

AD Self Service Tutorial

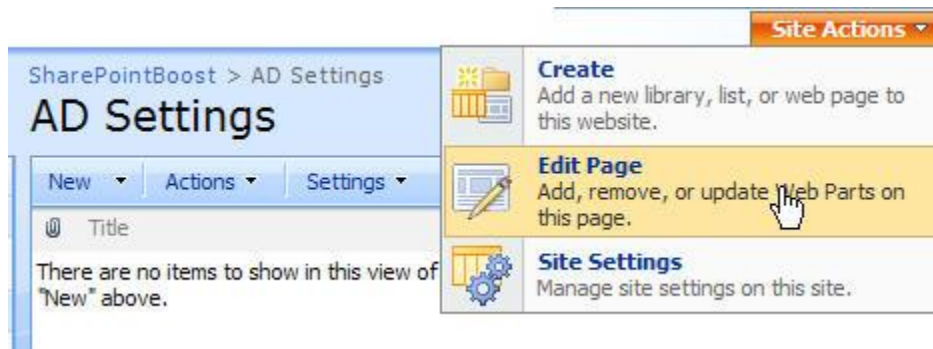
AD Self Service is an AJAX enhanced web part that allows users to change their own AD property information. It also gives administrators the option to receive emails, as well as keep logs to track changes made. Moreover, administrators can exclude certain users from editing this web part and select which AD properties are accessible.

In the web part settings page, the administrator can configure the layout of the web part; he can add & remove tabs and properties, and choose under which tab the properties should be displayed. The administrator can also specify which AD properties are editable, which are read-only, and which are invisible. For accessible properties, he can choose to allow users to type in entries, select from a preset dropdown list, or look up information from another SharePoint list.

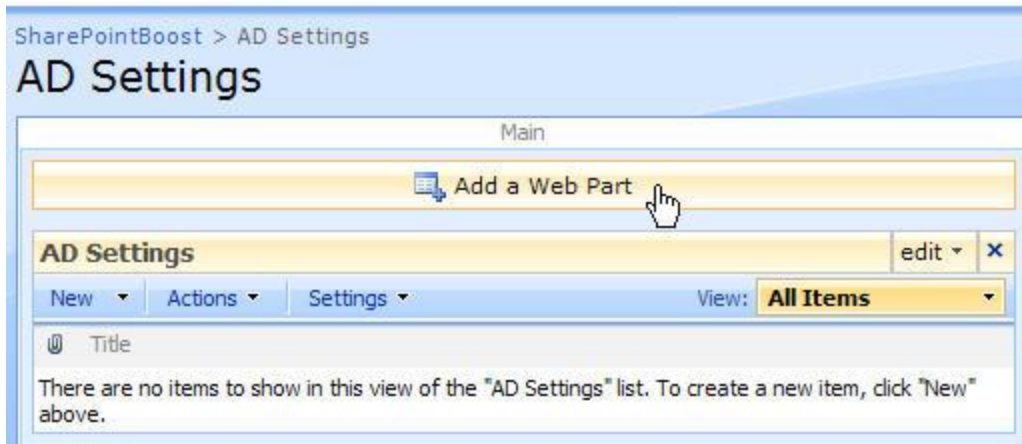
Once a user has changed his AD properties, the administrator (or any other specified user) will receive an email with details about the changes made. Alternatively, the administrator can check the AD Self Service log at any time for a summary of all AD account change details.

