AD Administration 1.0

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 System Requirements .................................................................................................. 3
   2.3 Installation .................................................................................................................... 4
   2.4 Upgrade ......................................................................................................................... 5
   2.5 Uninstallation ............................................................................................................... 5
   2.6 Command Line Installation ........................................................................................... 5
   2.7 Feature Activation ........................................................................................................ 9
3. Add AD Administration Web Part ....................................................................................... 11
4. Configure AD Administration in Central Administration .................................................... 13
   4.1 Configure General Settings ......................................................................................... 13
      4.1.1 Configure Log Schedule ....................................................................................... 13
      4.1.2 View Logs ............................................................................................................. 14
      4.1.3 Configure SMTP Server Settings ........................................................................ 15
   4.2 Manage AD Administration User Permissions ............................................................. 15
      4.2.1 Assign Permissions to Users .................................................................................. 16
      4.2.2 Delete Users ......................................................................................................... 20
      4.2.3 Edit User Permissions ......................................................................................... 21
      4.2.4 View User Permissions ....................................................................................... 21
   4.3 Configure Web Part Layout and AD Properties Settings ................................................. 22
      4.3.1 Manage Tabs ....................................................................................................... 23
      4.3.2 Manage Properties .............................................................................................. 24
4.4 Configure AD Administration in Central Administration .................................................... 25
5. Get Familiar with the AD Administration Web Part ............................................................ 31
   5.1 Three Views of Users ................................................................................................... 32
      5.1.1 Organization .......................................................................................................... 32
      5.1.2 Alphabetical ......................................................................................................... 33
      5.1.3 Sites ..................................................................................................................... 34
   5.2 The Settings Menu ...................................................................................................... 34
      5.2.1 SMTP Server Settings .......................................................................................... 35
      5.2.2 Change Role ........................................................................................................ 35
      5.2.3 Appearance Settings ........................................................................................... 36
   5.3 The Actions Menu ....................................................................................................... 38
6. Manage AD with AD Administration Web Part

6.1 Manage OUs

6.1.1 Create an OU

6.1.2 Delete an OU

6.1.3 Rename an OU

6.1.4 Refresh an OU

6.1.5 Edit the AD Properties of an OU

6.2 Manage Groups

6.2.1 Create a Group

6.2.2 Delete a Group

6.2.3 Rename a Group

6.2.4 Edit the AD Properties of a Group

6.2.5 Add Users to or Remove Users from a Group

6.3 Manage Users

6.3.1 Create a User

6.3.2 Change Group for a User

6.3.3 Disable a User Account

6.3.4 Reset User Password

6.3.5 Delete a User

6.3.6 Rename a User

6.3.7 Edit the AD Properties of a User

6.4 Manage Computer

6.4.1 Change Group for a Computer

6.4.2 Disable a Computer

6.4.3 Delete a Computer

6.4.4 Edit the AD Properties of a Computer

6.5 Send Emails to Groups/Users

6.5.1 Send an Email to a Group

6.5.2 Send an Email to a User

7. Technical Limitations

8. Troubleshooting & Support

Appendix: License Management
1. Introduction

AD Administration (ADA) is a SharePoint Web Part that allows administrators to delegate user management permissions to specific users such as managers so that they can create, manage, and delete users and groups, reset users’ passwords, and edit AD profile information from within a predefined OU.

**Product Feature List**

- Grant specific users with the ability to manage AD object’s properties
- Enable authorized users to manage OUs, users, groups and computers directly in SharePoint
- Add users to SharePoint right after they are created
- Send email to users/groups directly from within AD Administration Web Part
- Restrict users from managing certain properties
- Define delegation scope and permission for each user
- Display users, groups and sites in Organization view, Alphabetical view and Sites view
- Record each operation in a log file

**About this User Guide**

This user guide is intended to instruct you on how to install/uninstall, configure and use SharePoint AD Administration. For the latest copy of this user guide and some other guides, please visit [http://www.boostsolutions.com/download-documentation.html](http://www.boostsolutions.com/download-documentation.html)
# 2. Installation

## 2.1 Product Files

After you download and unzip the AD Administration zip file from [www.boostsolutions.com](http://www.boostsolutions.com), you will find the following files:

<table>
<thead>
<tr>
<th>Path</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setup.exe</td>
<td>A program to install and deploy the WSP solution packages to the SharePoint farm</td>
</tr>
<tr>
<td>EULA.rtf</td>
<td>The product End-User-License-Agreement</td>
</tr>
<tr>
<td>AD Administration_V1_User Guide.pdf</td>
<td>User guide of AD Administration in PDF format.</td>
</tr>
<tr>
<td>Library\2.0\Setup.exe</td>
<td>The product installer for .Net Framework 2.0</td>
</tr>
<tr>
<td>Library\2.0\Setup.exe.config</td>
<td>A file that contains the configuration information for the installer</td>
</tr>
<tr>
<td>Library\4.0\Setup.exe</td>
<td>The product installer for .Net Framework 4.0.</td>
</tr>
<tr>
<td>Library\4.0\Setup.exe.config</td>
<td>A file that contains the configuration information for the installer.</td>
</tr>
<tr>
<td>Solutions\Foundation\BoostSolutions.FoundationSetup12.1.wsp</td>
<td>A SharePoint solution package that contains Foundation files and resources for SharePoint 2007 or WSS 3.0.</td>
</tr>
<tr>
<td>Solutions\Foundation\BoostSolutions.FoundationSetup14.1.wsp</td>
<td>A SharePoint solution package that contains Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.</td>
</tr>
<tr>
<td>Solutions\Foundation\BoostSolutions.FoundationSetup15.1.wsp</td>
<td>A SharePoint solution package that contains Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.</td>
</tr>
<tr>
<td>Solutions\ADAdministration\BoostSolutions.ADAdministrationSetup12.1.wsp</td>
<td>A SharePoint solution package that contains AD Administration files and resources for SharePoint 2007 or WSS 3.0.</td>
</tr>
<tr>
<td>Solutions\ ADAdministration\BoostSolutions.ADAdministrationSetup14.1.wsp</td>
<td>A SharePoint solution package that contains AD Administration files and resources for SharePoint 2010 or SharePoint Foundation 2010.</td>
</tr>
<tr>
<td>Solutions\ ADAdministration\BoostSolutions.ADAdministrationSetup15.1.wsp</td>
<td>A SharePoint solution package that contains AD Administration files and resources for SharePoint 2013 or SharePoint Foundation 2013.</td>
</tr>
<tr>
<td>Solutions\ ADAdministration\Install.config</td>
<td>A file containing the configuration information for</td>
</tr>
</tbody>
</table>
the installer.

