SharePoint Password Change & Expiration 3.0

User Guide

Copyright

Copyright ©2022 BoostSolutions Co., Ltd. All rights reserved.

All materials contained in this publication are protected by Copyright and no part of this publication may be reproduced, modified, displayed, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior written consent of BoostSolutions.

Our web site: https://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 6
   2.6 Command Line Installation 6
   2.7 Feature Activation 8
3. How to Use Password Change 9
   3.1 Add Password Change Web Part to a Site 9
   3.2 Customize Password Change Web Part 10
      3.2.1 Configure Domain and Account 10
      3.2.2 Customize Password Policy 11
      3.2.3 Customize Error Messages 13
   3.3 Configure Password Change Settings 14
      3.3.1 Configure Password Expiration Notification Settings 16
      3.3.2 Configure Password Change Email Confirmation Settings 19
      3.3.3 Configure Password Change Log 20
      3.3.4 Customize SMTP Server Settings 21
      3.3.5 Customize Action in Welcome Menu 22
   3.4 Change Password 23
4. Password Expiration Warning Web Part 25
   4.1 Add Password Expiration Warning Web Part 25
   4.2 Customize Password Expiration Warning Web Part 26
5. Troubleshooting & Support 28

Appendix: License Management 29

1. Introduction

Product Introduction

SharePoint Password Change & Expiration allows AD, Local NT or Form-Authenticated users to change their own passwords from SharePoint without administrator intervention. This powerful Web Part can also send expiration notification emails to warn users before their passwords expire, send confirmation emails after users have successfully changed their passwords, customize error messages and store all password change activities in a convenient administrator's log.

Product Feature List

- Supports Active Directory Services, NT Directory Services, and Forms Authentication (incl. SqlMembershipProvider and LdapMembershipProvider)
- Send password expiration notification email
- Schedule email notification
- Send password change confirmation email
- Log and track password changes

About this User Guide

This user guide is intended to instruct you on how to install/uninstall, configure and use SharePoint Password Change & Expiration. For the latest copy of this user guide and other guides, please visit https://www.boostsolutions.com/download-documentation.html

2. Installation

2.1 Product Files

After you download and unzip the Password Change zip file from https://www.boostsolutions.com, you will find the following files:

Path	Descriptions
Setup.exe	A program to install and deploy the WSP solution packages to the SharePoint farm
SharePoint Password Change & Expiration _V3_User Guide.pdf	User guide for SharePoint Password Change & Expiration in PDF format.
EULA.rtf	The product End-User-License-Agreement
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\4.6\Setup.exe	The product installer for .Net Framework 4.6.
Library\4.6\Setup.exe.config	A file that contains the configuration information for the installer.
Solutions\Foundtion\ BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package that contains Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundtion\ BoostSolutions.FoundationSetup16.1.wsp	A SharePoint solution package that contains Foundation files and resources for SharePoint 2016/2019/Subscription Edition.
Solutions\PasswordChange\ BoostSolutions.PasswordChangeSetup15.3.wsp	A SharePoint solution package that contains product files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\PasswordChange\ BoostSolutions.PasswordChangeSetup16.3.wsp	A SharePoint solution package that contains product files and resources for SharePoint 2016/2019/Subscription Edition.
Solutions\PasswordChange\ Install.config	A file that contains the configuration information for the installer.

2.2 System Requirements

Before you install Password Change & Expiration, make sure that your system meets the following requirements:

SharePoint Server Subscription Edition

Operating System	Microsoft Windows Server 2019 Standard or Datacenter Microsoft Windows Server 2022 Standard or Datacenter
Server	Microsoft SharePoint Server Subscription Edition
Browser	Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2019

Operating System	Microsoft Windows Server 2016 Standard or Datacenter Microsoft 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 and greater Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2013

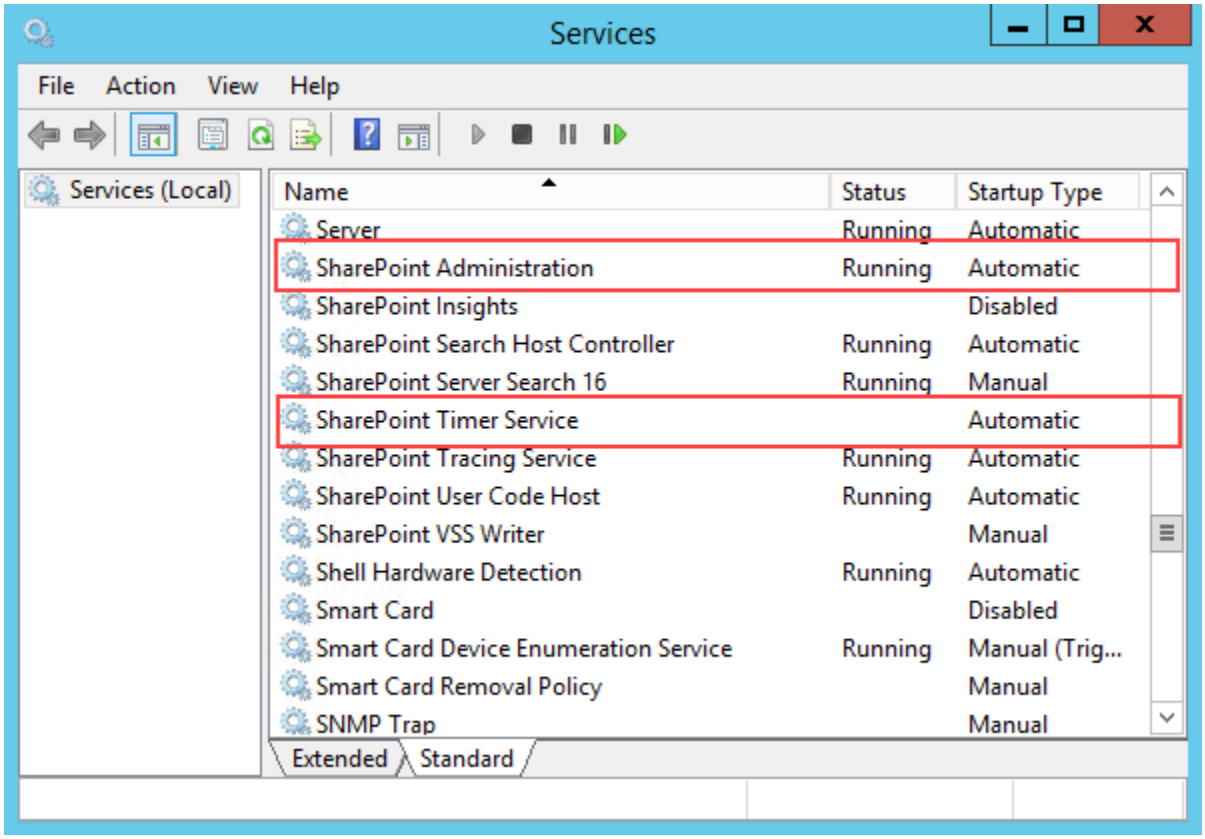
Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2008 R2 SP1
Server	Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013 Microsoft .NET Framework 4.5
Browser	Microsoft Internet Explorer 8 or greater Microsoft Edge Mozilla Firefox Google Chrome

2.3 Installation

Follow the steps below to install Password Change & Expiration on your SharePoint servers.

Installation Preconditions

Before you install Password Change & Expiration, please make sure the following services are started on your SharePoint servers: **SharePoint Administration** and **SharePoint Timer Service**.



Password Change & Expiration 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 Password Change & Expiration on SharePoint Server

a. Download the zip file (*.zip) of Password Change 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 Password Change & Expiration. 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 Password Change & Expiration has been installed. Click **Close**.

2.4 Upgrade

Download the latest version of Password Change & Expiration and run the **Setup.exe** file.

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

2.5 Uninstallation

If you want to uninstall Password Change & Expiration, 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 Password Change & Expiration in **SharePoint 2016** 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 Password Change & Expiration to SharePoint Servers