Adding the AD Self Service web part to a SharePoint site

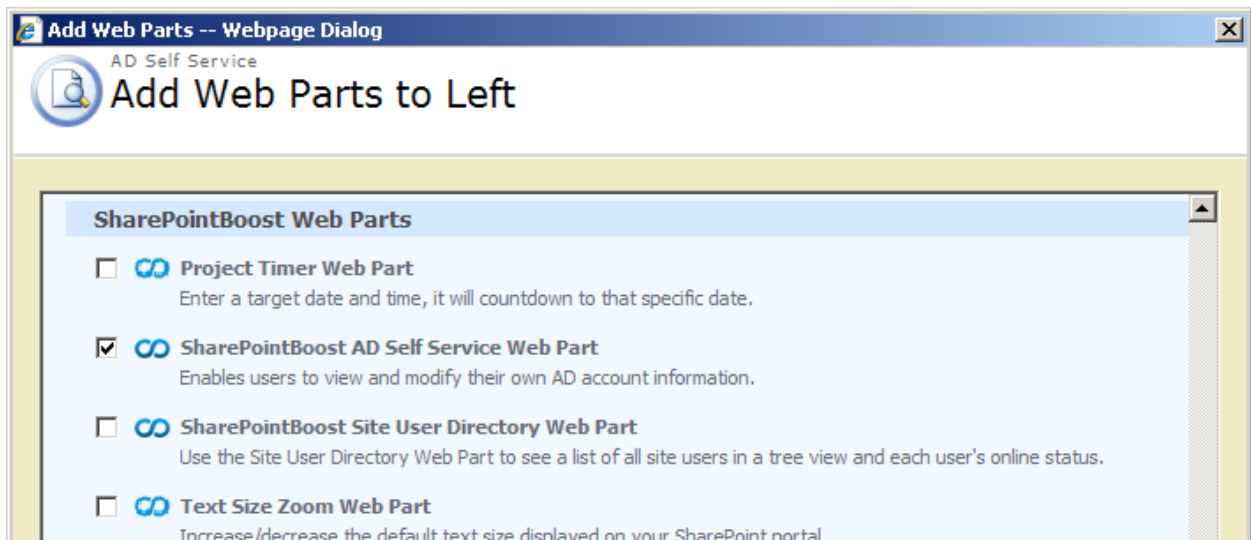
Open the site page on which you want to add AD Self Service. Then, click Edit Page on the Site Actions menu.



The site will be displayed in Edit Mode. Click the **Add a Web Part** button to open the **Add Web Parts Webpage Dialog**.



In the **Add Web Parts Webpage Dialog**, select **AD Self Service** by checking the **AD Self Service** checkbox in the **SharePointBoost Web Parts** group, and then click the Add button. An AD Self Service Web Part will be added to the page.



Configuring AD Self Service in SharePoint Central Administration

Once installed and activated, an AD Self Service link will appear in Central Administration on the Application Management page under the section titled **SharePointBoost Software Management**.

SharePointBoost Software Management

- [AD Self Service Settings \(Powered by SharePointBoost\)](#)

This link will direct you to the AD Self Service Settings in Central Administration.




Excluding Groups and Users

The first section of the settings allows the administrator to exclude users or groups from accessing the web part. Thus, the administrator can choose to keep AD property changes more secure by excluding users like interns or other short-term employees who use shared accounts.

Exclude Users/Groups

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

Excluded Users/Groups



Including AD Properties

In the next section, the administrator selects which AD properties should be available in the web part. If you upgrade from an earlier version, all previously displayed properties will be included by default.

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)
- E-mail:(mail)

Display Name:

Property Name:

AD Self Service provides a list of AD properties that are commonly used. To modify the Display Name, the administrator can select an AD property, enter a new Display Name and confirm by clicking Modify. To add new properties the administrator has to click the Add button. This opens a popup window where the Property Name and the Display Name of the property to add can be modified. Furthermore, the administrator can remove a property and restore all default properties.

Email Notification Settings

To receive email confirmation notifications, please check the checkbox on the left side of the next section. The Email Content box will then be accessible for initial setup and modifications.

AD Self Service Email Confirmation
Send a confirmation email to the administrator after users have changed their AD information.

Email Content

Subject:
AD properties changed

Message:

[Current User] changed the following AD properties on [Current Data Time]:
[Default Message]