2.2 System Requirements

Before you install AD Administration, make sure that your system meets the following requirements:

**SharePoint 2013**

| Operating System | Microsoft Windows Server 2012 Standard or Datacenter X64  
<table>
<thead>
<tr>
<th></th>
<th>Microsoft Windows Server 2008 R2 SP1</th>
</tr>
</thead>
</table>
| Server           | Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013  
|                  | Microsoft .NET Framework 4.5 |
| Browser          | Microsoft Internet Explorer 8/9/10  
|                  | Mozilla Firefox  
|                  | Google Chrome |

**SharePoint 2010**

| Operating System | Microsoft Windows Server 2008 x64  
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Microsoft Windows Server 2008 R2</td>
</tr>
</tbody>
</table>
| 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 and above  
|                  | Mozilla Firefox  
|                  | Google Chrome |

**SharePoint 2007**

| Operating System | Microsoft Windows Server 2003 x86/x64  
|------------------|-------------------------------------|
|                  | Microsoft Windows Server 2008 x86/x64  
|                  | Microsoft Windows Server 2008 R2 |
| Server           | Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007 SP2  
|                  | Microsoft .NET Framework 2.0 and above  
|                  | **Note** This product is not compatible with SPS 2003 and WSS v2. |
| Browser          | Microsoft Internet Explorer 6 and above |
2.3 Installation

Follow the steps below to install ADA on your SharePoint servers.

**Installation Preconditions**

Before you install ADA, please make sure the following services are started on your SharePoint servers:
*SharePoint Administration and SharePoint Timer.*

AD Administration 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 ADA on SharePoint Server**

a. Download the zip file (*.zip) of AD Administration from the BoostSolutions website, then extract the file.

b. 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 ADA. 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. If you want to manually activate the product feature later, clear this check box.

f. Upon completion of the installation, details are displayed showing the web applications where ADA has been installed. Click Close.

2.4 Upgrade

Download the latest version of AD Administration and run the Setup.exe file.

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

2.5 Uninstallation

If you want to uninstall AD Administration, 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 Administration in SharePoint 2010 by using the SharePoint STSADM command line tool.

Required Permissions

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

Install AD Administration to SharePoint Servers
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 2010**
     
     C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\BIN
   - **SharePoint 2013**
     
     C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\BIN
   - **SharePoint 2007**
     
     C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\BIN\stsadm.exe

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

   ```
   stsadm -o addsolution -filename BoostSolutions.ADAdministrationSetup14.1.wsp
   stsadm -o addsolution -filename BoostSolutions.FoundationSetup14.1.wsp
   ```

d. Deploy the added solution with the following command:

   ```
   stsadm -o deploysolution -name BoostSolutions.ADAdministrationSetup14.1.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.ADAdministrationSetup14.1.wsp
   stsadm -o displaysolution -name BoostSolutions.FoundationSetup14.1.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 SharePointBoost.ADAdministration –url [site collection url] –force
   ```

**Note:**

After install product using command line, you can check whether the product is installed and
deployed successfully in Central Administration.

a. On the Central Administration Home page, click **System Settings**.

b. In the Farm Management section, click **Manage farm solutions**.

c. On the Solution Management page, check whether the solution “boostsolutions.adadministrationsetup14.1.wsp” is deployed to the web applications.

d. On the Solution Properties page, click **Deploy Solution**.

e. On the Deploy Solution page, in the Deploy When section, select **Now**.

f. In the Deploy To? section, in the A specific web application list, click either All web applications or select a specific Web application.

g. Click **OK**.