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

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

```
stsadm -o addsolution -filename BoostSolutions.PasswordChangeSetup16.3.wsp
stsadm -o addsolution -filename BoostSolutions.FoundationSetup16.1.wsp
```

d. Deploy the added solution with the following command:

```
stsadm -o deploysolution -name BoostSolutions.PasswordChangeSetup16.3.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.PasswordChangeSetup16.3.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.Admin.PasswordChage –url [site collection url] –force

stsadm -o activatefeature -name Brandysoft.ShareOint.Admin.PasswordChage.EmailNotification –url [virtual server url] –force

Remove Password Change & Expiration from SharePoint Server

a. Removal is initiated with the following command:

stsadm -o retractsolution -name BoostSolutions.PasswordChangeSetup16.3.wsp -immediate -url [virtual server url]

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.PasswordChangeSetup16.3.wsp

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.PasswordChangeSetup16.3.wsp

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

2.7 Feature Activation

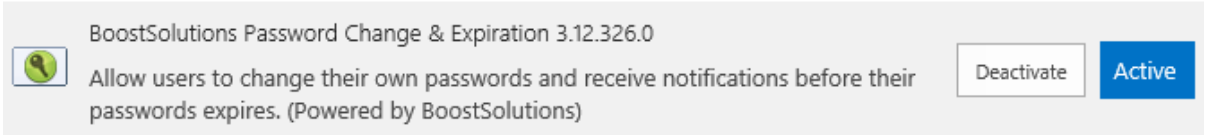
Activate Password Change & Expiration

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

a. Click **Settings** and then 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**.



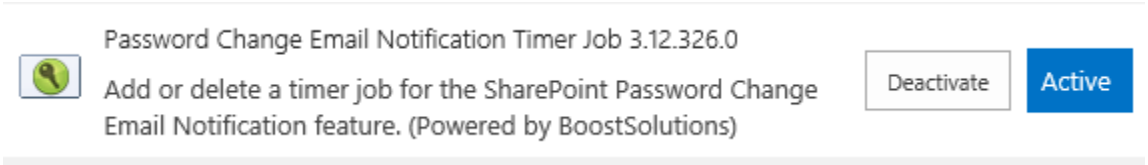
Activate Password Change Email Notification Timer Job

If the **Password Change Email Notification Timer Job** is not activated, follow the steps below to activate it.

a. Go to **Central Administration**. Click **Manage web applications** under **Application Management**.

b. Select a web application you want to configure and click **Manage Features** on the ribbon.

c. In the **Manage Web Application Features** window, find the **Password Change Email Notification Timer Job**, and then click **Activate**.

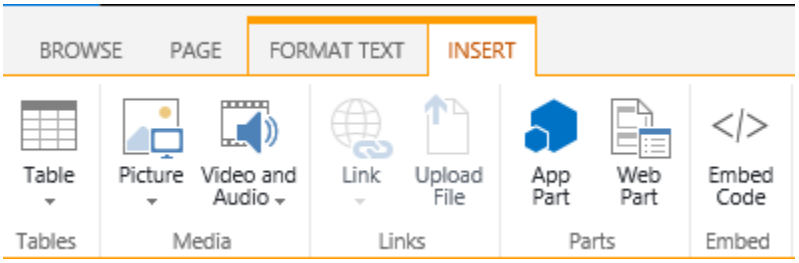


3. How to Use Password Change

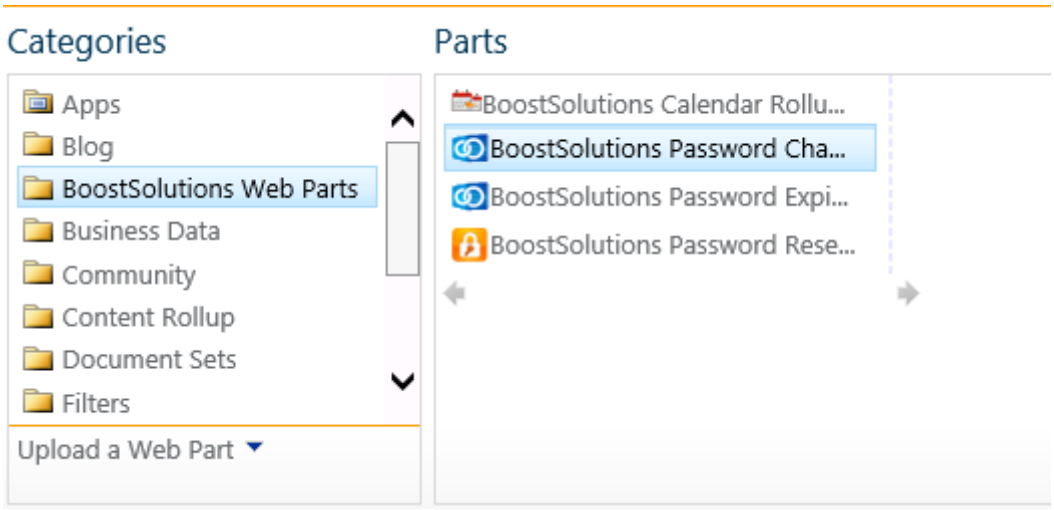
3.1 Add Password Change Web Part to a Site

a. Enter a page or site which you want to add the Password Change Web Part to, click Settings and then click **Edit Page**.

b. On the ribbon, click **Insert** tab, and then click **Web Part**.



c. In the **Categories** section, click **BoostSolutions Web Parts**, select **BoostSolutions Password Change Web Part**, and then click **Add**.



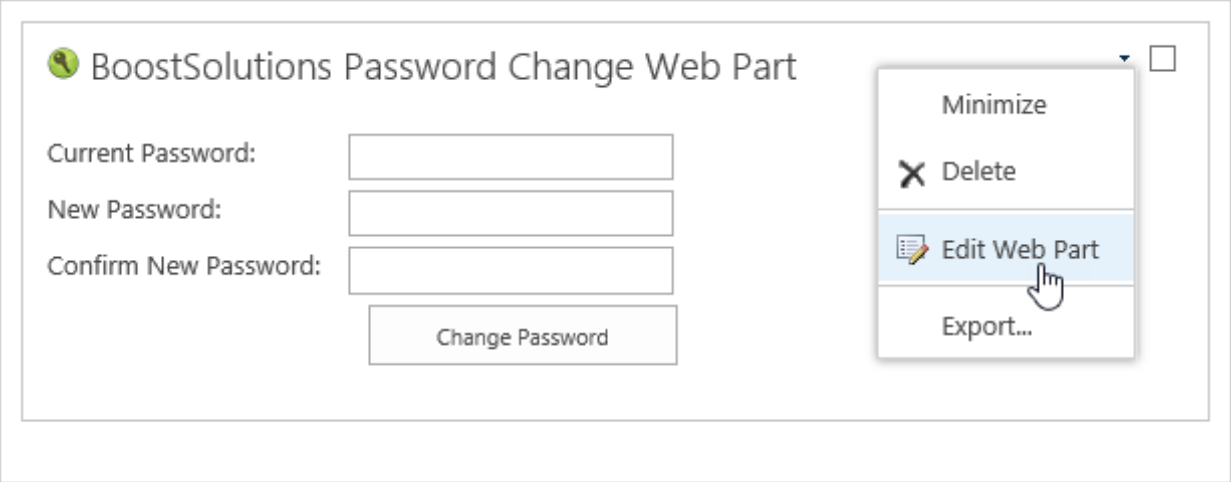
d. Click **Save** to save your operation and exit the edit page mode.