Insert Expression Send message in HTML format Preview

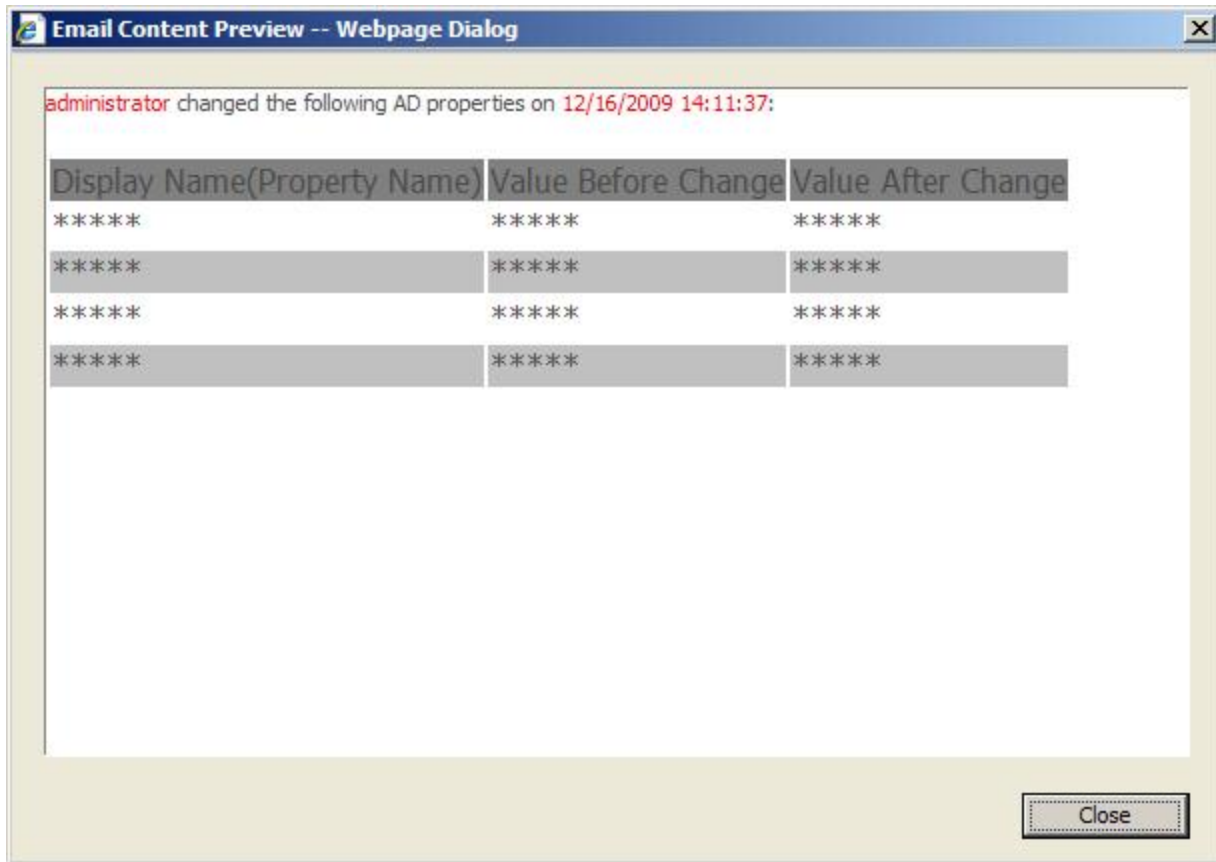
Specify Email Recipients:

Recipient email address(es):
Administrator@sharepointboost.com

Firstly, the administrator should specify the subject of the notification email. Then he should specify the email content. The administrator can choose to send the email as plain text, or as an HTML message. (For the HTML message, there are more formatting options available than there are with plain text.)

In the Message section, the administrator can specify how the message should be formatted and what information should be included. The fields available include information about the user who changed his AD properties, the date and time he changed them, and the “default message.” Note that the “default message” function will place a table summarizing all changes made into the body of the email.

After setting things up as wanted, the administrator can check his settings by clicking the Preview button.



Finally, the administrator should specify an email address that the AD property change notifications will be sent to. This could either be the administrator's email address, or any user's email as chosen by the administrator, like managers or supervisors.

AD Self Service Log Settings

The **AD Self Service Change Log** section allows the administrator to set AD Self Service log options.

Enable AD Property Change Log
Write log file on the server when users change their AD information.

AD Property Change Log Schedule Options:

