

Allow multiple entries

- In the **Additional Entry** section, specify the display name and select the **Allow users to edit this additional entry** check box.

Additional Entry

Display Name for additional entry

Telephone (Others)

Allow users to edit this additional entry


Note

The following properties allow users to modify multiple entries: Telephone number, Web page, Home Phone, Pager, Mobile Phone, Fax and IP phone.

- d. Click **OK** to save your settings.

 BoostSolutions AD Self Service Web Part

General Address Telephones Organization

 annette

First Name: Annette

Initials: B

Last Name: Young

Display Name: Annette Young

Description:

Office: MSD 112

Telephone Number: 917-742-7674 Other...

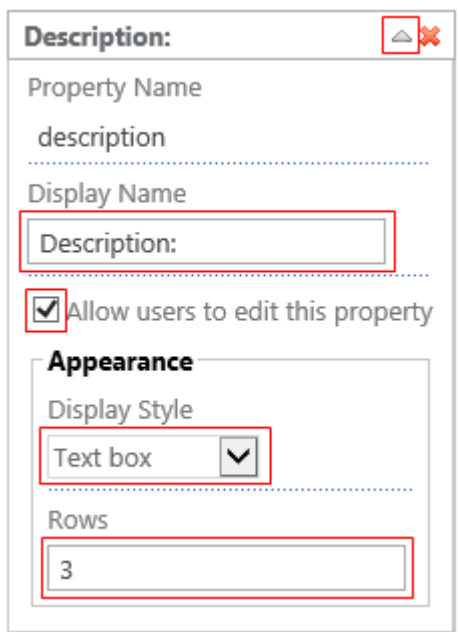
E-mail: annette.young@br.local.com

Web Page: Other...

Save Cancel

4.4.5 Modify a Property


You can modify a property such as its **Display Name** and **Appearance**.

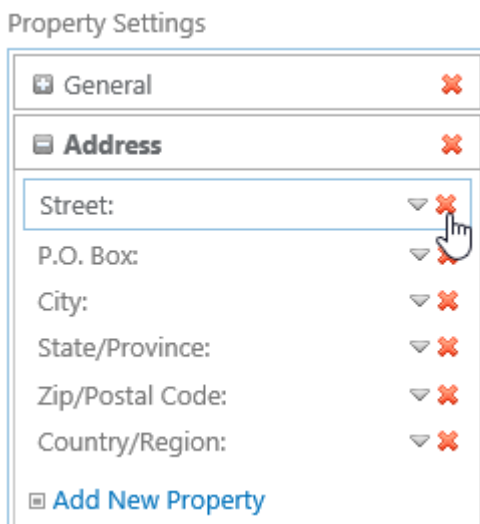


The screenshot shows a dialog box titled "Description:" with a close icon (X) in the top right corner. The dialog contains the following fields and options:

- Property Name:** A text field containing "description".
- Display Name:** A text field containing "Description:", which is highlighted with a red box.
- Allow users to edit this property**
- Appearance:** A section with a title bar and a close icon (X).
 - Display Style:** A dropdown menu showing "Text box", which is highlighted with a red box.
 - Rows:** A text field containing "3", which is highlighted with a red box.

4.4.6 Delete a Property

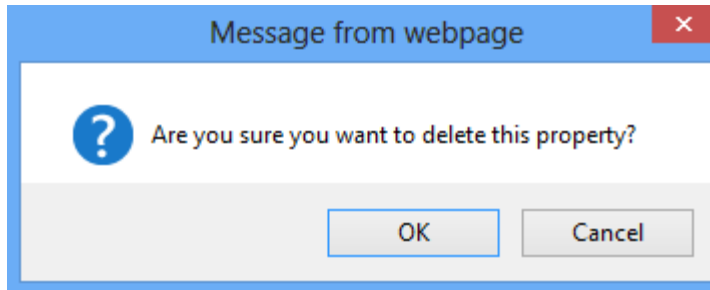
- Select one property and click the delete icon  on the right side of the property.