> ***Note***
>
> You must have **Customize Pages** permission to the current site to add and edit the Web Part.

3.2 Customize Password Change Web Part

If you want to customize Password Change Web Part. click **Settings** and then click **Edit Page**.

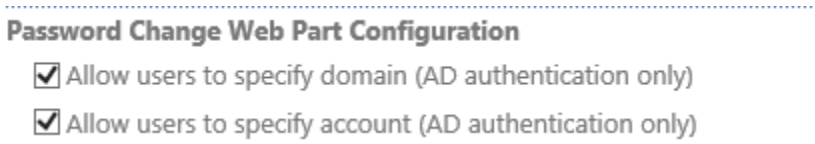
And on the Web Part drop-down menu, click **Edit Web Part**.



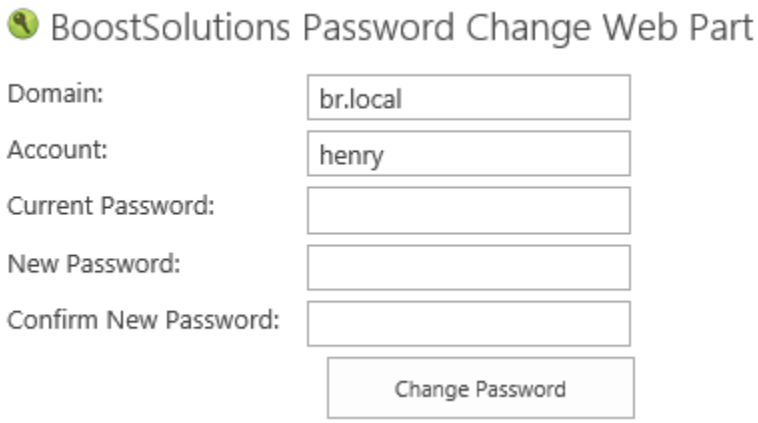
3.2.1 Configure Domain and Account

On the Password Change Web Part, you can specify whether the domain and account are shown and editable for users.

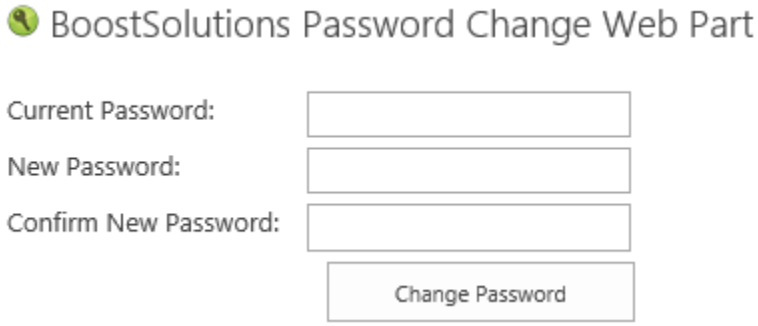
In the **Password Change Web Part Configuration** section, select the **Allow users to specify domain (AD authentication only)** and **Allow users to specify account (AD authentication only)** check boxes. These options are available for AD authentication only.



When these options are selected, users can specify other domain and account names when they change their password.



If these options are not selected, users can only change their current password.



Note

Domain and **Account** are only available in the Password Change Web Part. Users will not find them when they change their password using the password change page.

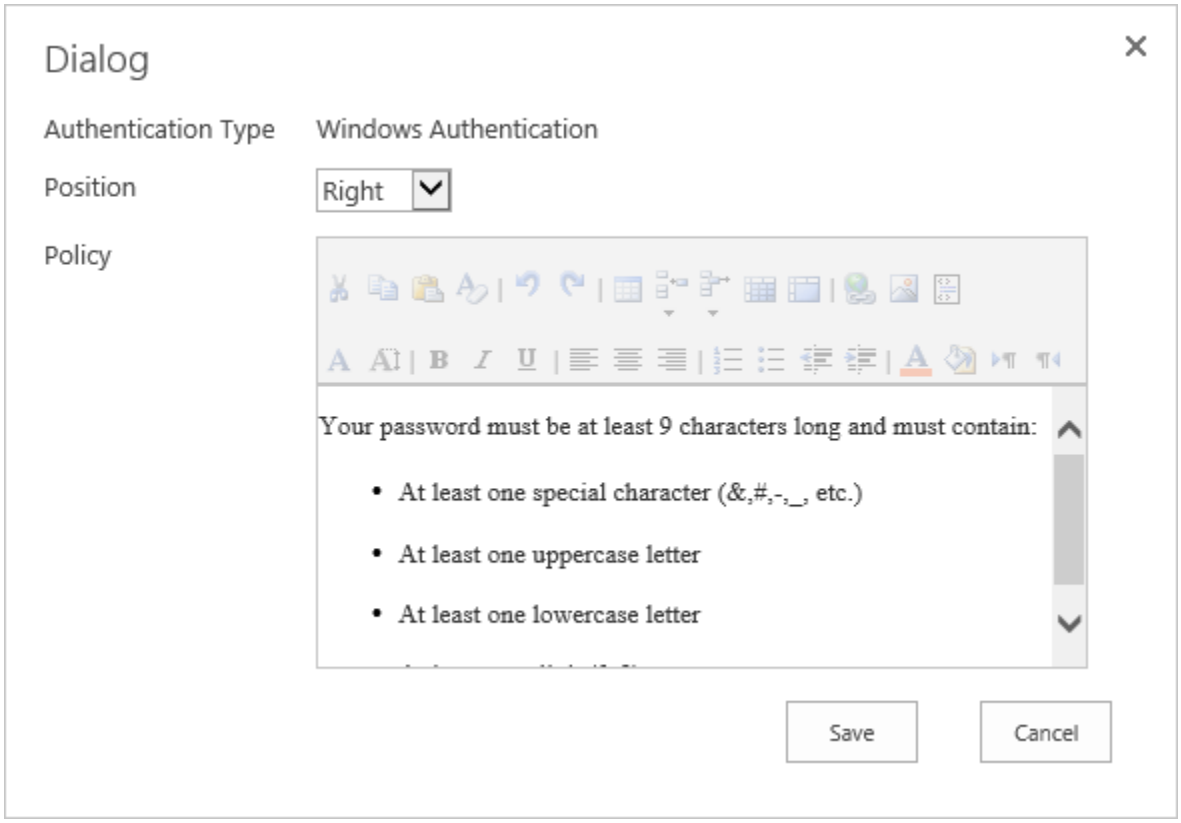
3.2.2 Customize Password Policy

In **Password Change Web Part Configuration** section, you can specify if the password policy will be displayed to users when they change password via the Web Part.

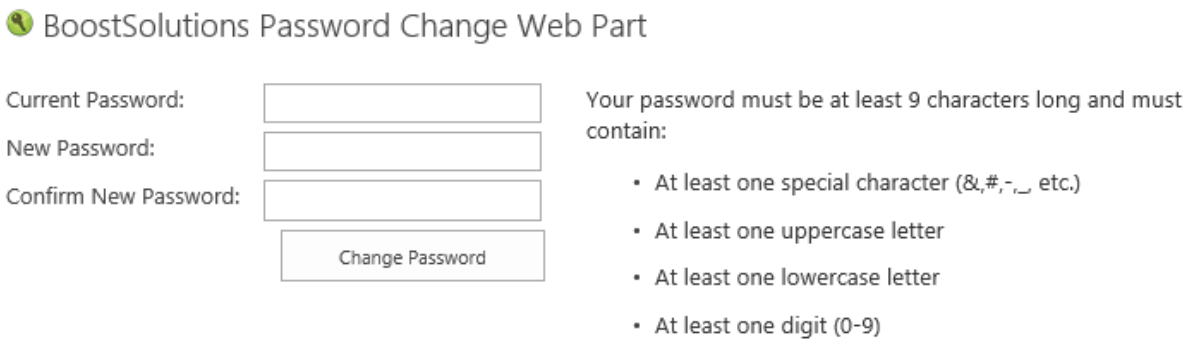
☑ Display password policy

Authentication Type	Position	Policy
Windows Authentication	Right	Your password must be at least 9 characters long and must contain: • At least one special character (&,#,-,_, etc.) • At least one uppercase letter • At least one lowercase letter • At least one digit (0-9)
Form Base Authentication	Right	

You can also edit the password policy. To edit the password policy, click **Edit**. In the **Dialog** window that appears, customize the policy message in the **Policy** section and select the position to display it in the **Position** section. After all is done, click **Save**.



Click **Apply** and **OK**. When a user log in, the Web Part will look like:



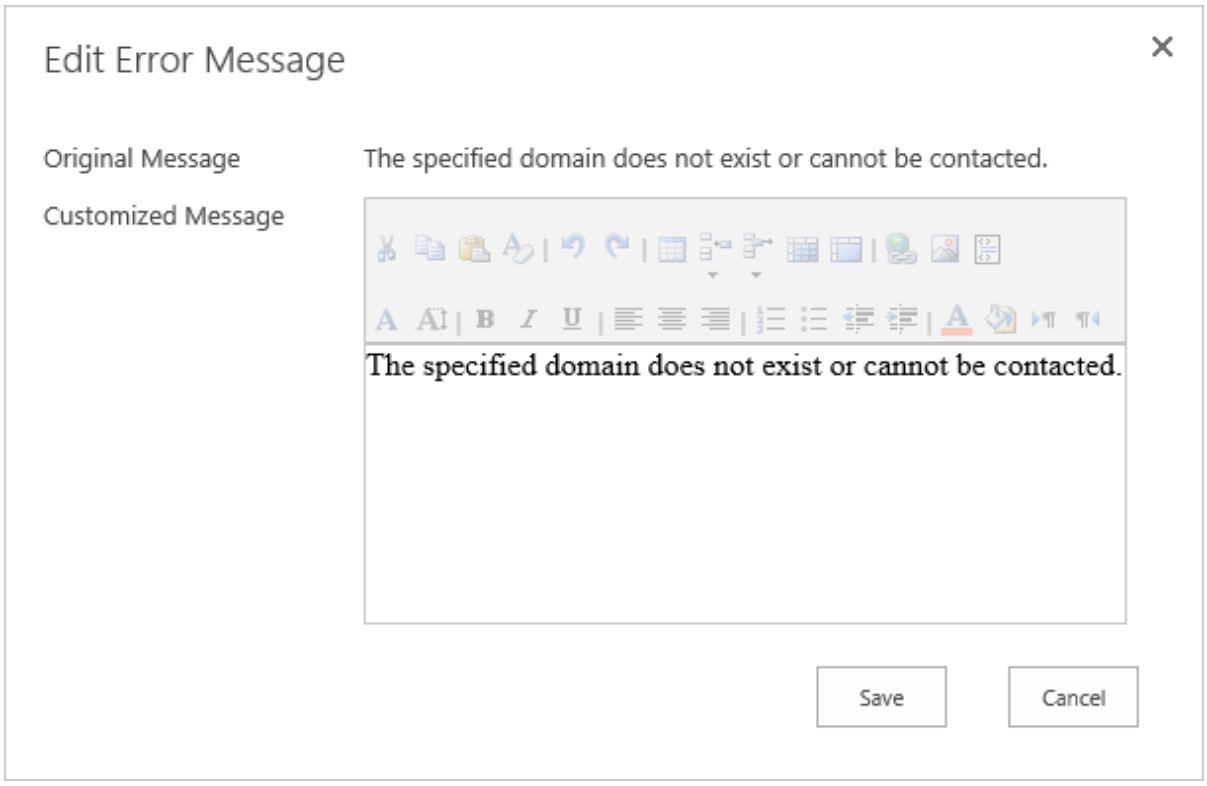
3.2.3 Customize Error Messages

In **Password Change Web Part Configuration** section, you can customize Windows Authentication or Form Base Authentication error messages and their styles.

Customize Error Messages and Style

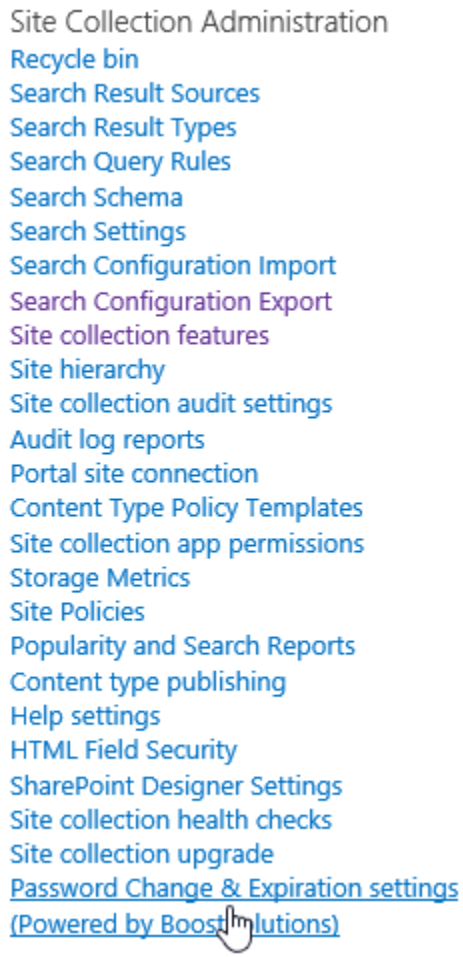