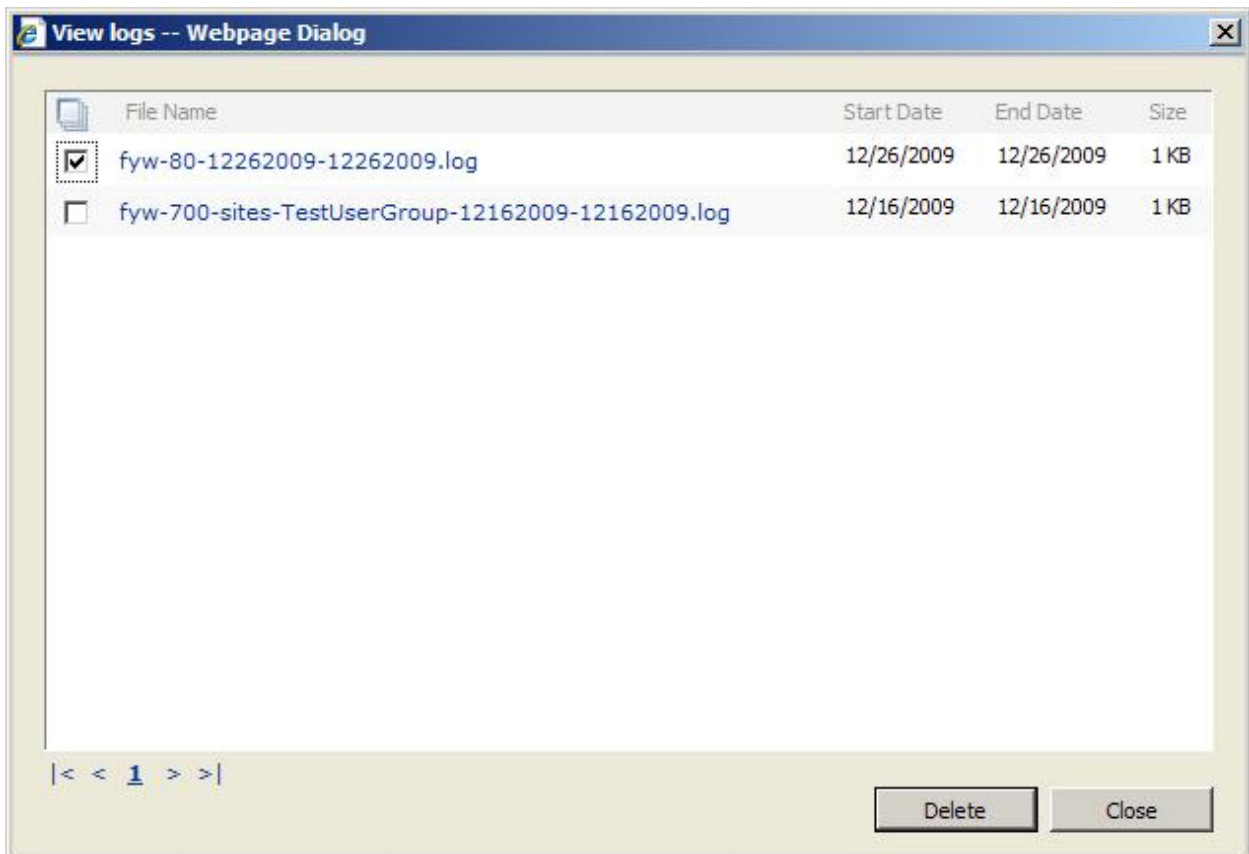
Monthly

Every days

Delete log from the server after days

The **SharePoint Property Change Log Schedule Options** specify how often a new log file should be created. It can either be set to create a new file monthly, or after a number of days (as specified by the administrator). The **Delete Logs** checkbox gives the user the option to delete the logs after a specified number of days.

The **View Logs** button opens a new window that allows you to select and view the log files. It also gives you to option to delete old log files.



The log files will be saved as .log files, so they can be edited in Notepad.

Timestamp	User	State	Display Name(Property Name)	Value Before Change	Value After Change
12-16-2009 14:20:29	wendy	Success	E-mail:(mail)	wen_123@gmail.com	wendy_123@gmail.com
12-16-2009 14:21:15	wendy	Success	Department:(department)		QA
12-16-2009 14:23:24	tom	Success	Company:(company)	brandysoft	Sharepointboost
			E-mail:(mail)		Tom1980@gmail.com
			Company:(company)		!sharepointboost

The AD Self Service Custom SMTP Settings

The last section lets the administrator customize the SMTP server settings. There is no need to customize these settings if the SMTP server settings are already configured in **SharePoint Central Administration**. So, the administrator just has to change these settings when he or she wants to specify customized settings for outgoing emails, and if he has enabled AD Self Service Email Notifications.

Enable Custom SMTP Server

You don't need to configure this setting if you have configured outgoing e-mail server settings in SharePoint Central Administration unless you want to send alert emails using custom SMTP server settings.