The screenshot shows a dialog box titled "Property Settings" with a close icon (X) in the top right corner. The dialog contains the following sections and options:

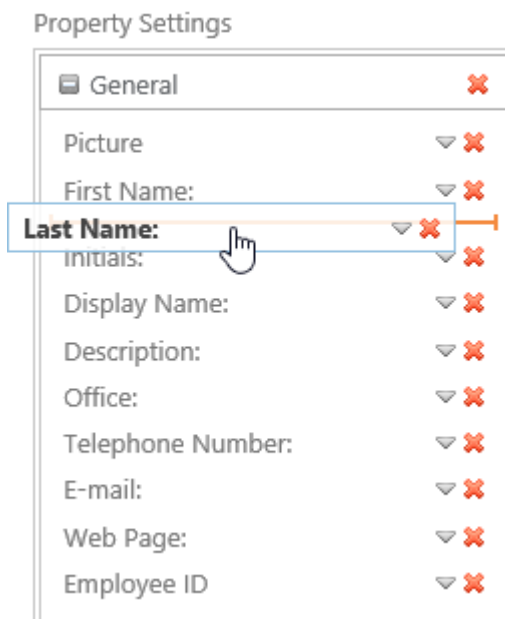
- General:** A section with a title bar and a close icon (X).
- Address:** A section with a title bar and a close icon (X).
 - Street:** A dropdown menu with a close icon (X) and a mouse cursor pointing to it.
 - P.O. Box:** A dropdown menu with a close icon (X).
 - City:** A dropdown menu with a close icon (X).
 - State/Province:** A dropdown menu with a close icon (X).
 - Zip/Postal Code:** A dropdown menu with a close icon (X).
 - Country/Region:** A dropdown menu with a close icon (X).
- Add New Property:** A blue link with a plus icon.

- A confirmation message will appear as follows. Click **OK**.



4.4.7 Adjust the Positions of Properties

You can drag and drop the properties to adjust their positions within a tab.




5. Update Personal AD Properties

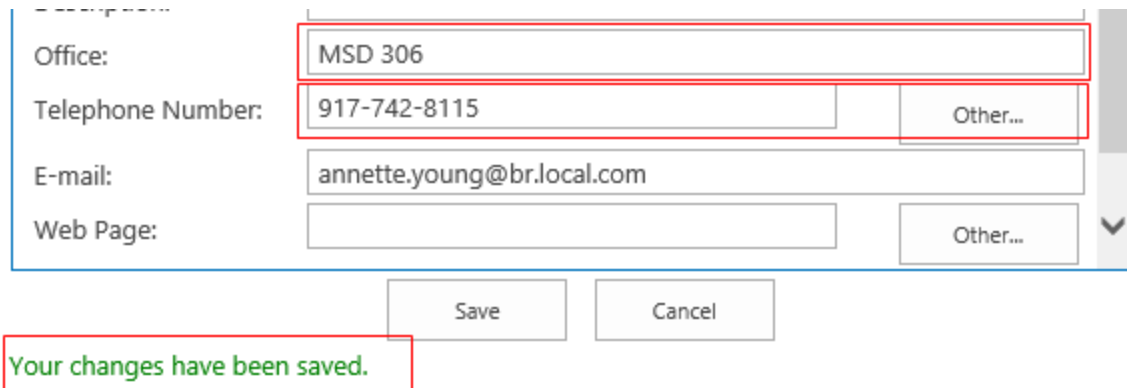
After the web part is configured, SharePoint end users can modify their active directory information through ADSS Web Part.

- a. Log onto the site where ADSS Web Part is added.
- b. Modify AD information on the ADSS Web Part.

BoostSolutions AD Self Service Web Part

| General | Address | Telephones | Organization |
|--|---|---|--------------|
|  | annette | | |
| First Name: | <input type="text" value="Annette"/> | | |
| Initials: | <input type="text" value="B"/> | | |
| Last Name: | <input type="text" value="Young"/> | | |
| Display Name: | <input type="text" value="Annette Young"/> | | |
| Description: | <input type="text"/> | | |
| Office: | <input type="text" value="MSD 306"/> | | |
| Telephone Number: | <input type="text" value="917-742-8115"/> | <input type="button" value="Other..."/> | |
| E-mail: | <input type="text" value="annette.young@br.local.com"/> | | |
| Web Page: | <input type="text"/> | <input type="button" value="Other..."/> | |

- c. Click **Save**. A message will notify you that the changes have been saved successfully.



Office: MSD 306

Telephone Number: 917-742-8115 Other...

E-mail: annette.young@br.local.com

Web Page: Other...

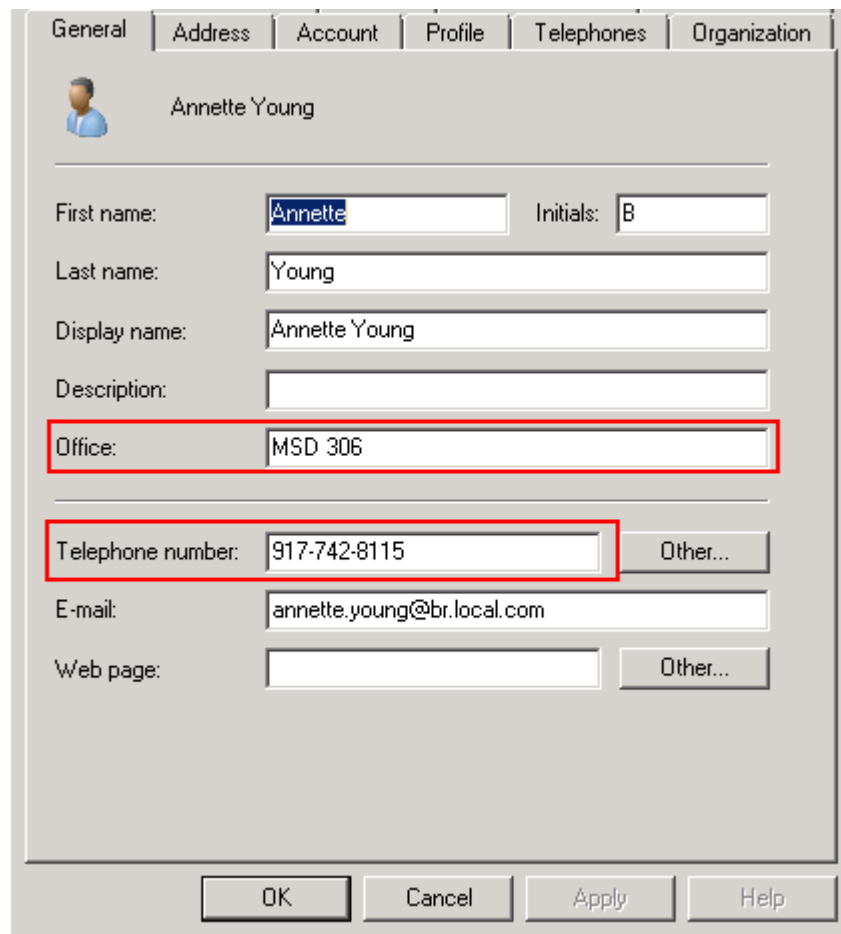
Save Cancel

Your changes have been saved.

The **Save** button might be unavailable under the following circumstances:

- The current user is a system account.
- The current user is not in the same domain with SharePoint server.
- The current user is a form authentication user.

You may check this user property changes in the Active Directory. The changes are updated successfully.



General Address Account Profile Telephones Organization

Annette Young

First name: Annette Initials: B

Last name: Young

Display name: Annette Young

Description:

Office: MSD 306

Telephone number: 917-742-8115 Other...

E-mail: annette.young@br.local.com


Web page: Other...

OK Cancel Apply Help

6. Upload User Avatar to the Web Part

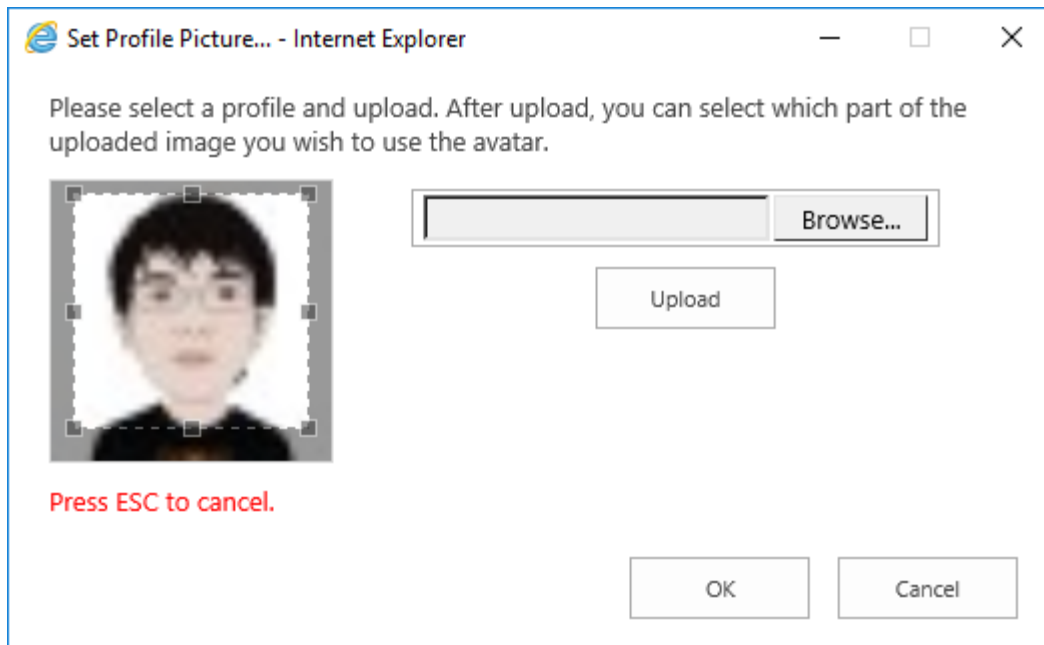
This function allows end users to upload their own avatars from their local computers.

- a. Click on the default user avatar in the ADSS Web Part.

| General | Address | Telephones | Organization |
|---|---|---|--------------|
|  | annette | | |
| First Name: | <input type="text" value="Annette"/> | | |
| Initials: | <input type="text" value="B"/> | | |
| Last Name: | <input type="text" value="Young"/> | | |
| Display Name: | <input type="text" value="Annette Young"/> | | |
| Description: | <input type="text"/> | | |
| Office: | <input type="text" value="MSD 306"/> | | |
| Telephone Number: | <input type="text" value="917-742-8115"/> | <input type="button" value="Other..."/> | |
| E-mail: | <input type="text" value="annette.young@br.local.com"/> | | |
| Web Page: | <input type="text"/> | <input type="button" value="Other..."/> | |


In the **Set Profile Picture** dialog box, click **Browse...** to browse to the location of the photo you want.

- b. Click **Upload**. You can select which part of the photo you wish to use.



If you do not satisfy with the selected part, you can press the **ESC** key to cancel the selection.

- c. Click **OK** to set the photo as your personal avatar. And you will see your avatar on the web part.

| General | Address | Telephones | Organization |
|---|---|---|--------------|
|  | annette | | |
| First Name: | <input type="text" value="Annette"/> | | |
| Initials: | <input type="text" value="B"/> | | |
| Last Name: | <input type="text" value="Young"/> | | |
| Display Name: | <input type="text" value="Annette Young"/> | | |
| Description: | <input type="text"/> | | |
| Office: | <input type="text" value="MSD 306"/> | | |
| Telephone Number: | <input type="text" value="917-742-8115"/> | <input type="button" value="Other..."/> | |
| E-mail: | <input type="text" value="annette.young@br.local.com"/> | | |

Note

Supported picture formats: JPG, BMP, PNG, GIF, etc.

7. Manage Logs

Administrators can be alerted via emails of any modifications of AD information (e.g. an unauthorized user changed password) that could be harmful. They can also track changes or change attempts through log files. Go to **AD Self Service Settings** page, click **View Logs** in the **Enable AD Property Change Log** section.

Enable AD Property Change Log

Write log file on the server when users change their AD information.

AD Property Change Log Schedule Options:

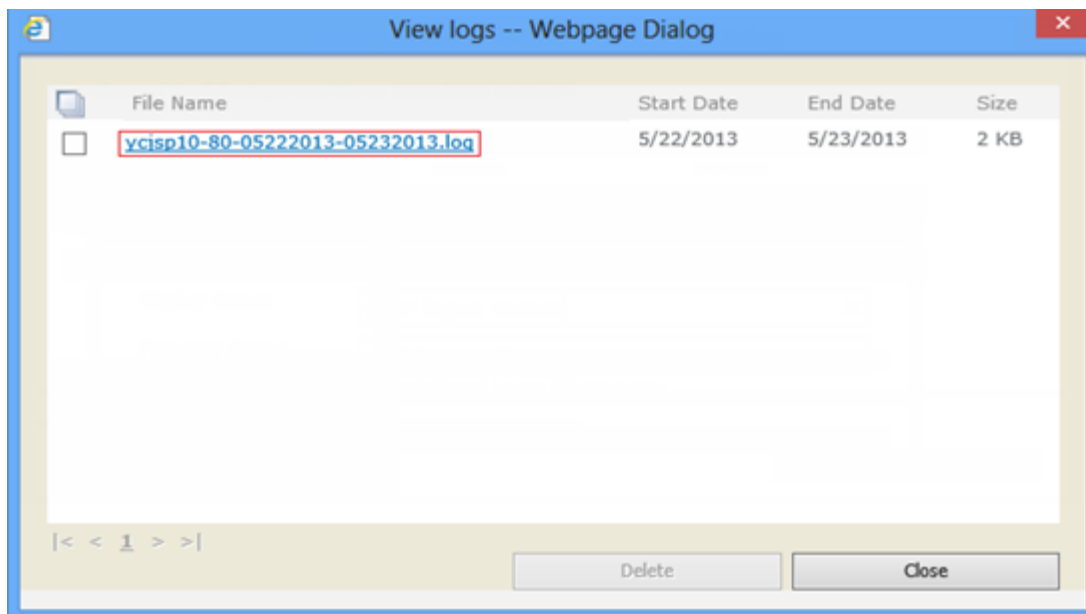
Monthly

Every days

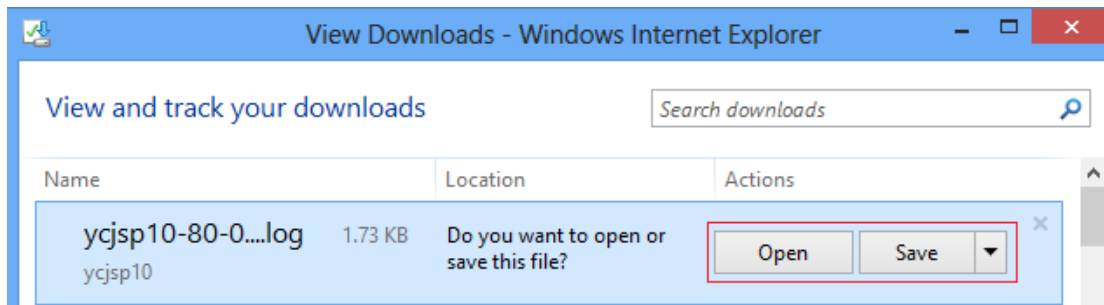
Delete log from the server after days

View Logs

A dialog will open and the log files are displayed with File Name, Start Date, End Date and Size.



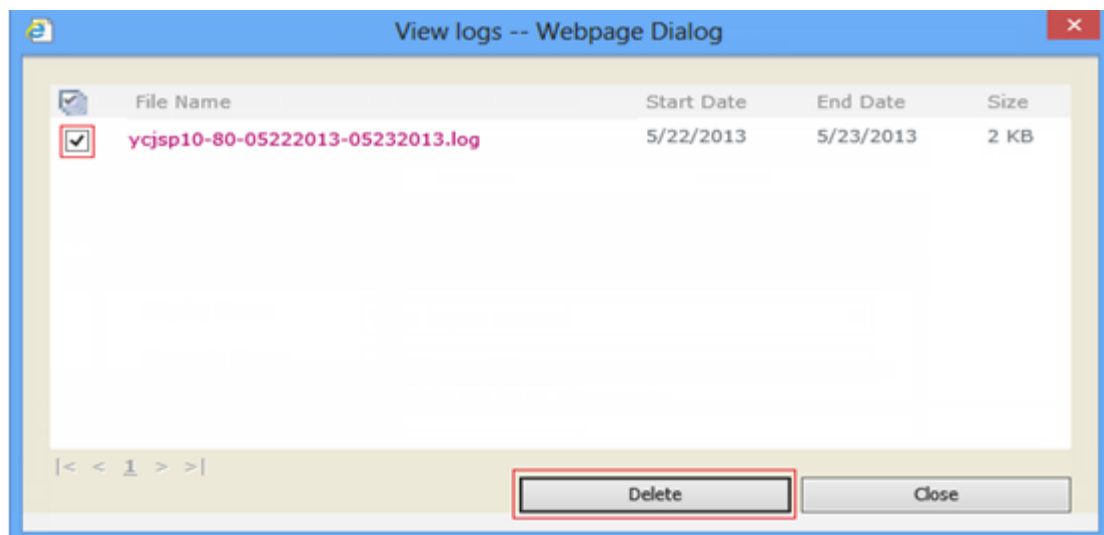
Click on a log file name to open or save it.



Open the log file to check the property change history. You can check the change history including when a property was changed, who changed it, what's the change state, which property was changed and what's the result of the change.



To delete a specified log file, select it and click **Delete**. A confirmation message will appear. Click **OK** if you are confirmed with the deletion.



8. Properties Supported

The properties supported by ADSS are listed in the table below:

| LDAP Name | Display Name |
|----------------------------|------------------|
| thumbnailPhoto | |
| givenName | First name |
| initials | Initials |
| sn | Last name |
| displayName | Display name |
| description | Description |
| physicalDeliveryOfficeName | Office |
| telephoneNumber | Telephone number |
| mail | E-mail |
| wWWHomePage | Web Page Address |
| streetAddress | Street |
| postOfficeBox | P.O. box |
| st | State/province |
| directReports | Direct reports* |
| postalCode | Zip/Postal code |
| co | Country /region |
| homePhone | Home phone |
| pager | Pager Number |
| mobile | Mobile Number |
| facsimileTelephoneNumber | Fax Number |
| ipPhone | IP Phone Number |
| info | Notes |
| title | Job Title |
| department | Department |
| company | Company |
| l | City |
| manager | Manager |

* Property can be shown on the web part, but cannot be modified.

9. Troubleshooting & Support

Troubleshooting FAQ:

<http://www.boostsolutions.com/general-faq.html#Show=ChildTitle9>

Contact Info:

Product & Licensing Inquires: sales@boostsolutions.com

Technical Support (Basic): support@boostsolutions.com

Request a New Product or Feature: feature_request@boostsolutions.com

Live chat:

<http://www.boostsolutions.com/support/chat/livezilla.php?intgroup=U3VwcG9ydA==&reset=true>

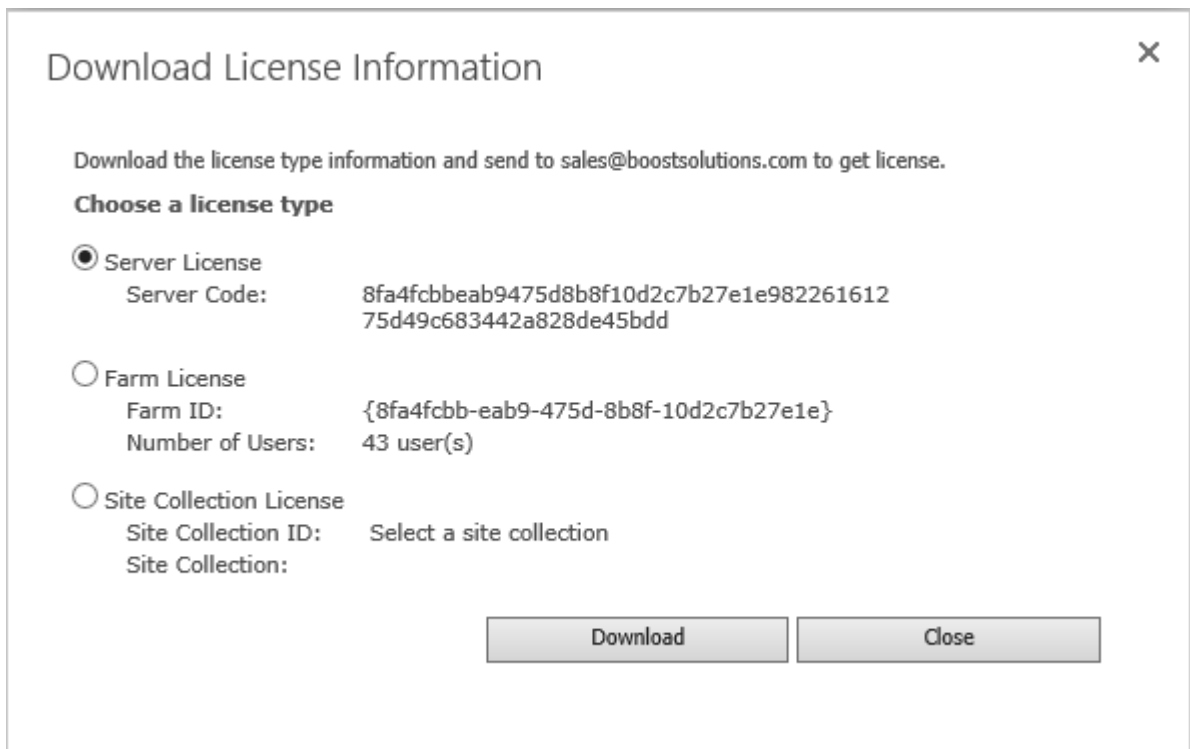
Appendix: License Management

You can use AD Self Service without entering any license code for a period of 30 days from when you first use it.

To use product after expiration, you will need to purchase a license and register the product.

Find License Information

- Navigate to the **BoostSolutions Software Management** section in Central Administration. Then, click **License Management Center** link.
- Click **Download License Information**, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).



Download License Information ✕

Download the license type information and send to sales@boostsolutions.com to get license.

Choose a license type

Server License
Server Code: 8fa4fcbbbeab9475d8b8f10d2c7b27e1e982261612
75d49c683442a828de45bdd

Farm License
Farm ID: {8fa4fcbb-eab9-475d-8b8f-10d2c7b27e1e}
Number of Users: 43 user(s)

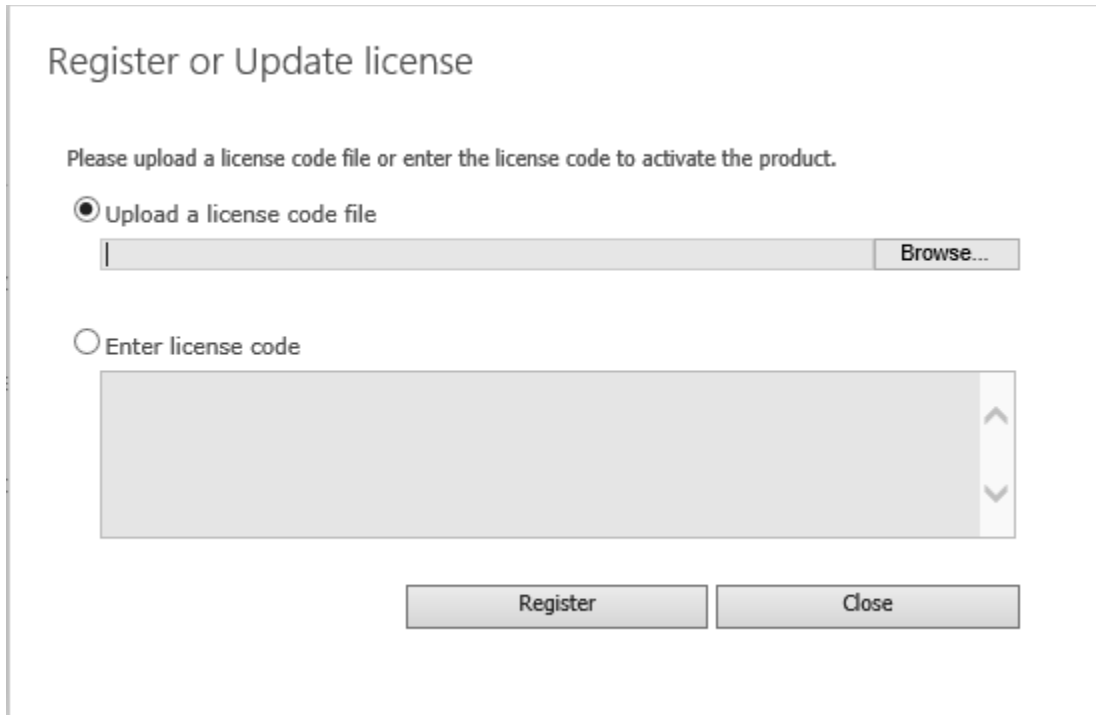
Site Collection License
Site Collection ID: Select a site collection
Site Collection:

In order for BoostSolutions to create a license for you, you need to send us your SharePoint environment identifier. Note that different license types need different information. A server license needs a server code; a Farm license needs a farm ID; and a site collection license needs a site collection ID.

- Send the above information to us (sales@boostsolutions.com) to generate a license code.

License Registration


- a. When you receive a product license code, enter the **License Management Center** page.
- b. Click **Register** on the license page and a **Register or Update license** window will open.



The screenshot shows a dialog box titled "Register or Update license". Inside the dialog, there is a prompt: "Please upload a license code file or enter the license code to activate the product." Below this prompt are two radio button options. The first option, "Upload a license code file", is selected. It is followed by a file input field with a "Browse..." button. The second option, "Enter license code", is unselected and is followed by a large text input field. At the bottom of the dialog, there are two buttons: "Register" and "Close".

- c. Upload the license file or enter the license code and click **Register**. You will get confirmation that your license has been verified successfully.

Register or Update license

 **Registered Successfully**

- ▶ The license was verified successfully.
- ▶ Thank you for choosing BoostSolutions.

If you encounter any problems or would like to suggest a product requirement, please contact support@boostsolutions.com

For more details on license management, see [BoostSolutions Foundation](#).