Original Message	Customized Message	Click to Edit
Expiration Warning Message		
[Username]'s password will expire in [Days until password expires] days.	[Username]'s password will expire in [Days until password expires] days.	Edit...
Window Authentication Error Message		
The specified domain does not exist or cannot be contacted.	The specified domain does not exist or cannot be contacted.	Edit...
User does not exist.	User does not exist.	Edit...
Password is invalid.	Password is invalid.	Edit...
[Username] cannot change password.	[Username] cannot change password.	Edit...
[Username] is disabled. Password cannot be changed.	[Username] is disabled. Password cannot be changed.	Edit...
[Username] is locked out.	[Username] is locked out.	Edit...
The length of parameter 'New Password' needs to be greater or equal to '[MinRequiredPasswordLength]'.	The length of parameter 'New Password' needs to be greater or equal to '[MinRequiredPasswordLength]'.	Edit...
The password does not meet the password complexity policy requirements.	The password does not meet the password complexity policy requirements.	Edit...
You can modify password after [MinPasswordAgeDateTime].	You can modify password after [MinPasswordAgeDateTime].	Edit...
'New password' does not meet policy.	'New password' does not meet policy.	Edit...
Form Base Authentication Error Message		
User does not exist.	User does not exist.	Edit...
Password is invalid.	Password is invalid.	Edit...
[Username] is disabled. Password cannot be changed.	[Username] is disabled. Password cannot be changed.	Edit...
[Username] is locked out.	[Username] is locked out.	Edit...
The length of parameter 'New Password' must be greater or equal to '[MinRequiredPasswordLength]'.	The length of parameter 'New Password' must be greater or equal to '[MinRequiredPasswordLength]'.	Edit...
'New Password' needs more [MinRequiredNonalPhanumericChars] non alpha numeric characters.	'New Password' needs more [MinRequiredNonalPhanumericChars] non alpha numeric characters.	Edit...
'New Password' does not match regular expression.	'New Password' does not match regular expression.	Edit...
The length of parameter 'New Password' cannot to be greater than 128 chars.	The length of parameter 'New Password' cannot to be greater than 128 chars.	Edit...
LDAP connection error. Please contact administrator to confirm connection account is valid.	LDAP connection error. Please contact administrator to confirm connection account is valid.	Edit...