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

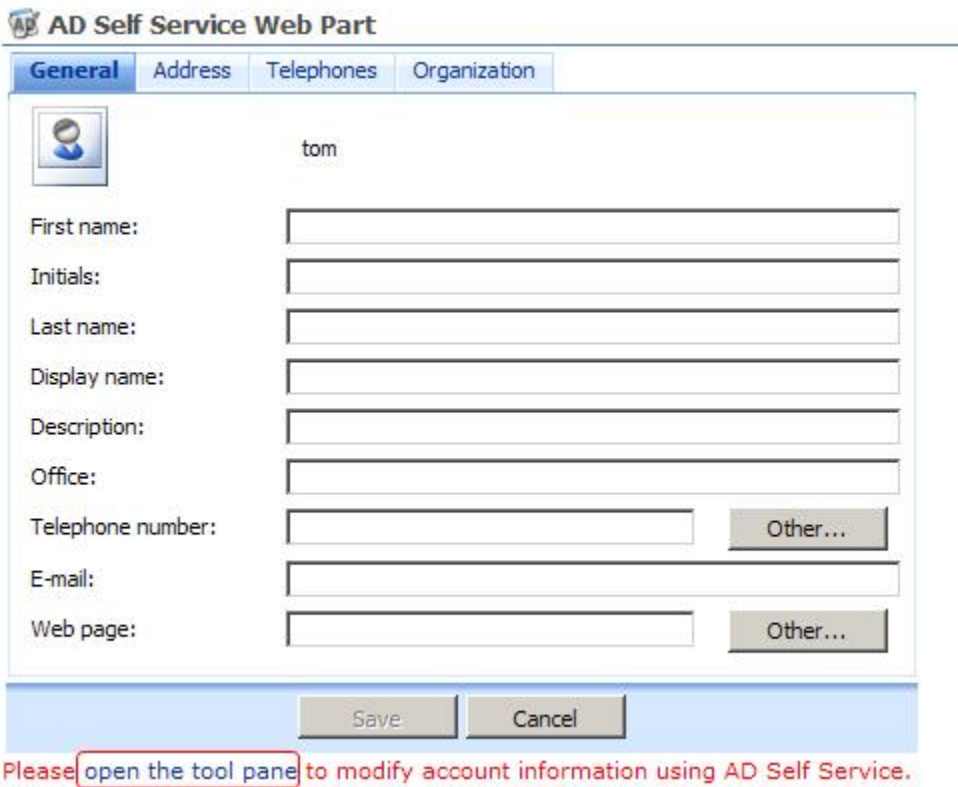
Password

Enable SSL connection

Everything from domain name/IP, port, display name, “From address,” and “Reply-to-address” can be customized. The administrator can also set to use either the default Windows login credentials or that of another user. The settings also allow enabling SSL connections.

Configuring AD Self Service in the Web Part Edit Mode

After adding the AD Self Service web part, click the **open the tool pane** hyperlink to configure account information for AD Self Service.

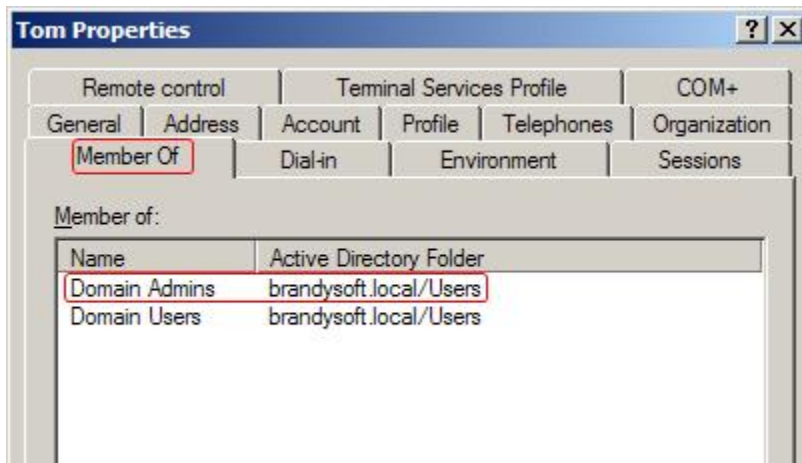
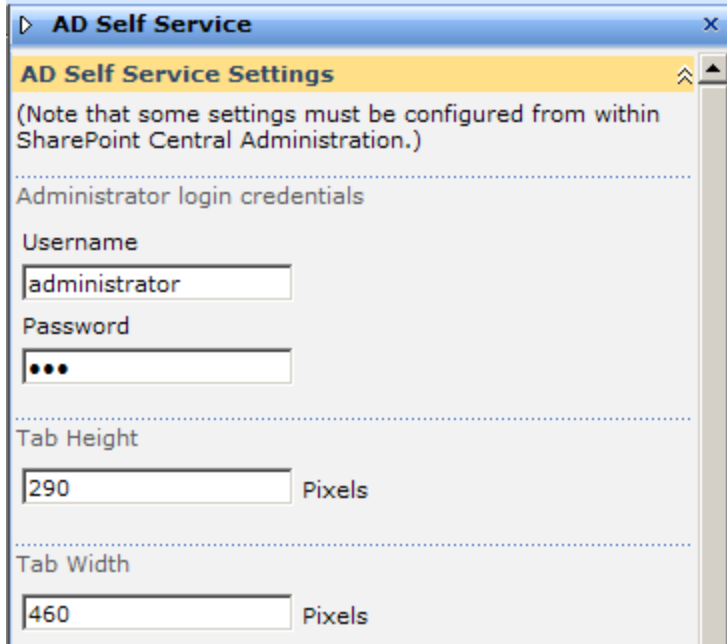