---

**Remove AD Administration from SharePoint Server**

a. Removal is initiated with the following command:

```plaintext
stsadm -o retractsolution -name BoostSolutions.ADAdministrationSetup14.1.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:

```plaintext
stsadm -o displaysolution -name BoostSolutions.ADAdministrationSetup14.1.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:

```plaintext
stsadm -o deletesolution -name BoostSolutions.ADAdministrationSetup14.1.wsp
```

---

**Note:**

After uninstall product using command line, you can check whether the product is removed and successfully in Central Administration.

a. On the Central Administration Home page, click **System Settings**.

b. In the Farm Management section, click **Manage farm solutions**.
To 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:

```
stadm -o retractsolution -name BoostSolutions.FoundationSetup14.1.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:

```
stadm -o displaysolution -name BoostSolutions.FoundationSetup14.1.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:

```
stadm -o deletesolution -name BoostSolutions.FoundationSetup14.1.wsp
```

**Note:**

After uninstall product using command line, you can check whether the product is removed and successfully in Central Administration.

d. On the Solution Management page, click “boostsolutions.adadministrationsetup14.1.wsp”.

e. On the Solution Properties page, click **Retract Solution**.

f. In the Retract From section, in the A specific web application list, click All content web applications.

g. Click **OK**.

h. Wait a minute, and refresh the browser until you see “Not Deployed” as the status for boostsolutions.adadministrationsetup14.1.wsp.

i. Select “boostsolutions.adadministrationsetup14.1.wsp”.

j. On the Solution Properties page, click **Remove Solution**.
l. In the Farm Management section, click Manage farm solutions.

m. On the Solution Management page, click “boostsolutions.foundationsetup14.1.wsp”.

n. On the Solution Properties page, click Retract Solution.

o. On the Retract Solution page, in the Deploy When section, select Now.

p. In the Retract From section, in the A specific web application list, click All content web applications.

q. Click OK.

r. Wait a minute, and refresh the browser until you see “Not Deployed” as the status for boostsolutions.foundationsetup14.1.wsp.

s. Select “boostsolutions.foundationsetup14.1.wspps”.

t. On the Solution Properties page, click Remove Solution.

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 the feature is activated, the Status column lists the feature as 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.
**AD Administration 1.13.104.0**

Allows administrators to delegate user management capabilities to specific users so they can create, manage, and delete users and groups, reset other users’ passwords, and edit AD profile information from within a predefined OU.

(Powered by BoostSolutions)
3. Add AD Administration Web Part

You can add the AD Administration Web Part to any SharePoint site in your site collection.

a. Go to the page where you would like to add ADA Web Part. Click Edit Page on the Site Actions menu. On the ribbon, click Insert under the Editing Tools tab, and then click Web Part.

   ![Site Actions and Editing Tools](image)

b. In the Categories section, click BoostSolutions Web Parts, select BoostSolutions AD Administration from the Web Part list, and then click Add.

   ![Categories and Web Parts](image)

   **Note** You must have customized pages permission to the current site to add and edit the Web Part.

Then AD Administration Web Part will be added to the page. You need to configure the general settings of AD Administration in Central Administration and assign permission for users to use this Web Part (See 4. Configure ADA in Central Administration for details.). If you did not add user permissions in Central Administration, then the Web Part would be displayed as below:
**Note** The Web Part will only display to users with the right permissions. Go to Central Administration and add AD Administration Web Part user permissions.
4. Configure AD Administration in Central Administration

On the Central Administration homepage, click BoostSolutions Software. Under AD Administration, you will find General Settings, AD Administration User Permissions, View User Permissions and License Management.

<table>
<thead>
<tr>
<th>Central Administration</th>
<th>BoostSolutions Software</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Management</td>
<td></td>
</tr>
<tr>
<td>System Settings</td>
<td></td>
</tr>
<tr>
<td>Monitoring</td>
<td></td>
</tr>
<tr>
<td>Backup and Restore</td>
<td></td>
</tr>
<tr>
<td>Security</td>
<td></td>
</tr>
<tr>
<td>Upgrade and Migration</td>
<td></td>
</tr>
<tr>
<td>General Application Settings</td>
<td></td>
</tr>
<tr>
<td>Configuration Wizards</td>
<td></td>
</tr>
</tbody>
</table>

4.1 Configure General Settings

Click General Settings to enter the General Settings page.

The General Settings of AD Administration allows administrator to configure log and SMTP Server settings.

4.1.1 Configure Log Schedule

The log schedule section provides you the options to specify how often a new log file should be generated or specify the number of days after which to delete the log files from the server. Select the Enable Log check box.
Monthly: create a log once every month.

Number of day(s) to use a log file: create a log after a number of days specified by the administrator.

Delete logs from the server after x day(s): delete the log files from the server after a specified number of days.

4.1.2 View Logs

Click View Logs, in the open window you can view all changes made with AD Administration Web Part.

You can filter these results based on time range.

From 12 AM 00 To 12 AM 00

You can also filter these results based on the Action performed with the AD Administration Web Part.

<table>
<thead>
<tr>
<th>Action</th>
<th>Modified by</th>
<th>Log Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change e-mail settings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create OU</td>
<td>CRYSTAL\susan</td>
<td></td>
</tr>
<tr>
<td>Rename OU</td>
<td>CRYSTAL\susan</td>
<td></td>
</tr>
<tr>
<td>Edit OU</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delete OU</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create AD group</td>
<td>SHAREPOINT\system</td>
<td>Details</td>
</tr>
<tr>
<td>Rename AD group</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit AD group</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delete AD group</td>
<td>SHAREPOINT\system</td>
<td></td>
</tr>
<tr>
<td>Add AD user to AD group</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remove AD user from AD group</td>
<td>SHAREPOINT\system</td>
<td></td>
</tr>
<tr>
<td>Create AD user</td>
<td>SHAREPOINT\system</td>
<td></td>
</tr>
<tr>
<td>Enable AD user account</td>
<td>SHAREPOINT\system</td>
<td></td>
</tr>
<tr>
<td>Disable AD user account</td>
<td>SHAREPOINT\system</td>
<td></td>
</tr>
<tr>
<td>Add AD user</td>
<td>SHAREPOINT\system</td>
<td></td>
</tr>
<tr>
<td>Rename AD user</td>
<td>SHAREPOINT\system</td>
<td></td>
</tr>
<tr>
<td>Edit AD user</td>
<td>SHAREPOINT\system</td>
<td></td>
</tr>
<tr>
<td>Reset user password</td>
<td>SHAREPOINT\system</td>
<td></td>
</tr>
<tr>
<td>Unknown</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To display log details, click Details in the Log Details column. Then details such as Changed Property, Old Value and New Value will be displayed in a window.
4.1.3 Configure SMTP Server Settings

The SMTP Server Settings section allows you to customize the SMTP settings for the AD Administration Web Part.

SMTP domain name/IP address, port, from display name, from address and reply-to address can be customized. You can also use either the default Windows login credentials or that of another user. The settings also enable SSL connection.

- **Note** There is no need to customize these settings if the SMTP server settings are already configured in the SharePoint Central Administration.

4.2 Manage AD Administration User Permissions

Click AD Administration User Permissions to enter the User Permissions for AD Administration page.
You can find another entry for **AD Administration User Permissions** directly under **BoostSolutions Software**.

### 4.2.1 Assign Permissions to Users

Click **Add Users** to enter the **Add Users** page.

There are no items to show in this view.

**Specify Users**

In the **Users** section, type user/group names, or their email addresses. You can click the icon to find users and groups. Click the people picker icon to verify names.

**Specify OUs**

In **Organizational Units** section, specify which Organizational Units (OUs) the users/groups can manage using the AD Administration Web Part. To do this, you need to specify the **Domain name** and the administrator’s credentials.

**Note** By default, Domain name and Username are filled automatically, so you just need to type the password of administrator.
a. Enter the password of the administrator.

```
Domain name: crystal.local
Username: administrator
Password: **********
```

b. Click **Load** to load the OU tree based on the login credentials.

```
Domain name: crystal.local
Username: administrator
Password: **********
```

![OU tree](image)

c. Specify the OUs that the users/groups can manage using the AD Administration Web Part.
Specify Permissions

In Permissions section, specify which permissions you would like to delegate to the selected users/groups. Select the check boxes according to your needs.
Specify Properties

In the Properties section, specify which user properties can be edited using AD Administration Web Part. By default, AD Administration provides four tabs (General, Address, Telephones and Organization) that include almost all common AD properties.
You can manage the tabs and properties, see 4.3 Configure Web Part Layout and AD Properties Settings for details.

Scroll to the bottom of this page and click **Save** to have the users added to AD Administration.

After you have added some users, their details will be displayed on the **User Permissions for AD Administration** page with **Display Name**, **User Name**, **Type**, and **Permissions**.

### 4.2.2 Delete Users

Select the user you want you delete. Then click **Delete Selected Users** or the delete icon (×) to delete the user.
4.2.3 Edit User Permissions

Select the user you want you edit. Then click **Edit Permissions of Selected Users** or the edit icon to enter the **Edit User** page.

On the **Edit User** page, edit the permissions of the user and click **Save** to save your modification.

You can also click on either the display name or the user name of a user to access the **Edit User** page.

4.2.4 View User Permissions

You can view permissions that you assigned for users. Click **View User Permissions**.

Then you will be directed to the **View User Permissions** page. All users in a group will be displayed. Users will be displayed with **Display name**, **User name**, **Type**, **Permissions inherited from**, and the **Permissions** themselves.
4.3 Configure Web Part Layout and AD Properties Settings

By default, AD Administration provides four tabs, including default AD properties. You can configure the Web Part layout AD properties settings on the Add Users page.

<table>
<thead>
<tr>
<th>Display Name</th>
<th>User Name</th>
<th>Type</th>
<th>Permissions inherited from</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>CRYSTAL\Administrator</td>
<td>SecurityGroup</td>
<td>CRYSTAL\domain admins</td>
<td>Manage OU, Delete OU, Manage Group, Delete Group, Manage User, Delete User, Reset User Password</td>
</tr>
<tr>
<td>Susan Zhang</td>
<td>CRYSTAL\susan</td>
<td>User</td>
<td></td>
<td>Manage Group, Delete Group, Manage User, Delete User, Reset User Password</td>
</tr>
<tr>
<td>Tom Brown</td>
<td>CRYSTAL\Tom Brown</td>
<td>SecurityGroup</td>
<td>CRYSTAL\domain admins</td>
<td>Manage OU, Delete OU, Manage Group, Delete Group, Manage User, Delete User, Reset User Password</td>
</tr>
</tbody>
</table>
4.3.1 Manage Tabs

ADA provides four tabs (General, Address, Telephones and Organization) by default that includes almost all common AD properties.

Add a Tab

a. Click **New Tab** or the add icon before it to add a tab.

b. In the text box of the tab, type a name for the tab.

c. Press the Enter key or click elsewhere of the tab to confirm.

Edit a Tab

To edit a tab, click the edit icon on the right side of the tab. Then you can change the name of the tab in its text box.
Delete a Tab

To delete a tab, click the delete icon next to the edit icon of the tab.

A message appears asking if you are confirmed with the deletion. Click OK if you are confirmed.

Change the Positions of Tabs

You can drag and drop the tabs to adjust the positions of tabs.

4.3.2 Manage Properties

Add a Property

a. Click the icon before the tab name or double click on the tab to expand the tab where you want to add a property.

b. At the bottom of the all properties displayed, click Add New Property.
c. In the open window, type a name and a display name for the property. Then set the display style for this property. Click **Add**.

**Note** Property name should be one that exists in AD. If the property name you entered does not exist in AD, a warning message will appear “This property name does not exist in AD.”
The **Display Style** allows you to specify how users can enter their AD property information, typing texts in the text box, or selecting values from the drop-down list or lookup column.

- **Text box**: allows user to edit a property in its text box. You can specify the number of rows for the text box of this property.

![Add New Property](image)

- **Drop down list**: set customized predefined values into a drop-down list for users to choose.

  To set list values, click **Set**.

![Set List Values](image)

  To add a value, type a value in **New Value** text box, and then click **Add**.

  To remove a value, select the value, and then click **Remove**.

  To edit a value, select the value, and then click **Edit**. Then you can change the value.
Text (Read-only): display the property as read-only status on the Web Part, so that users cannot edit this property.

Edit a Property

a. Click the edit icon on the right side of the property or double click on the property to display the property details.
b. In the **Appearance** section, modify the display name or display style and click **Save**.

There are many AD properties with multiple entries, including Telephone number, Web page, Home Phone, Pager, Mobile Phone, Fax and IP phone. You can deselect the **Allow multiple entries** check box or change the display name for additional entry.
**Delete a Property**

To delete a tab, click the delete icon next to the edit icon of the property.
A message appears asking if you are confirmed with the deletion. Click **OK** if you are confirmed.

**Adjust the Positions of Properties**

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

<table>
<thead>
<tr>
<th>Property</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
</tr>
<tr>
<td>First name:</td>
</tr>
<tr>
<td>Last name:</td>
</tr>
<tr>
<td>Initials:</td>
</tr>
<tr>
<td>Display name:</td>
</tr>
<tr>
<td>Description:</td>
</tr>
<tr>
<td>Office:</td>
</tr>
<tr>
<td>Telephone number:</td>
</tr>
<tr>
<td>E-mail:</td>
</tr>
<tr>
<td>Web page:</td>
</tr>
</tbody>
</table>

[Add New Property]
5. Get Familiar with the AD Administration Web Part

According to the configurations for AD Administration Web Part users in Central Administration (CA), the Web Part will display the OUs, tabs and properties as configured.

For **David**, all the OUs were selected for him in Central Administration. When he logs on to the site where the Web Part is added, the Web Part will display all the OUs. The display order of tabs is adjusted as configured (The Organization tab is right after the General tab). The user properties are also displayed as preciously configured. He can manage AD with the OUs, groups and users via the Web Part according to the permissions set up for him in CA.

![User properties example](image)

For **Susan**, only three OUs were select for her in Central Administration. When she logs on to the site where the Web Part is added, the Web Part will only display the three OUs. The display order of tabs remains unchanged as it was not adjusted in Central Administration. The user properties are also displayed as preciously configured. She can manage AD with the OUs, groups and users via the Web Part according to the permissions set up for her in Central Administration.
5.1 Three Views of Users

AD Administration offers three different views to display the structure and users in it, namely, **Organization**, **Alphabetical** and **Sites**.

5.1.1 Organization

The Organization view is the default view for AD Administration Web Part. In this view, information is displayed according to the OU structure in Active Directory. You can see the OUs as well as the groups and users.
### 5.1.2 Alphabetical

The Alphabetical view displays all users alphabetically by the first letter of their last names. The number in brackets after the letter indicates the number of users whose last name begins with the letter.

<table>
<thead>
<tr>
<th>Alphabetical</th>
</tr>
</thead>
<tbody>
<tr>
<td>B(2)</td>
</tr>
<tr>
<td>Tom Brown</td>
</tr>
<tr>
<td>Johnson Bush</td>
</tr>
<tr>
<td>C(1)</td>
</tr>
<tr>
<td>G(1)</td>
</tr>
<tr>
<td>L(1)</td>
</tr>
<tr>
<td>S(2)</td>
</tr>
<tr>
<td>W(5)</td>
</tr>
<tr>
<td>Z(4)</td>
</tr>
</tbody>
</table>

If a SharePoint environment contains many users, the Alphabetical view will display users summarized in object sets. This can be configured in the **Appearance Settings** of the Web Part, see **5.2.3 Appearance Settings** for details.

**Note** This functionality is not fully supportable for Asian languages.
5.1.3 Sites

The Sites view displays the users and groups according to their permissions to the sites in the SharePoint environment.

![Sites View]

5.2 The Settings Menu

The ADA Web Part Settings Menu allows users to change the settings include SMTP Sever Settings, License Management, Change Role and Appearance Settings.

![Settings Menu]

**Note** The user must have Customize Pages permission to the site. Otherwise, the Setting menu is not available. If the user only has one role, the Change Role (see 5.2.2 Change Role for details.) setting is not available.
### 5.2.1 SMTP Server Settings

Here users can customize SMTP server settings that are different from those configured for AD Administration Settings in Central Administration.

<table>
<thead>
<tr>
<th>SMTP Server Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMTP domain name or IP address:</td>
</tr>
<tr>
<td>Port:</td>
</tr>
<tr>
<td>From display name (this will be displayed in the From field of each email):</td>
</tr>
<tr>
<td>From address (this will be set as the default From address for each email):</td>
</tr>
<tr>
<td>Reply-to address (this will be set as the default reply-to address for each email):</td>
</tr>
<tr>
<td>Use default Windows user login credentials</td>
</tr>
<tr>
<td>Use custom user login credentials</td>
</tr>
<tr>
<td>Username:</td>
</tr>
<tr>
<td>Password:</td>
</tr>
<tr>
<td>Enable SSL connection</td>
</tr>
</tbody>
</table>

Send Test Email

The configuration here is the same as that for AD Administration **General Settings** in Central Administration.

### 5.2.2 Change Role

If a user has different permissions to two or more OUs, the user can specify which role he/she wants to use. Multiple roles are available because this user might be part of one or several groups for which permissions to AD Administration Web Part are delegated.

Take Susan for example. Susan is the manager of Human Resource department. She is also member of the View Data group.
### 5.2.3 Appearance Settings

The **Appearance Settings** allows users to specify how many users should be displayed in one set of objects in the **Alphabetical** view. This makes the view ease to manage and reduces the loading time to pull information from AD into the Web Part; and this is especially useful if you need to manage a large number of users with their last names beginning with the same letter.
For example, specify the number of objects as 3, refresh the page and click **Alphabetical**. Users whose last names begin with the same letter **W** is displayed as below. The "1-3" or "4-5" set can be expanded or collapsed as required. To display more objects, click **Display more objects**.

<table>
<thead>
<tr>
<th>W(3+)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-3</td>
</tr>
<tr>
<td>Administrator</td>
</tr>
<tr>
<td>Gairy Wu</td>
</tr>
<tr>
<td>Cindy Wang</td>
</tr>
<tr>
<td>4-5</td>
</tr>
<tr>
<td>Daniel Wang</td>
</tr>
<tr>
<td>Michale Wang</td>
</tr>
<tr>
<td>Display more objects...</td>
</tr>
</tbody>
</table>

**Note** For an optimal performance, it is recommended that each set contains no more than 1,000 objects.
5.3 The Actions Menu

The **Actions** menu contains several commands that help you manage OUs, groups and users, and send emails.

Select one OU and then click **Actions**. The menu displays as:

```
<table>
<thead>
<tr>
<th>Actions</th>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create OU</td>
<td></td>
</tr>
<tr>
<td>Create Group</td>
<td></td>
</tr>
<tr>
<td>Create User</td>
<td></td>
</tr>
<tr>
<td>Delete</td>
<td></td>
</tr>
<tr>
<td>Rename</td>
<td></td>
</tr>
<tr>
<td>Refresh</td>
<td></td>
</tr>
<tr>
<td>Properties</td>
<td></td>
</tr>
</tbody>
</table>
```

Select one group and then click **Actions**. The menu displays as:

```
<table>
<thead>
<tr>
<th>Actions</th>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Mail</td>
<td></td>
</tr>
<tr>
<td>Delete</td>
<td></td>
</tr>
<tr>
<td>Rename</td>
<td></td>
</tr>
<tr>
<td>Properties</td>
<td></td>
</tr>
</tbody>
</table>
```

Select a user and then click **Actions**. The menu displays as:

```
<table>
<thead>
<tr>
<th>Actions</th>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Group</td>
<td></td>
</tr>
<tr>
<td>Disable Account</td>
<td></td>
</tr>
<tr>
<td>Reset Password</td>
<td></td>
</tr>
<tr>
<td>Send Mail</td>
<td></td>
</tr>
<tr>
<td>Delete</td>
<td></td>
</tr>
<tr>
<td>Rename</td>
<td></td>
</tr>
<tr>
<td>Properties</td>
<td></td>
</tr>
</tbody>
</table>
```
6. Manage AD with AD Administration Web Part

According to the permissions assign to users, they can manage AD with its OUs, groups and users, and even send emails directly in AD Administration Web Part.

6.1 Manage OUs

6.1.1 Create an OU

a. Select the OU in which you want to create an OU and click Create OU on the Actions menu. (Or right-click on the OU, and then click Create OU.)

b. Enter relevant OU information on the right side of the Web Part. Click Save.

c. A message will ask you if you are confirmed to save OU information to AD. Click OK.
6.1.2 Delete an OU

a. Select the OU you want to delete and click **Delete** on **Actions** menu. (Or right-click on the OU and click **Delete**.)

b. A message will ask you if you are confirmed with this deletion. Click **OK**.

6.1.3 Rename an OU

a. Select the OU you want to rename and click **Rename** on the **Actions** menu. (Or right-click on the OU and click **Rename**.)

b. Type a new name for the OU and click elsewhere of the editing field.

6.1.4 Refresh an OU

Select the OU you want to refresh and click **Refresh** on the **Actions** menu. (Or Right-click on the OU, and then click **Refresh**.) This will refresh the OU and expand it if it was collapsed before.
6.1.5 Edit the AD Properties of an OU

a. Select the OU for which you want to edit the properties and click **Properties** on the **Actions** menu. (Or right-click on the OU and click **Properties**. Or just click on the OU.)

b. On the right side of the Web Part, edit its properties.

c. Click **Save**. A message will ask you if you are confirmed to save OU information to AD.

d. Click **OK**. Then the changes will be saved successfully.

6.2 Manage Groups

6.2.1 Create a Group

a. Select the OU in which you want to create a group and then click **Create Group** on the **Actions** menu. (Or right-click on the OU and click **Create Group**.)

b. Type the relevant information for the group on the right side of the Web Part.
Type the group name and the pre-Windows 2000 group name will be added automatically. It ensures compatibility with pre-Windows 2000 system environment.

c. After all information is entered, click **Save**. A message will ask you if you are confirmed to save the group information to AD. Click **OK**.

### 6.2.2 Delete a Group

a. Select the group you want to delete and click **Delete** on the **Actions** menu. (Or right-click the group and then click **Delete**.)

b. A message will ask if you are sure to remove this group. Click **OK** and then this group will be removed.

### 6.2.3 Rename a Group

a. Select the group that you want to rename and click **Rename** on the **Actions** menu. (Or right-click on the group and then click **Rename**.)

b. Type a new name or change the name for the group, and then click elsewhere of the editing filed.
6.2.4 Edit the AD Properties of a Group

a. Select the group for which you want to edit the properties and click Properties on the Actions menu. (Or right-click on a group and click Properties. Or just click on the group.)

b. On the right side of the Web Part, edit the properties of the group under the Group tab.

Meanwhile, you can add members to this group or remove members from this group under the Members tab, see 6.2.5 Add Users to or Remove Users from a Group for details.

6.2.5 Add Users to or Remove Users from a Group

Add Users to a Group

a. Under the Members tab of a group, click Add.

<table>
<thead>
<tr>
<th>Group</th>
<th>Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Active Directory Folder</td>
</tr>
</tbody>
</table>

b. Type the name of the users/groups that you want to add, and click the people picker to verify or look up a user/group from the directory. Click OK.
c. Click **Save** and then the user is added a member of the group.

**Remove Users from a Group**

a. To remove the member you added, select the user and then click **Remove**.

<table>
<thead>
<tr>
<th>Name</th>
<th>Active Directory Folder</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brant Song</td>
<td>crystal.local/Sales/aftersales</td>
<td>user</td>
</tr>
<tr>
<td>Sueen Zhang</td>
<td>crystal.local/HR</td>
<td>user</td>
</tr>
</tbody>
</table>

b. A message will ask if you are confirmed to remove the user from this group. Click **OK** and then it will be removed.

### 6.3 Manage Users

#### 6.3.1 Create a User

a. Select the OU in which you want to create a user and click **Create User** on the **Actions** menu. (Or right-click on any OU and click **Create User**.)
b. On the right side of the Web Part, enter the user information, and then click **Next**.

```
<table>
<thead>
<tr>
<th>Create in:</th>
<th>crystal.local/Marketing</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name: Lena</td>
<td>Initials:</td>
</tr>
<tr>
<td>Last name: Zhao</td>
<td></td>
</tr>
<tr>
<td>Full name: Lena Zhao</td>
<td></td>
</tr>
<tr>
<td>User logon name: lena.zaho @crystal.local</td>
<td></td>
</tr>
<tr>
<td>User logon name (pre-Windows 2000):</td>
<td>lena</td>
</tr>
</tbody>
</table>
```

<Next>  <Cancel>

c. Set the password for this user and then click **Next**.

```
<table>
<thead>
<tr>
<th>Create in:</th>
<th>crystal.local/Marketing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password:</td>
<td>******</td>
</tr>
<tr>
<td>Confirm password:</td>
<td>******</td>
</tr>
<tr>
<td>User must change password at next logon</td>
<td>✔</td>
</tr>
<tr>
<td>User cannot change password</td>
<td></td>
</tr>
<tr>
<td>Password never expires</td>
<td></td>
</tr>
<tr>
<td>Account is disabled</td>
<td></td>
</tr>
</tbody>
</table>
```

<Back>  <Next>  <Cancel>

d. Select the group to which you want to add this user. This is optional. Click **Finish**.
At this stage, this user has only been added to AD, he/she has not yet been added to SharePoint. If you only want to create this user in AD, click **Finish**.

**Add this User to SharePoint**

a. Click the link **Click here to add this user to SharePoint**.
Then you will be directed to the **Grant Permissions** page.

b. In the **Select Users** section, enter the user name or look the user up in via the directory.

![Select Users](image)

<table>
<thead>
<tr>
<th>Select Users</th>
<th>Users/Groups:</th>
</tr>
</thead>
<tbody>
<tr>
<td>You can enter user names, group names, or e-mail addresses. Separate them with semicolons.</td>
<td>Lena Zhao ;</td>
</tr>
</tbody>
</table>

c. In the **Grant Permissions** section, select the permissions for this user.

![Grant Permissions](image)

<table>
<thead>
<tr>
<th>Grant Permissions</th>
<th>Grant Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the permissions you want these users to have. You can add users to a SharePoint group that has already been granted the appropriate permission levels, or you can grant the users specific permission levels.</td>
<td>Add users to a SharePoint group (recommended)</td>
</tr>
<tr>
<td>Adding users to a SharePoint group is recommended, as this makes managing permissions easier across multiple sites.</td>
<td><strong>Home Members [Contribute]</strong> □</td>
</tr>
</tbody>
</table>
| View permissions this group has on sites, lists, and items... | Grant users permission directly
| This site is using the same permissions as its parent site. To manage permissions directly for this site, navigate to the Site Permissions page and click Stop Inheriting on the status bar. |
d. In the **Send E-mail** section, you can choose to send a custom welcome email to this user.

<table>
<thead>
<tr>
<th>Send E-Mail</th>
</tr>
</thead>
</table>
| Use this option to send e-mail to your new users. You can personalize the message that is sent. Links and information about the site will be added below your personal message. | Set to default fields or input custom values for:
- **Send welcome e-mail to the new users**
- **Subject:** Welcome to the SharePoint group: Home Members for site: AD Admin
- **Personal Message:**


e. After all is done, click **OK**.

**Edit the Properties of this User**

a. Click the link **Click here to edit user properties**.

The following user has been created in crystal.local/Marketing:

- **Full name:** Lena Zhao
- **User logon name:** lena.zhao
- **User must change password at next logon**
- **User in group(s):**
  - crystal.local/Users/Manager

**Click here to add this user to SharePoint.**

**Click here to edit user properties.**

**Note:** Clicking “Finish” will create the user in AD, but will not necessarily add the user to SharePoint. If you would like to add the user to SharePoint, please click the link above. If you only want to create the user in AD, click “Finish” to complete creation of the account in AD only.
b. On the right side of the Web Part edit the properties of this user. See 6.3.7 Edit AD Properties of a User for details.

6.3.2 Change Group for a User

a. Select the user for whom you want to change group and click Change Group on the Actions menu. (Or Right-click on the user and then click Change Group.)

b. Clear the check box before a group name to remove this user from the group. Then add this user to another group(s) by clicking relevant check box(es). Click OK to confirm.

6.3.3 Disable a User Account

a. Select a user for which you want to disable the account and click Disable Account on the Actions menu. (Or right-click the user and then click Disable Account.)

b. A message will ask if you are confirmed to disable this user account. Click OK. Then the user account is disabled. The user icon 🧑‍💻 will turn to 💼.
The procedure is similar if you want to enable a user. The **Disable Account** command will change to **Enable Account**. After the user account is enabled, the user icon 🔄 will turn back to 🚶.

### 6.3.4 Reset User Password

a. Select the user for whom you want to reset the password and then click **Reset Password** on the **Actions** menu. (Or right-click on the user and click **Reset Password**.)

b. On the right side of the Web Part, reset the user password following the password policy. Then click **Reset**.

![Reset password for user: Lena Zhao](image)
6.3.5 Delete a User

a. Select the user you want to delete and then click **Delete** on the **Actions** menu. (Or right-click on the user and then click **Delete**.)

b. A message will ask if you are confirmed with the deletion. Click **OK**. Then the user will be removed.

6.3.6 Rename a User

a. Select the user you want to rename and then click **Rename** on the **Actions** menu. (Or right-click on the user and click **Rename**.)

b. The user name now becomes editable. Type a new name or change the name for the user, and then click elsewhere of the editing field.

6.3.7 Edit the AD Properties of a User

a. Select the user for which you want to edit its properties and then click **Properties** on the **Actions** menu. (Or right-click on the user and click **Properties**. Or just click on the user.)

b. On the right side of the Web Part, change the AD properties of the user and then click **Save**.

c. A message will ask if you are confirmed to save user information to AD. Click **OK**.

6.4 Manage Computer

AD Administration enables you to manage computers in SharePoint, you can do these operation: edit properties, change group, enable/disable or delete computer.

6.4.1 Change Group for a Computer

a. Select the computer that you want to change group and click **Change Group** on the **Actions** menu. (Or Right-click on the computer and then click **Change Group**.)

b. Clear the check box before a group name to remove this computer from the group. Then add this computer to another group(s) by clicking relevant check box(es). Click **OK** to confirm.

6.4.2 Disable a Computer

a. Select a computer that you want to disable and click **Disable Account** on the **Actions** menu. (Or right-click the computer and then click **Disable Account**.)
b. A message will ask if you are confirmed to disable this computer account. Click OK. Then the computer account is disabled. The computer icon 🍃 will turn to 🍃.

The procedure is similar if you want to enable a computer. The Disable Account command will change to Enable Account. After the computer account is enabled, the computer icon 🍃 will turn back to 🍃.

### 6.4.3 Delete a Computer

a. Select the computer you want to delete and then click Delete on the Actions menu. (Or right-click on the computer and then click Delete.)

b. A message will ask if you are confirmed with the deletion. Click OK. Then the computer will be removed.

### 6.4.4 Edit the AD Properties of a Computer

a. Select the computer for which you want to edit its properties and then click Properties on the Actions menu. (Or right-click on the computer and click Properties. Or just click on the computer.)

b. On the right side of the Web Part, change the AD properties of the computer and then click Save.

As with Active Directory, you can only edit the editable property of AD, such as Description property.

c. A message will ask if you are confirmed to save computer information to AD. Click OK.

### 6.5 Send Emails to Groups/Users

You can send emails to groups or users directly in SharePoint via the Web Part.

#### 6.5.1 Send an Email to a Group

a. Select the group to which you want to send an email and then click Send Mail on the Actions menu. (Or right-click on the group and click Send Mail.)

b. On the right side of the Web Part, enter the email address of a member of this group or select the Send to all members of this group check box if you want to send the email to all members of the group. Then enter the subject and content of the email. You can choose to write in plain text or use the Rich Text Format.

c. Click Send. A window will show the progress. Then the addresses you send to will be displayed.
6.5.2 Send an Email to a User

a. Select the user to which you want to send an email and then click **Send Mail** on the **Actions** menu. (Or right-click on the user and click **Send Mail**.)

b. On the right side of the Web Part, enter the subject and content of this email. You can choose to write in plain text or use the Rich Text Format.

c. Click **Send**. A window will show the progress. Then the address(es) you send to will be displayed.
7. Technical Limitations

There are the following limitations of AD Administration:

- The proxy account only supports domain administrators.
8. 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:
Appendix: License Management

You can use a product without entering any license code for a trial of 30 days. To remove the limitation, you need to purchase a license to register the product.

Find License Information

a. Navigate to the BoostSolutions Software Management section in Central Administration. Then, click License Management Center link.

b. Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).

c. 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.

![Register or Update license](image)

- **CVS Repository**

  > **CVS Repository**
  
  - 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 information about license management, see [BoostSolutions Foundation](https://www.boostsolutions.com) for details.