To customize an error message, click the **Edit** button next to the error message. The original message is displayed and also available in the text box to help you personalize your message. To have a custom message, edit the message in the text box.

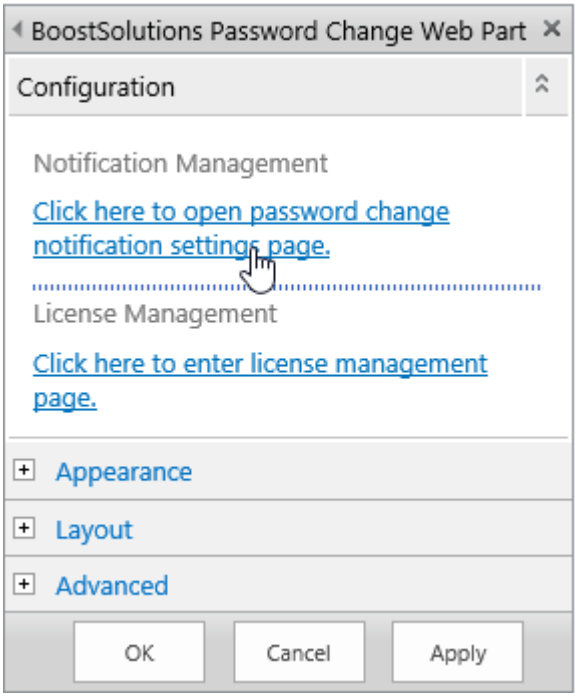


3.3 Configure Password Change Settings

Click **Settings** and then click **Site Settings**. Under **Site Collection Administration**, click **Password Change & Expiration settings** to enter the **Password Change & Expiration Settings** page.



The settings page can also be accessed directly via the Password Change Web Part. Click **Edit Web Part**. And then click the link **Click here to open password change notification settings page** under **Notification Management.**



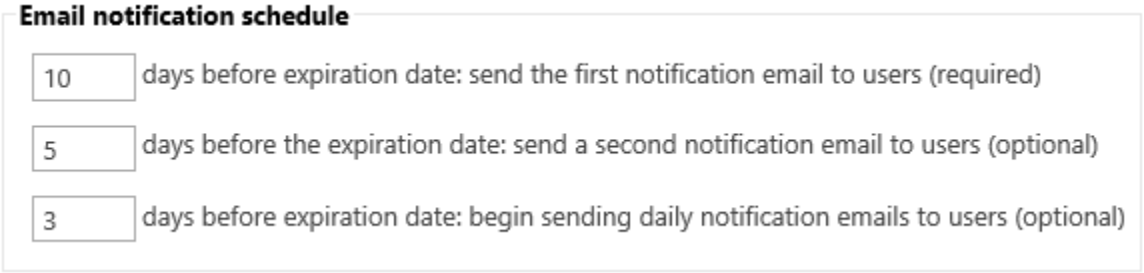
3.3.1 Configure Password Expiration Notification Settings

After you enable the **Password Expiration Notification,** you can set an email notification schedule, exclude site users/groups from receiving notification emails and customize notification emails.

Customize Email Notification Schedule

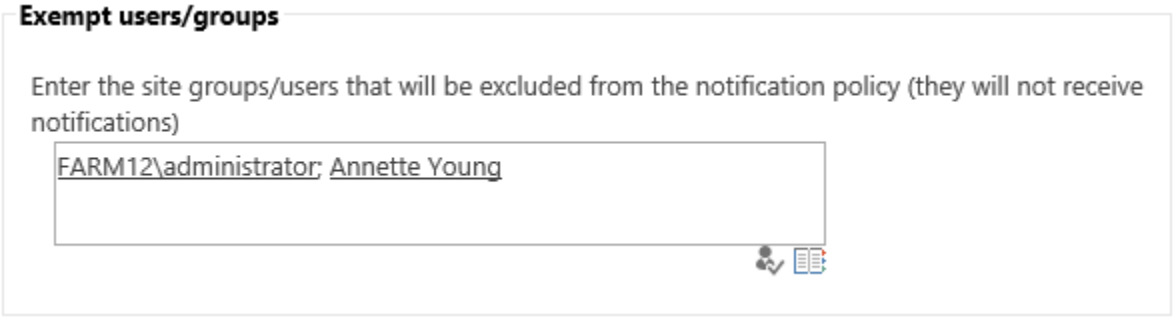
In the **Email notification schedule** section, specify when and how often email notifications should be sent to users before their passwords expire. You can use the default schedule settings or customize the schedule to suit your needs. You must specify the number of days (Default: 10) before the expiration date to send users a first email notification.

Optionally you can specify the number of days (Default: 5) before the expiration date to send users a second email notification. It is also optional to specify the number of days (Default: 3) before the expiration date to start sending users daily email notification.



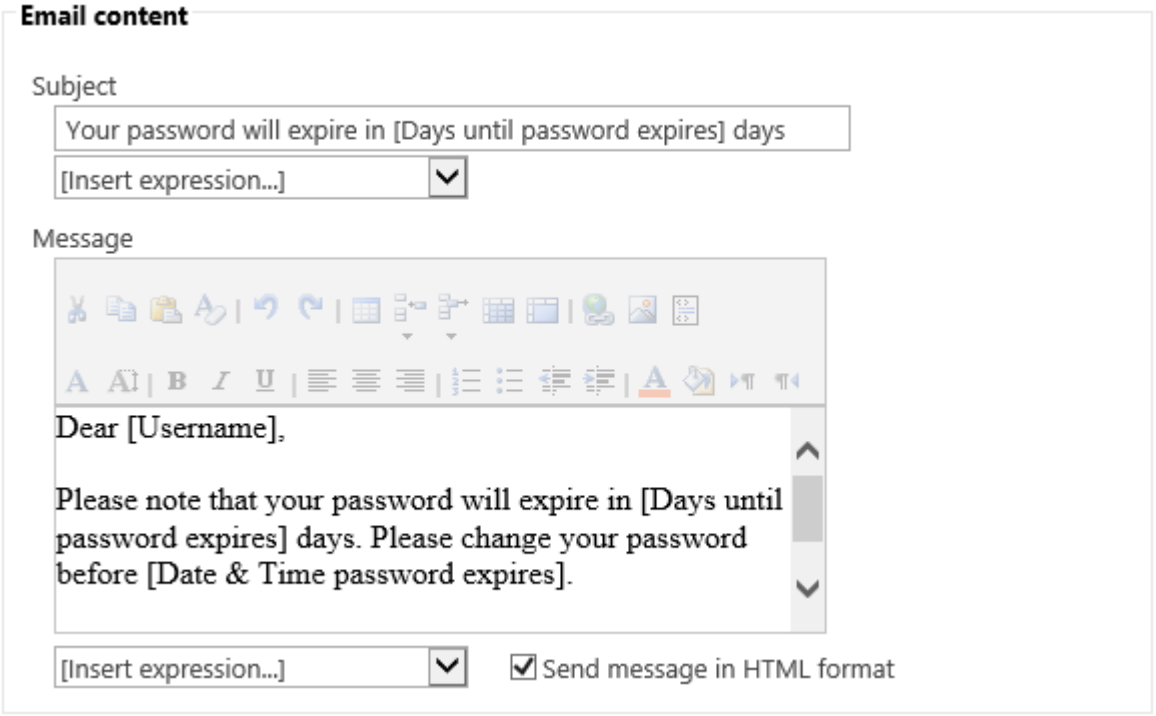
Exclude Users/Groups

In the **Exempt users/groups** section, specify the site users/groups that you want to exclude from receiving notification emails.

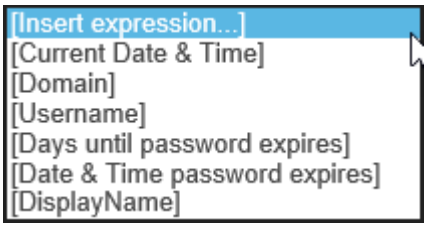


Customize Notification Emails

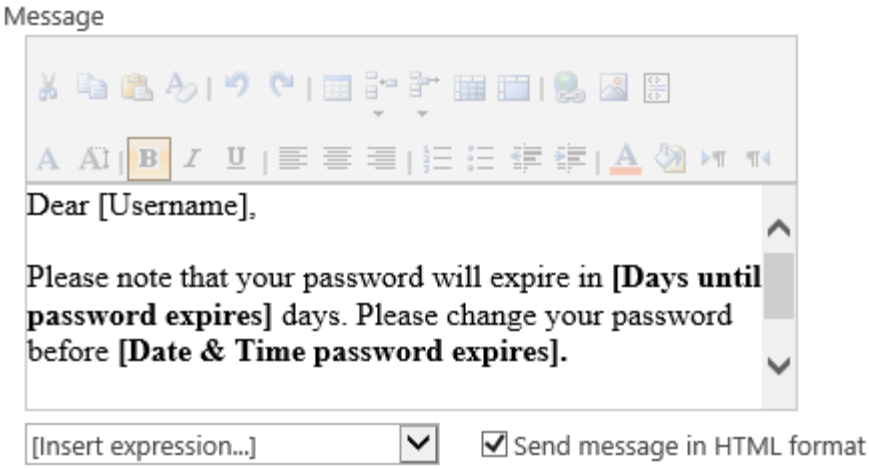
In the **Email content** section, enter the subject and message of the notification.



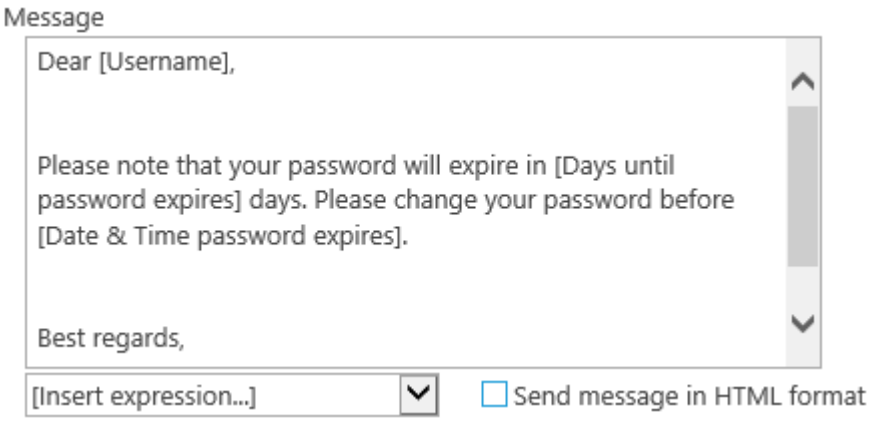
You can insert expressions in the text for both **Subject** and **Message**. Available expressions include Current Date & Time, Domain, Username, Days until password expires, Date & Time password expires and DisplayName.



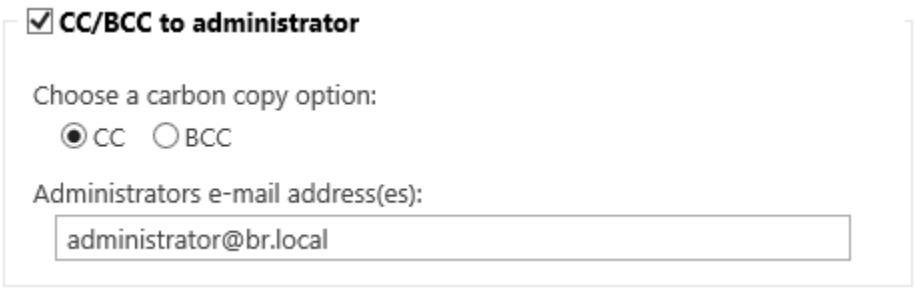
You can send the message in HTML format. If you enable **Send message in HTML format**, more editing options are available.