The screenshot shows the 'AD Self Service Web Part' configuration window. It has a title bar with the AD logo and the text 'AD Self Service Web Part'. Below the title bar are four tabs: 'General' (selected), 'Address', 'Telephones', and 'Organization'. The main area contains a profile picture placeholder (a blue circle with a white person icon) and the name 'tom'. Below this are several input fields: 'First name:', 'Initials:', 'Last name:', 'Display name:', 'Description:', 'Office:', 'Telephone number:', 'E-mail:', and 'Web page:'. The 'Telephone number:' and 'Web page:' fields have 'Other...' buttons next to them. At the bottom of the form are 'Save' and 'Cancel' buttons. Below the form, a red message reads: 'Please [open the tool pane](#) to modify account information using AD Self Service.'

Entering Domain Admin account information


Only users having **Design** or **Full Control permissions** can add and customize web parts. Thus, only users with these SharePoint permission levels can access the web part settings page to modify the web part settings and layout.

On the AD Self Service Settings page, enter the credentials of an account that is a member of the Domain Admins group. This account can modify users' AD information, so it is different from the SharePoint site collection user.



NOTE: If the account is not a member of **Domain Admins**, changes made to AD information in AD Self Service cannot be saved.

AD Self Service Web Part

General	Address	Telephones	Organization
	tom		
First name:	<input type="text" value="Tom"/>		
Initials:	<input type="text" value="He"/>		
Last name:	<input type="text" value="Brown"/>		
Display name:	<input type="text" value="Tom"/>		
Description:	<input type="text" value="Built-in account administrating the computer/domain."/>		
Office:	<input type="text" value="2001/78945"/>		
Telephone number:	<input type="text" value="12345"/>	<input type="button" value="Other..."/>	
E-mail:	<input type="text" value="Tom1980@gmail.com"/>		
Web page:	<input type="text" value="www.sharepointboost.com"/>	<input type="button" value="Other..."/>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

Failed to save user information. Please check your AD Self Service account settings. Details: General access denied error

Web Part Layout and AD Properties Settings

On initial setup, AD Self Service will provide four tabs, and include all default AD properties.

AD Self Service

AD Self Service Settings

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

Administrator login credentials

Username

Password

Tab Height
 Pixels

Tab Width
 Pixels

Property Settings

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

License Management

Managing Tabs

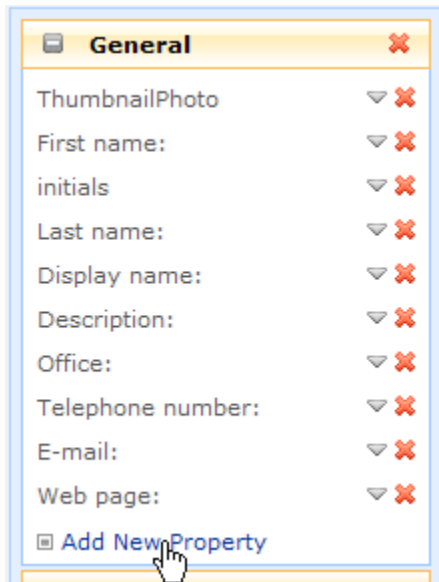
To create new tabs, the user has to click Add New Tab.

The tab will change to display a field allowing the user to edit the tab name. There, the user has to enter the name for the new tab, and press enter to confirm.

Changing the current Display Name of a tab will work in a similar way. The user has to click on the name of the tab and the field will change into an editable field allowing for changing the name of the tab.

Managing Properties

To add new properties, the administrator has to click the Add New Property button that is available under each tab.

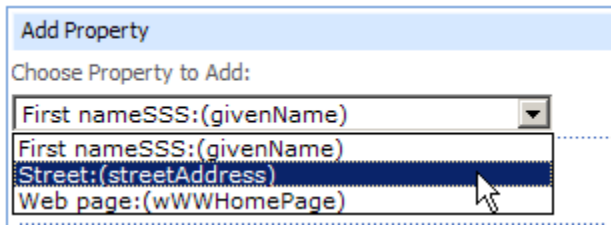


Then, a new box will appear inside the tool pane allowing the administrator to choose a property and what settings to apply.