If you want to send the message in plain text, uncheck the **Send message in HTML format** checkbox.



If you enable **CC/BCC to administrator**, you can CC or BCC the notification email to the administrator. Enter the administrators email address(es).

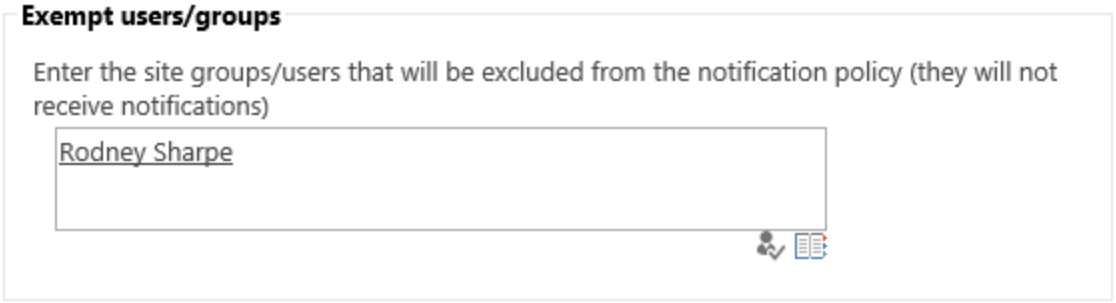


3.3.2 Configure Password Change Email Confirmation Settings

If you enable **Password Change Email Confirmation**, you can send a confirmation email to users after their passwords have been changed. The configuration is similar to that of **Password Expiration Notification settings.**

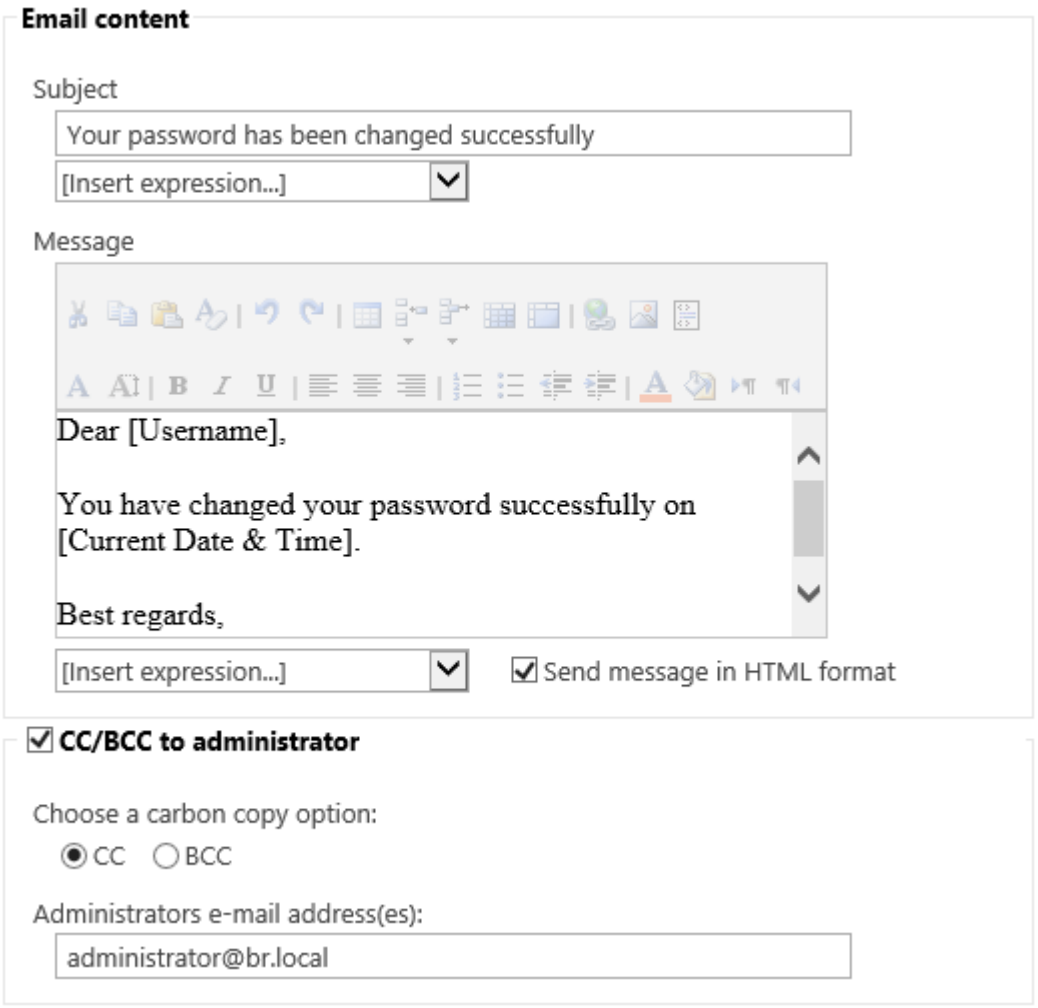
Exclude Groups/Users

In the **Exempt users/groups** section, specify the site users/groups that you want to exclude from receiving the confirmation emails.



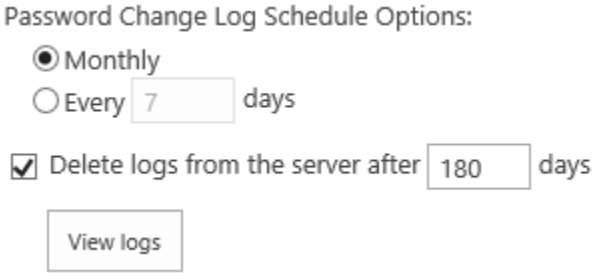
Customize the Confirmation Emails

The customization of password change confirmation emails is similar to that of the password expiration notification emails. Enter the subject and message of the email. Also, you can insert expressions in the text for both subject and message, send the email in plain text or in HTML format, and CC/BCC the email to the administrator.



3.3.3 Configure Password Change Log

The **Enable Password Change Log** section allows you to set the password change log schedule options.



Monthly: Generate log files once every month.

Every n days: Generate log files once every n days. Specify the number of days (Default: 7).

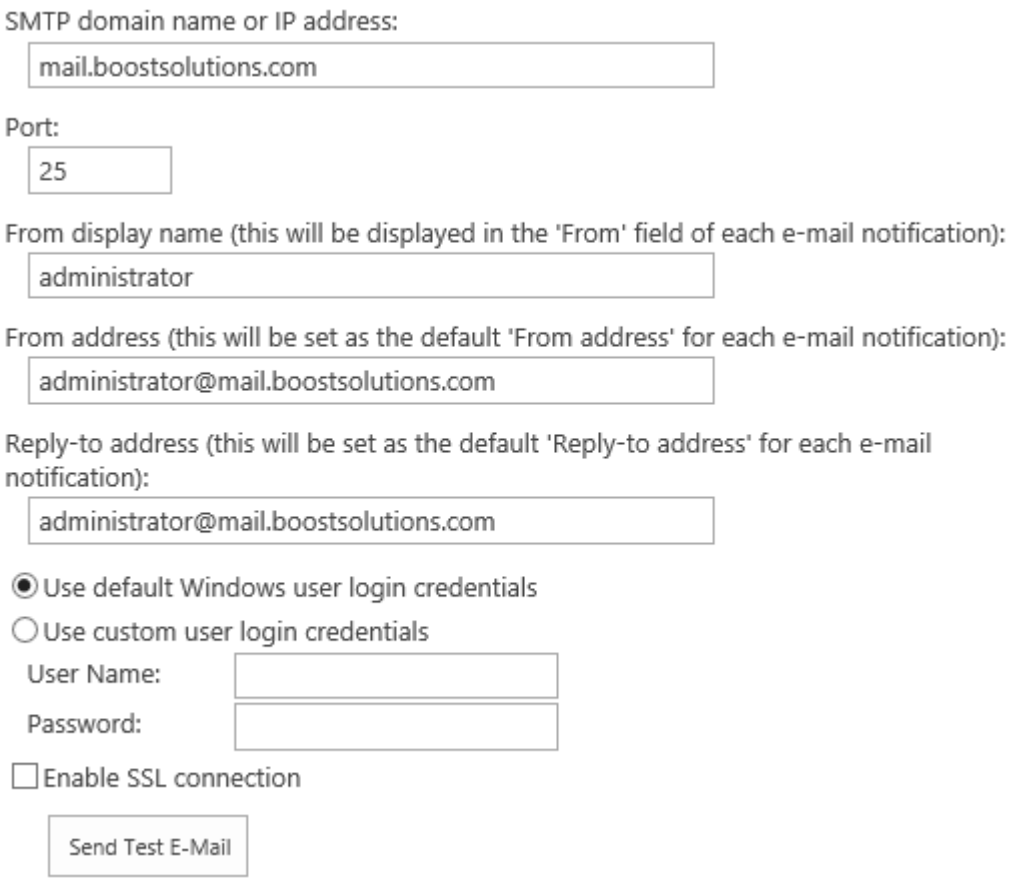
Delete logs from the server after n days: Delete log files from the server after a specified number of days (Default: 180).

After users have changed their passwords via Password Change Web Part, you can view logs. To view logs, click **View logs**.

3.3.4 Customize SMTP Server Settings

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

In the corresponding boxes, enter the SMTP server domain name or IP address, port number, from display name, from address, reply-to address. Select the authentication type. If you select **Custom authentication**, enter the user credentials. If you want to enable SSL connection, select the **Enable SSL connection** check box; if you don't want to enable SSL connection, clear this check box.

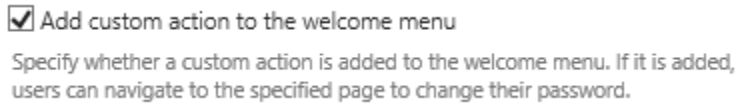


3.3.5 Customize Action in Welcome Menu

Besides the Web Part, you can also add custom actions to the welcome menu. When user login, they can click the custom actions to navigate to a specified page to change their passwords.

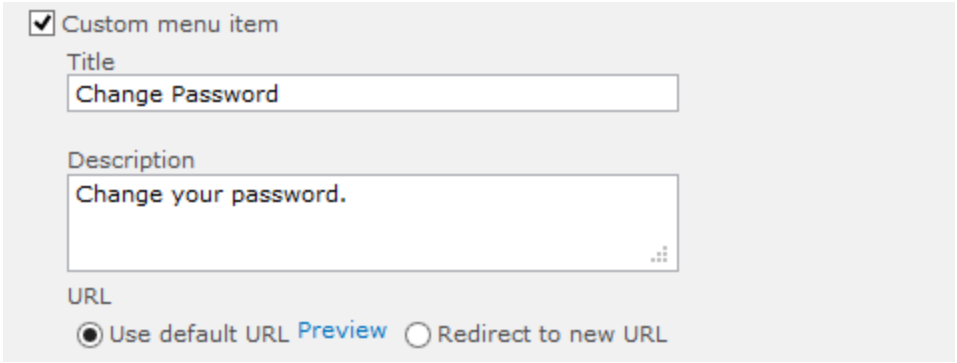