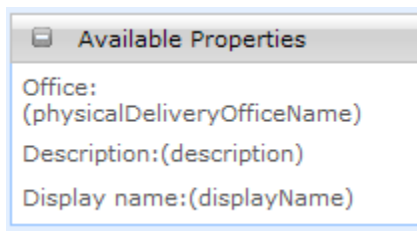
A screenshot of a dialog box titled 'Add Property'. It contains the following fields and controls:

- 'Choose Property to Add:' with a dropdown menu showing 'Display name:(displayName)'.
- 'Property Name' with a text box containing 'displayName'.
- 'Display Name' with a text box containing 'Display name:'.
- A checked checkbox labeled 'Allow users to edit this property'.
- An 'Appearance' section with a 'Display Style' dropdown menu showing 'Text box'.
- 'Rows' with a text box containing '1'.
- 'Add' and 'Cancel' buttons at the bottom.

The Property Select dropdown list displays all available AD properties. These include all properties made available in the Central Administration Settings for AD Self Service that have so far not been used when configuring the web part.



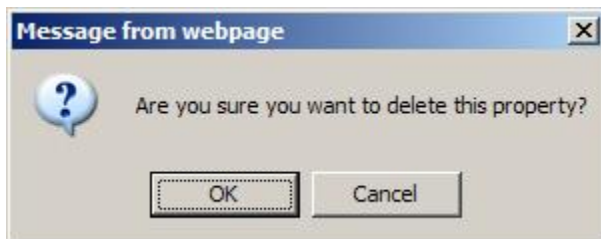
The complete list of available properties can also be found in the Available Properties section of the web part. This includes all AD properties specified in AD Self Service Central Administration settings, as well as AD properties previously deleted in the web part.



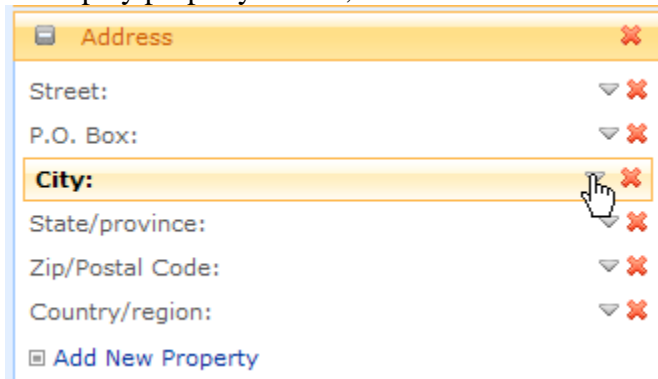
To delete AD properties from the web part, the administrator has to click on the red “x” on the right side of the property.



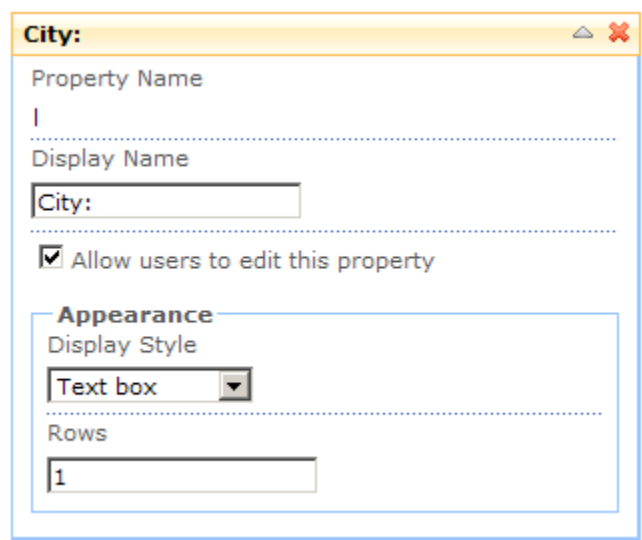
A popup window will open prompting for confirmation that the property should be removed.



To display property details, the user has to click the arrow in the top right corner of the property.



Then the property details will be displayed.



To make properties read-only, the administrator has to uncheck the “Allow users to edit this property” checkbox. Thus, the property would be displayed in the web part, however, the user would not be able to change it.