You can also specify a custom URL where you want users to change their passwords.

To enable a custom action, select **Add custom action to the welcome menu**. Then specify the menu item.



By default, this product will provide a menu item title, description for the welcome menu and provide a predefined URL where users can go to change their passwords.

However, if you want to customize these settings, select the **Custom menu item** option.



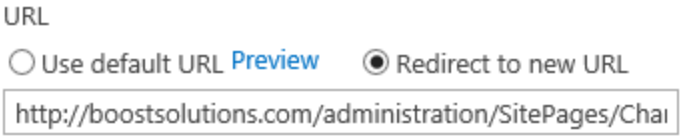
a. In the Title box, specify a title for the menu item.

b. In the Description box, enter a description.

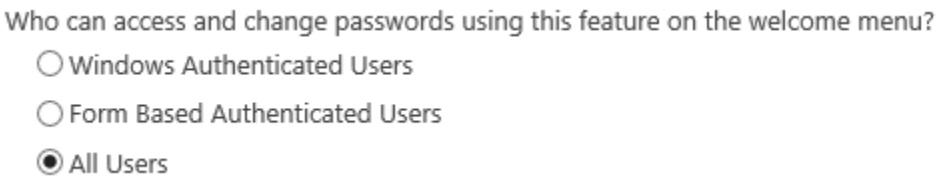
c. In the URL section, specify the URL for the password change page where users can change their passwords.

   If you want to use the predefined URL provided by Password Change, select **Use default URL**.

   If you want to use a different page, select **Redirect to a new URL** and enter the new URL.



d. And then specify who can access and change password via welcome menu.

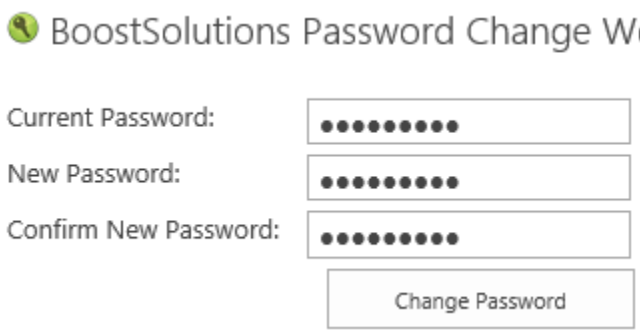


3.4 Change Password

Users can change their current domain passwords from within the Password Change Web Part or in the password change page.

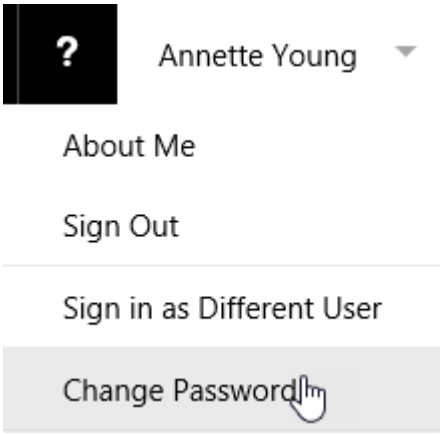
a. Enter the page which is inserted a Password Change Web Part.

b. Enter the current password, new password, confirm the new password and then click **Change Password**.

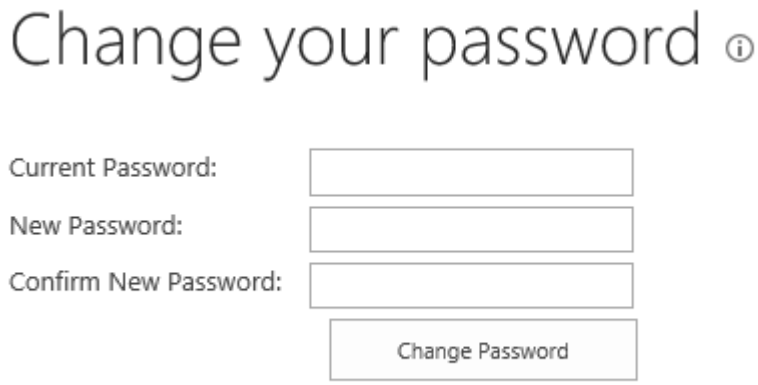


Users can also access the change password page to change their passwords.

a. On the welcome menu, click **Change Password** to enter the password change page.



b. On the Change your own password page, enter the current password, new password, confirm the new password and then click **Change Password** button.

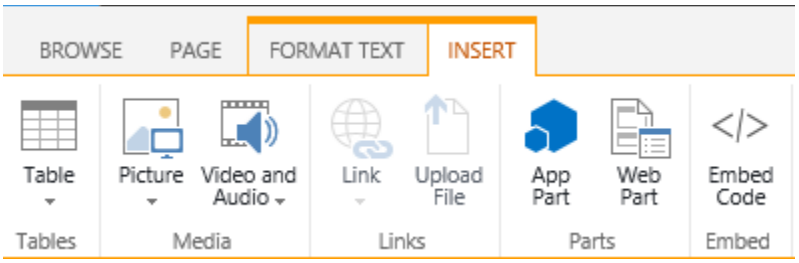

Change your password
Current Password:
New Password:
Confirm New Password:
Change Password

4. Password Expiration Warning Web Part

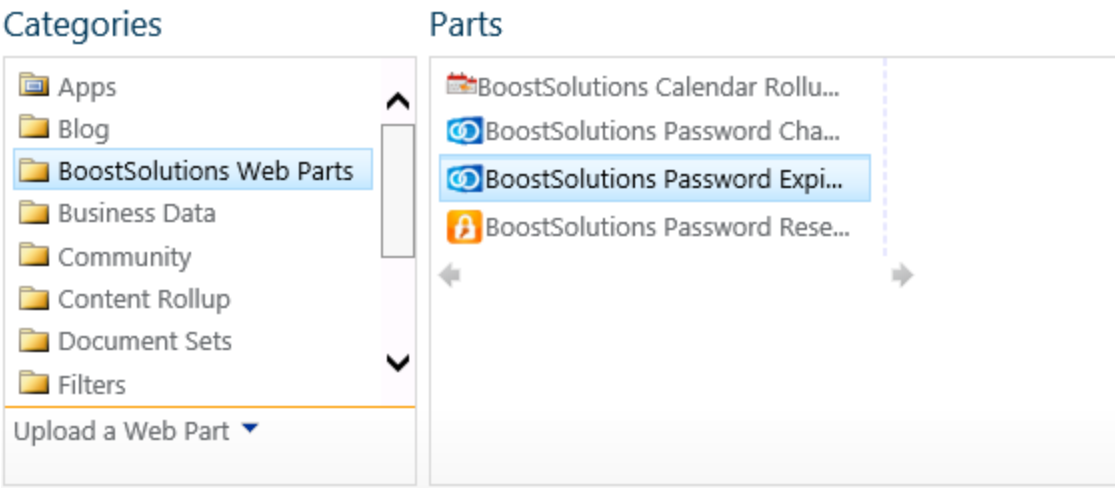
4.1 Add Password Expiration Warning Web Part

a. Enter a page or site which you want to add the Password Expiration Warning Web Part to, click **Edit** EDIT on the top right corner.

b. On the ribbon, click **Insert** under the **Editing Tools** tab, and then click **Web Part**.



c. Then in the **Categories**, click **BoostSolutions Web Parts**, select **BoostSolutions Password Change Expiration** from the web part list, and then click **Add**.



d. Click **Save** to save your operation and exit the edit page mode.

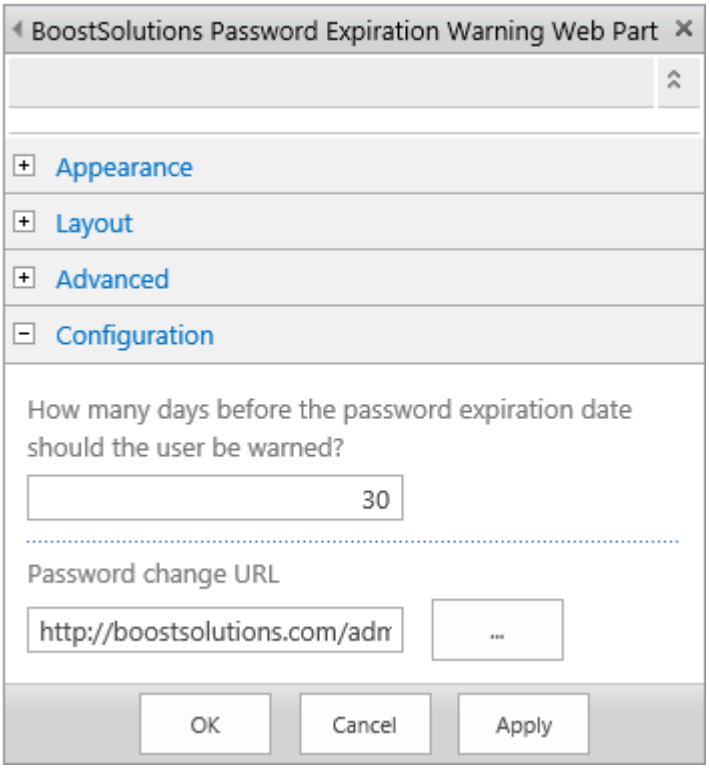
> ***Note***
>
> You must have **Customize Pages** permission to the current site to add and edit the Web Part.

4.2 Customize Password Expiration Warning Web Part

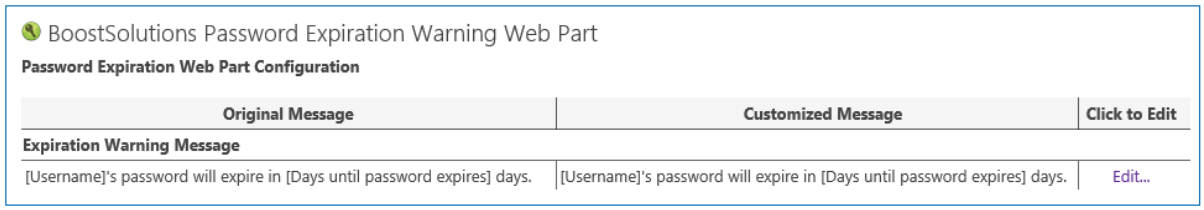
The SharePoint Password Expiration Warning Web Part can warn users with a message on the web page before your password expire, prompt them to change the password and provide a link that takes them to the password change page.

To edit it, click **Edit Web Part** on the Web Part drop-down menu.

Expand the **Configuration** category, you can set the number of days before the password expiration date to warn users and specify a password change URL to direct users the password change page. Click **Apply** and **OK** to save your settings.

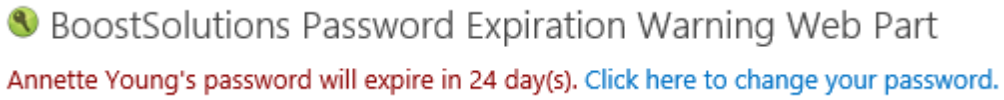


In Password Expiration Web Part Configuration section, you can edit the warning message.



Click **Edit** link, a **Edit Error Message** dialog will appear as following:

If the number of warning days before the password expiration date has been reached, the Web Part will display a warning message and a link <**User>'s password will expire in n day(s). Click here to change your password**.



Users can click on the link to go to the change password page to change their password before the expiration date.

5. Troubleshooting & Support

Troubleshooting FAQ:

https://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

Appendix: License Management

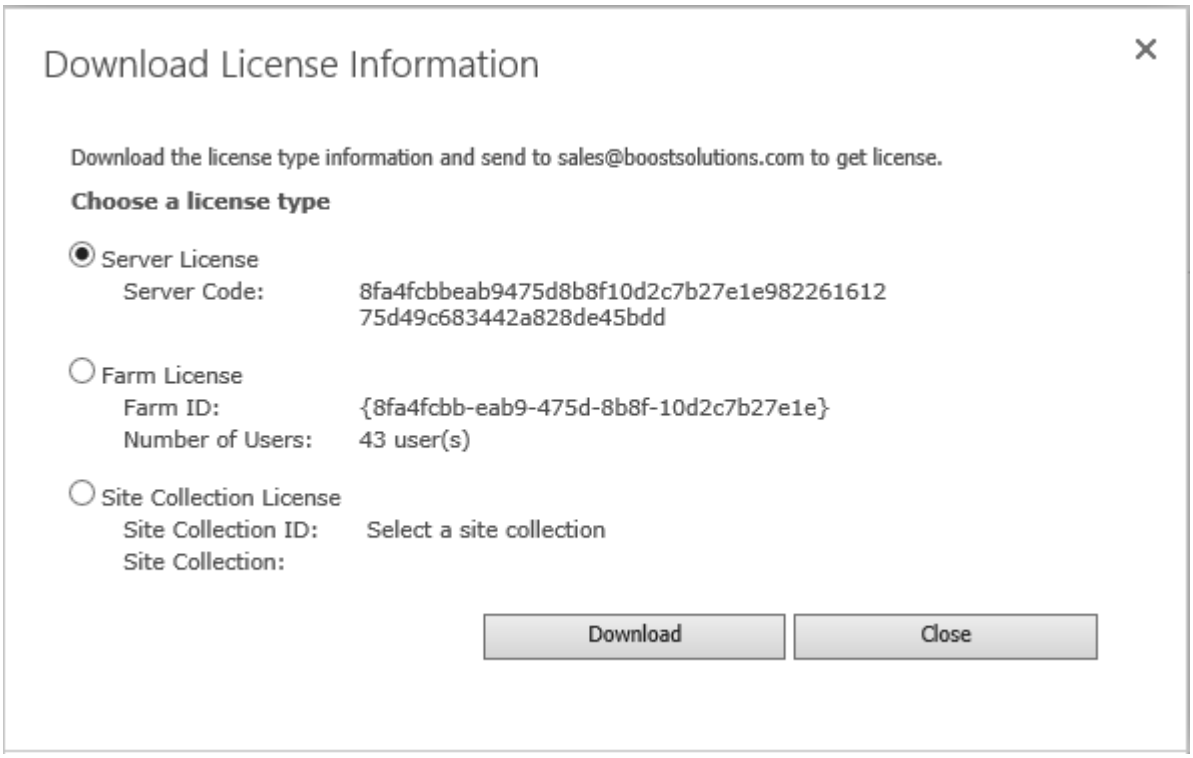
You can use SharePoint Password Change & Expiration without entering any license code for a period of 30 days from when you first use it.

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

Finding License Information

a. In the products main page, click the trial link and enter the License Management Center.

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



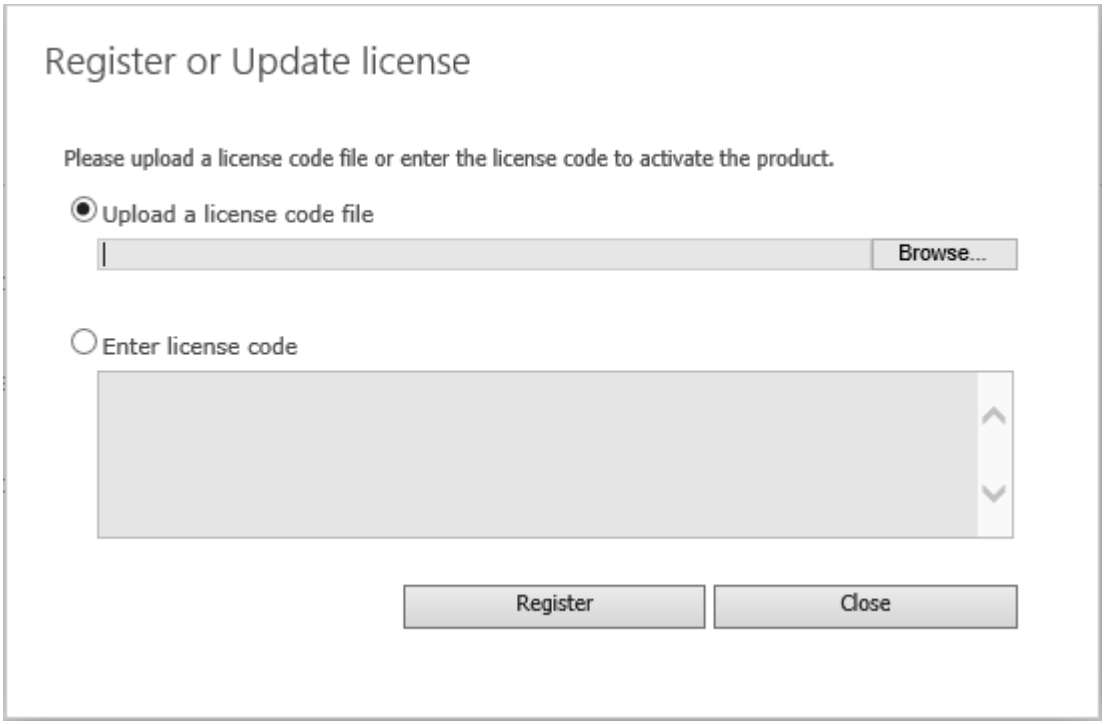
In order for BoostSolutions to create a license for you, you need to send us your SharePoint environment identifier. Note that different license types need different information. A server license needs a server code; a Farm license needs a farm ID; and a site collection license needs a site collection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

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

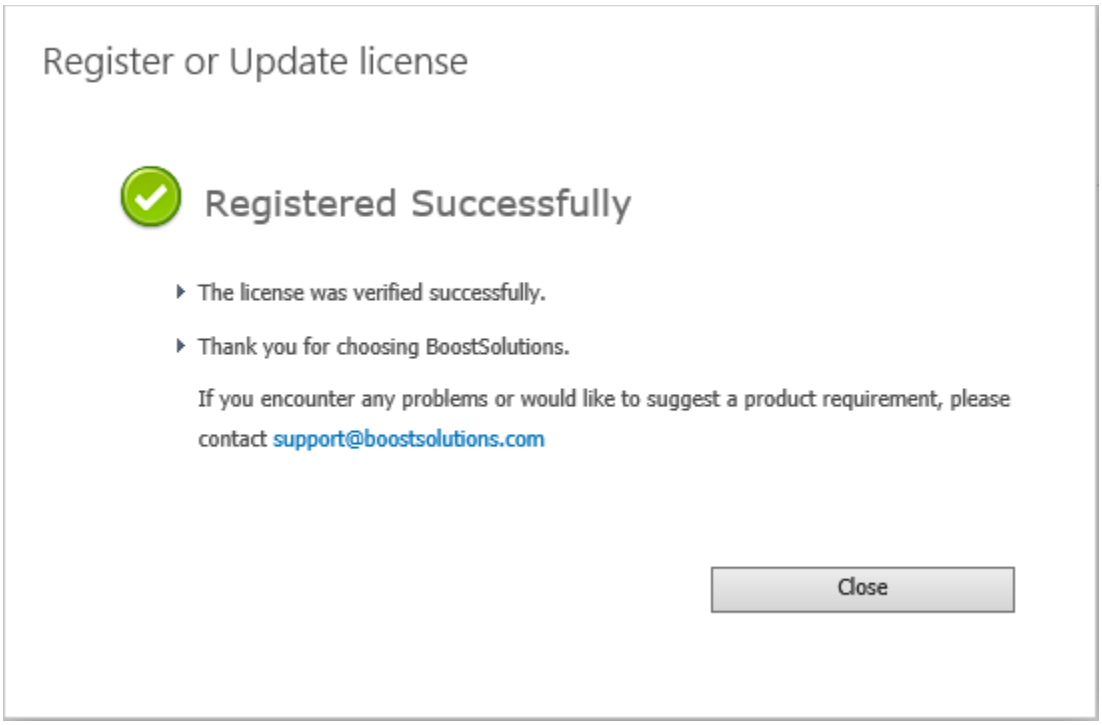
License Registration

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.



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



For more details on license management, see BoostSolutions Foundation.