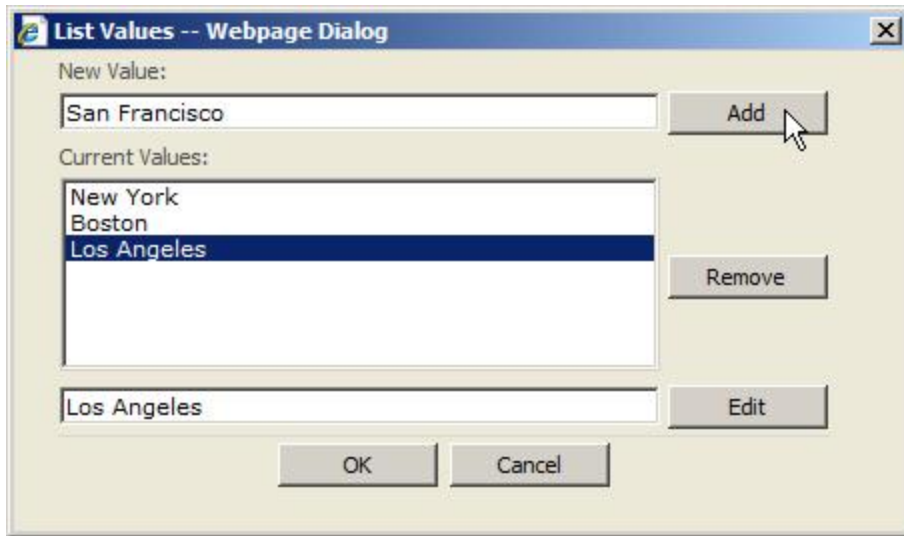
The screenshot shows a window titled "City:" with a yellow header bar. Inside, there are several sections: "Property Name" with a text box containing "I"; "Display Name" with a text box containing "City:"; a checked checkbox labeled "Allow users to edit this property" which is highlighted with a red dashed border; and an "Appearance" section. The "Appearance" section has a "Display Style" dropdown menu set to "Text box" and a "Rows" text box containing the number "1".

The Appearance settings allow the administrator to specify how the users should enter the information for the AD properties. If “Text box” is selected in the Dropdown menu, the administrator can select how many rows are available for editing.

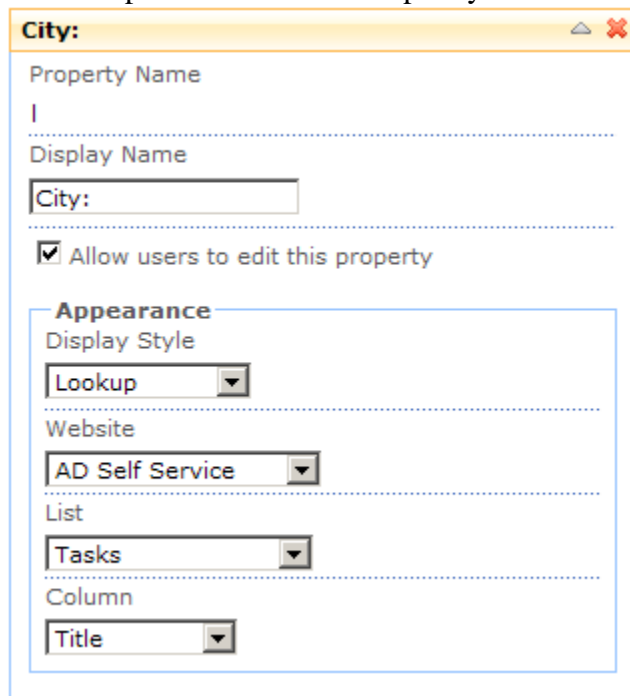
If the administrator selects dropdown list the Appearance settings box will change to display a button to specify the values.

This screenshot shows the same "City:" configuration window. The "Display Style" dropdown menu is now set to "Dropdown list". Below it, there is a "List Values" section with a "Set" button. The "Allow users to edit this property" checkbox remains checked.

Clicking the Set List Values button will open a popup window. There the administrator can specify which values are available, modify values, or delete values, if necessary.



The last option to choose is to specify a column to lookup from.



This allows the administrator to specify a column in any list in any site over the whole site collection to pull values from. When using AD Self Service, the user will be presented a dropdown list with all values available in this column.

AD Self Service supports Drag and Drop of items in the web part settings. Thus, the layout and setup of the tabs and properties can be easily changed.




Modify AD properties in AD Self Service

After configuring the web part and the account information, SharePoint site collection users can modify their AD information with the AD Self Service web part.

For instance, when Tom logs on to the site page, the AD Self Service web part will display Tom's AD information automatically. He will be able to modify his AD information based on the settings made. Checking on the Active Directory page, the properties have been modified.

AD Self Service Web Part

General | Address | Telephones | Organization

 tom

First name:

Initials:

Last name:

Display name:

Description:

Office:

Telephone number:


E-mail:

Web page:

Your changes have been saved.

Tom Properties [?] [X]

Member Of	Dial-in	Environment	Sessions		
Remote control	Terminal Services Profile		COM+		
General	Address	Account	Profile	Telephones	Organization

 Tom

First name: Initials:

Last name:

Display name:

Description:

Office:

Telephone number:

E-mail:

Web page: