Admin Guide

ManageEngine
ADSelfService plus

demo.adselfserviceplus.com

http://www.adselfserviceplus.com

Table of Contents

Welcome To ADSelfService Plus!

This guide offers you information on how to use ADSelfService Plus.

ADSelfService Plus:

ADSelfService Plus is a self-service application that allows its end-users to perform tasks which are conventionally carried out by the helpdesk officials.So you - as the administrator - get the following benefits by embracing this application:

- **Reduction in the workload of helpdesk officials**: Since end-users can self-service their needs, the workload on the helpdesk officials is immensely reduced.As a result, they would be able to concentrate on more important issues.
- **Full control over the application:** ADSelfService Plus is an entirely customizable application.That is,you have the right to choose the list of features - as well as modify their layouts - to suit your requirements.

Highlights:

- Self-Password Reset
- Self-Account Unlock

ADSelfService Plus allows its end-users to perform the 'password reset' & 'account unlock' operations on their own; thereby putting an end to the 'password reset issue' that has proved to be a nemesis for the helpdesk officials.

Click on Features Of ADSelfService Plus to take a look at 'what's in store' of this application.

Self-Service Features

ADSelfService Plus offers the end-users with four Self-Service features: Self-Password Reset, Self-Account Unlock, Change Password & Self-Update.

- **Self-Password Reset:** The highlight of this application which ensures that the helpdesk officials no longer attend to password reset calls.
- **Self-Account Unlock**: Allows the end-users to self-unlock their locked down accounts.
- **Multi-Platform Password Synchronizer**: Any password change happening through ADSelfService Plus can be synchronized with a wide range of cloud-based applications and non-Windows systems.
- **Change Password:** Grants end-users the permission to change their logon passwords.
- **Self-Update:** Allows the end-users to self-update their profile.
- **Mail Group Subscription**: Allow end-users to opt-in or opt-out of distribution groups on their own.

Other Add-On Features:

- **Employee Search:** Provides the end-users with the facility of performing quick search for fellow employees (along with Organizational Chart)
- **Password Notification:** Notify the end-users about their expiring passwords so that they can change it.
- **Mobile Password Management:** Let users manage their passwords 'on the go' using their mobile devices. ADSelService Plus has a native app for Android and iOS, and a Mobile WebApp for other mobile platforms.

The services offered by ADSelfService Plus can be split into two categories**:**

- **Enrollment Requiring Services**
- **Non-Enrollment Services**

Enrollment Requiring Services:

A user has to enroll with ADSelfService Plus in order to avail himself of the 'Self-Password Reset' & 'Self-Account Unlock' features.

Non-Enrollment Services:

These services do not require 'User Enrollment'.

The various services that fall under this category are:

- Change Password
- Self-Update
- Mail Group Subscription
- Employee Search
- Password Notification

Getting Started

The following sections describes how to get started with ADSelfService Plus.

- System Requirements
- Installing ADSelfService Plus
- Working with ADSelfService Plus
- Licensing of ADSelfService Plus

System Requirements for ADSelfService Plus

- Hardware Requirements
- Software Requirements

Hardware Requirements

Hardware	Recommended
Processor	P4 - 1.0 GHz
RAM	1 GB
Disk Space	2 GB

Software Requirements

Supported Platforms

ManageEngine ADSelfService Plus supports the following Microsoft Windows operating system versions:

- Windows 2000
- Windows XP
- Windows 2003
- Windows Vista
- Windows 2008
- Windows 2008 R2
- Windows 7
- Windows 2012
- Windows 2012 R2
- Windows 8

Supported Browsers

ManageEngine ADSelfService Plus requires one of the following browsers to be installed in the system for working with the client.

- Internet Explorer 7 and above
- Netscape 7.0 and above
- Firefox 4 and above
- Chrome 10 and above

Preferred screen resolution 1024 x 768 pixels or higher.

Installation

ManageEngine ADSelfService Plus can be installed on any machine in the domain, if the computer meets the desired system requirements for the installation of ADSelfService Plus.

To install ManageEngine ADSelfService Plus,

- Download the executable from the website http://www.adselfserviceplus.com.
- Click on the Downloaded file "ManageEngine_ADSelfService_Plus.exe"
- Follow the install shield wizard to complete the installation of ADSelfService Plus.

ADSelfService Plus can be run as:

- An Application
- A Windows Service

To run ADSelfService Plus as an Application

By Default ADSelfService Plus will be installed as an application, run the self-extracting EXE(ManageEngine_ADSelfService_Plus.exe) downloaded from the website and follow the wizard to completion. This will install the ADSelfService Plus application.

The application can be launched on a web browser by clicking on the Desktop Icon of ADSelfService Plus

ADSelfService Plus runs with the privileges of the user who has logged on to the computer .

To run ADSelfService Plus as a Windows Service

To run ADSelfService Plus as a service, install ADSelfService Plus as Service. To install ADSelfService Plus as Service.

- Go to Start Menu -->>All Programs
- Select "ADSelfService Plus"-->>"NT Service"
- Click on "Install ADSelfService Plus as Service"

Once the "ADSelfService Plus Service" is installed you can start the product as "Windows service".ADSelfService Plus runs with the privileges of the system account.

Working with ADSelfService Plus

- Starting ADSelfService Plus
- Launching ADSelfService Plus Client
- Accessing ADSelfService Plus from Winlogon Prompt
- Accessing ADSelfService Plus from Mobile Devices
- Stopping ADSelfService Plus

Starting ADSelfService Plus

ADSelfService Plus can be started either in the system account (when run as service) or in user account (when run as application).

When ADSelfService Plus is installed as a Service

- Option to install ADSelfService Plus as a service is available in the installation wizard.
- To start ADSelfService Plus in the system account, select Start --> Programs --> ADSelfService Plus--> Start ADSelfService Plus
- To start ADSelfService Plus in the user account, double-click the ADSelfService Plus desktop icon.

When ADSelfService Plus is not installed as a Service

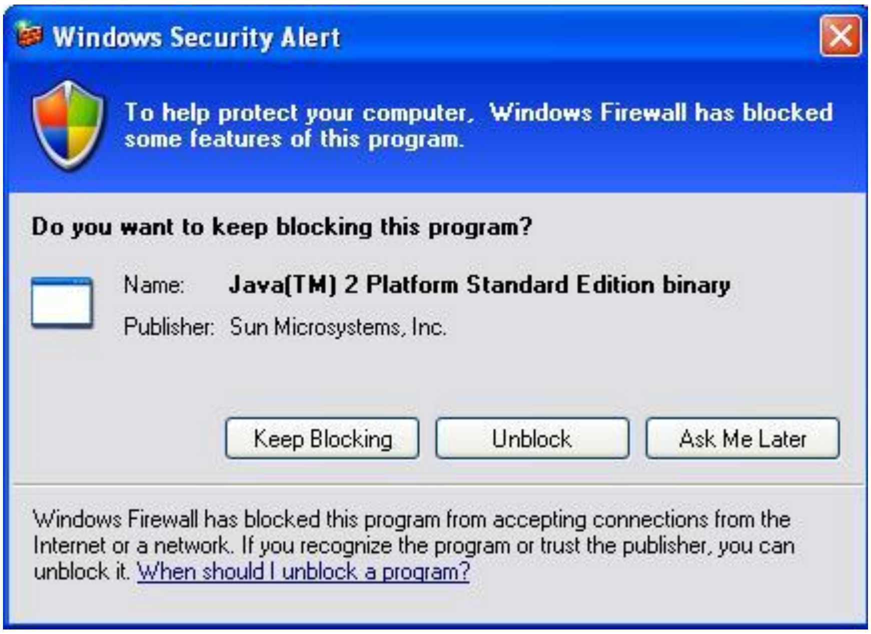
In this case, ADSelfService Plus can only be started in the user account. To start the product, select Start --> Programs --> ADSelfService Plus --> Start ADSelfService Plus

On starting the ADSelfService Plus, the client is automatically launched in the default browser.

When ADSelfService Plus is started in Windows XP / Windows 2003 machines with firewall enabled, Windows may pop up security alerts asking whether to block or unblock the following programs as shown in the images below:

  - Java(TM) 2 Platform Standard Edition binary - Java.

You should Unblock these programs to start ADSelfService Plus



Windows Security Alert
To help protect your computer, Windows Firewall has blocked some features of this program.
Do you want to keep blocking this program?
Name: Java(TM) 2 Platform Standard Edition binary
Publisher: Sun Microsystems, Inc.
Keep Blocking
Unblock
Ask Me Later
Windows Firewall has blocked this program from accepting connections from the Internet or a network. If you recognize the program or trust the publisher, you can unblock it. When should I unblock a program?

Fig: Java Alert

Launching ADSelfService Plus Client

To launch the ADSelfService Plus client, open a Web browser and type http://hostname:8888 in the address bar. Here the hostname refers to the DNS name of the machine where ADSelfService Plus is running.

Specify the user name and password as admin (for first time users) in the respective fields and click Login. If you have changed the password, you should use the changed password to login.

Accessing ADSelfService Plus from Winlogon Prompt

ADSelfService Plus provides end-users the facility to avail self-service password reset and account unlock right from the Windows logon screen of their machines. This helps the users to not depend on other users' machines in case they need to avail self-service. All you have to do is deploy the built-in GINA extension to the users' machines, which extends the Windows logon dialog screen with self-service functionality as shown in the image below.

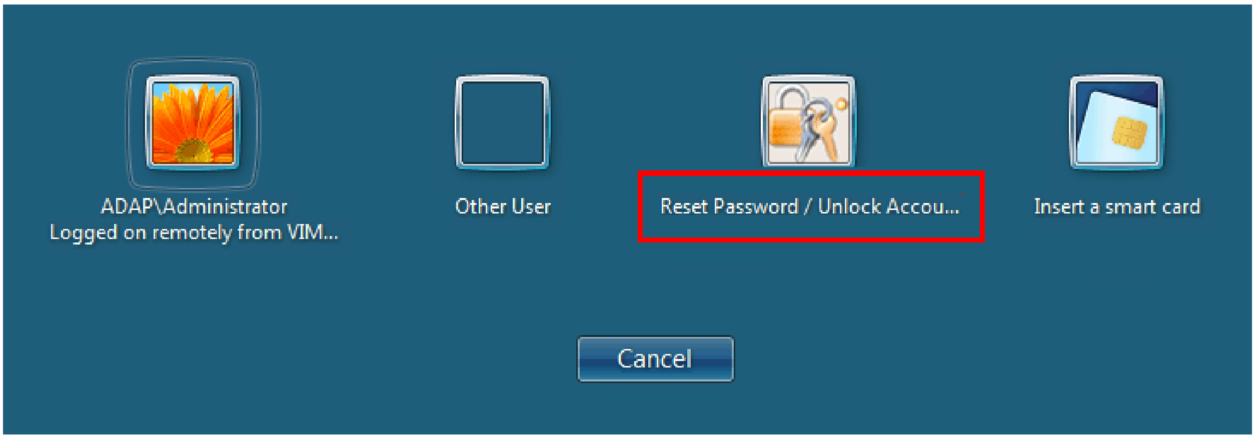

ADAP\Administrator
Logged on remotely from VIM...
Other User
Reset Password / Unlock Accou...
Insert a smart card
Cancel

Fig: ADSelfService Plus Credential Provider

For further info, refer GINA/CP Installation.

Accessing ADSelfService Plus from Mobile Devices

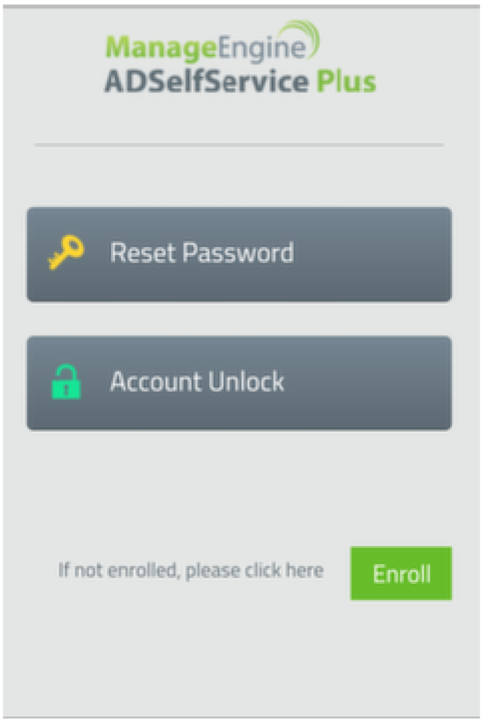
To make password self-service process much easier for end-users and to reduce dependencies of other users' computers and Windows logon clients, ADSelfService Plus has a **native app for iOS & Android** and a **Mobile WebApp** for other platforms such as Windows Mobile, etc.

You can download the iOS app from the **App Store** and the Android App from the **Play Store**.

The Mobile WebApp can be accessed from any mobile web browser. Here's how users can access ADSelfService Plus Mobile WebApp:

- Open a web browser from the mobile device.
- Type the URL of ADSelfService Plus portal.

  For eg: Enter **http://<hostname>:8888** in the address bar of the mobile browser. Here hostname refers to the machine from which ADSelfService Plus is running and 8888 denotes the port number.
- The following functionalities are supported by the mobile apps:
  - Reset Password
  - Unlock Account
  - Change Password
  - Enrollment



Stopping ADSelfService Plus

To stop ADSelfService Plus, select Start --> Programs --> ADSelfService Plus--> Stop ADSelfService Plus

Licensing

ADSelfService Plus is available in 3 editions - Free, Standard and Professional Editions.

The Free, Standard and Professional Edition, all come packaged as a single download. During the evaluation phase, the Professional Edition is installed and can be evaluated for 30 days. After 30 days, it is automatically converted to the Free Edition, unless the Standard or Professional Edition license is purchased.

For purchasing the license or any queries, please contact sales@manageengine.com.The license file will be sent through e-mail.

To upgrade from a Trial Edition or Free Edition to Standard or Professional Edition

1. Click the License link available in the top right corner of the ADSelfService Plus client. This opens the License details of the product.
2. Click the Upgrade Now link and select the license file received from ZOHO Corp using the Browse button.
3. Click Upgrade button to upgrade from Trial or Free Edition to Standard or Professional Edition.

Trial Version of ADSelfService Plus

- The Trial edition of ADSelfService Plus provides access to 50 users to be enrolled with ADSelfService Plus.
- The 50 users will be able to have complete functionality the trial version is valid for a period of 30 days after which it becomes a free edition.
- During the evaluation period ADSelfService Plus will provide mail and phone support.

Domain Configuration

Using the 'Domain Settings' feature,you can configure 'New Domains' as well as 'Revamp' various settings of the 'Existing Domain(s)'.

During startup,ADSelfService Plus adds all the domains that could be discovered.If you wish to 'add more domains' (or) incase of 'domains not being discovered',you would have to 'add them manually' with the help of this feature.

Steps To Be Followed Inorder 'To Add A Domain' Using The 'Domain Settings' Feature:

1 Click on the 'Domain Settings' tab (available on the top right corner of the application)

2 To add a 'New Domain',click on the 'Click here to add a new domain' button

3 The 'Add Domain Details' pop-up box appears on screen

4 In the 'Add Domain Details' pop-up box,you would have to specify the various 'Domain Details'

'Adding A Domain' is a three-step process:

1. Provide the 'Domain Name'
2. Specify the 'Domain Controller(s)'

   Adding Domain Controllers:

   To add 'Domain Controllers',click on the 'Discover' button which is available in the 'Add Domain Details' pop-up box.

   - Select the 'domain controller' from the list of available choices(which are discovered from the DNS)

   In case of 'Domain Controller not being found' ('Domain Controller(s) cannot be discovered.Please specify the Domain Controller(s) below' message will be displayed)

   - You would have to add the 'Domain Controller' manually (specify the 'Domain Controller Name' in the respective textbox provided)

   Click on 'ADD' to add the 'Domain Controller'.

3. Follow it up with the 'Domain Username & Password'
4. **Authentication:**

When a user is included in the 'Domain Admin' group,then he/she will be given the rights to 'Query the Active Directory' & 'Perform Various Self-Service Operations' in ADSelfService Plus.The users who are not included in the 'Domain Admin' group, require the following 'Permission(s)' to perform the corrosponding actions**.**

1 To perform the 'Reset Password' action,a user should have 'Reset Password' permission

2 To perform the 'Unlock Account' action, a user should have 'Read & Write LockOut time ' permission

3 To perform the 'Self Update' action, a user should have 'Read & Write' permission for the corresponding attributes

4 To install GINA client software,a user should belong to 'Domain Admin' group.

5 Click on 'ADD' to add the 'Newly Configured Domain'

Various Actions That Can Be Performed On The 'Configured Domains':

Make It Default Option:

Clicking on this option would make that particular domain as the 'Default Domain' in the Domain User Login Page(of the ADSelfService Plus application).

Edit Domain Details Option:

To 'Reconfigure the existing domain details',click on the 'Edit Domain Details Option'.You can bring about the changes through the 'Edit Domain Details' pop-up box (which appears on clicking the 'Edit' icon)

Update Domain Objects Option:

Clicking on this option would update the 'Domain Objects' of that particular domain.This 'Update Action' brings about synchronization between ADSelfService Plus & the Active Directory(in case of a lag existing between the two).

'Update Details Of XYZ Domain' dialog box would appear when you click on the 'Update Domain Objects' icon.

You can update the 'Domain Objects' with respect to the fields - present in the 'Update Domain Objects' pop-up box - that are mentioned below:

- Exchange Servers & Domain Policies
- Organizational Units(OUs)
- Groups
- Users
- Computers

Select the 'Desired Options' and click on 'OK'.The 'Domain Objects' would get updated.

Delete Domain Option:

To delete a 'domain from the available list',click on the 'Delete Domain Option' of that respective domain.

Other Attributes Of The Domain Settings Layout:

Domain Display Name:

This is the 'Name of the Domain' given by you for 'display purpose'.It has no connection to the 'Configured Domain Name'.It's sole purpose is to 'display the domain name' - on the User Logon Page - in a way which would be 'easy for the user to comprehend'.

Status:

This 'Status' feature sheds light on the 'Rights Associated with the Users of a Domain'.

A 'Success' status indicates that the Domain Users have the 'Admin' privilege.

'The User/System has no Admin Privilege' status would be displayed incase of 'Domain Users' not being granted with the 'Admin' rights.

Rolling out ADSelfService Plus

ADSelfServide Plus has a plethora of services to offer to its users.Of the many services that it has,the ones that hog the limelight are:

- Self-Service Options (Password Reset,Account Unlock,Self-Update & Change Password)
- Employee Search
- Password Expiry Notification
- Password Synchronizer
- Mail Group Subscription
- Self-Service Approval Workflow

This part of the guide deals with the mechanism involved in deploying the above mentioned features.

Deploying The Features: (General Info)

Self-Service Options: A very easy task.All you have to do is select the features that you want to provide to a particular domain (or OU).Give a name to this setting (policy) & save it.

Click on **Policy Configuration** for further details.

Employee Search: Enable the Employee Search feature (under the Configuration tab) to scout for fellow employees.

For more info,click on **Employee Search**

Password Expiry Notification: Select this feature (under the Configuration tab) to notify users about their expiring passwords.

For more info, click on **Password Expiry Notification**

Password Synchronizer: This feature, when enabled, automatically synchronizes Active Directory Password change/ reset of a user across several other platforms.

Click on **Password Synchronizer**for further details

Mail Group Subscription: Enable this feature to allow users to self-service their mail group subscriptions. Specify which groups are available to users for subscription and users who can subscribe/unsubscribe to them.

Click on **Mail Group Subscription**for further details

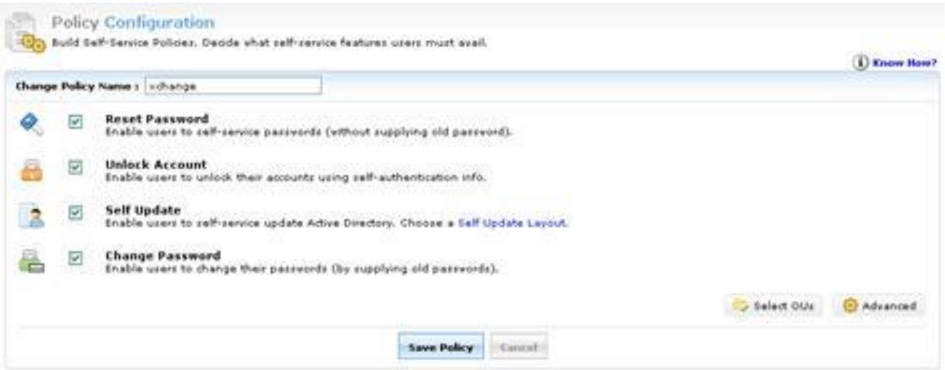
Self-Service Approval Workflow: Enable this feature to review and approve Self-Service actions before making changes to the Active Directory.

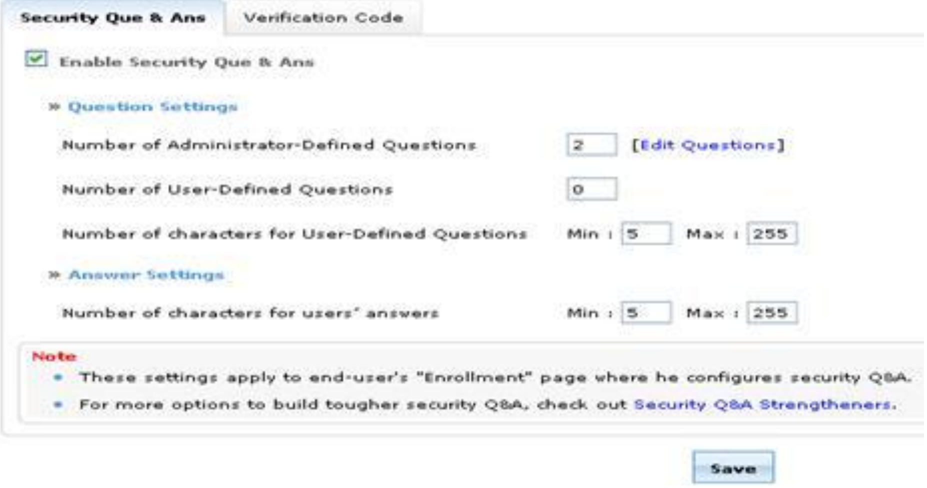
Click on **Self-Service Approval Workflow**for further details

Password Self-Service Deployment

Learn how to implement the Password Reset task onto end-users.

Requirements For Deploying The Password Self-Service Task:

1	Install & Register Your Domains	Click on " **Domain Configuration "** for further details.
2	**Self-Service Policy Configuration:** Tell ADSelfService Plus what self-service feature should be made available to a domain (or OU). Very simple! Just enable the feature you want to award to a domain (or OU), give a name to this setting (policy) and save it. That&rsquo;s it!	Click on Policy Configuration ' for further details.  Policy Configuration Build Self-Service Policies. Decide what self-service features users must avail. Know How? Change Policy Name : xchange ☑ **Reset Password** Enable users to self-service passwords (without supplying old password). ☑ **Unlock Account** Enable users to unlock their accounts using self-authentication info. ☑ **Self Update** Enable users to self-service update Active Directory. Choose a Self Update Layout. ☑ **Change Password** Enable users to change their passwords (by supplying old passwords). Select OUs Advanced Save Policy Cancel
3	**Configure Identity Verification Info and its depth** * Determine how users of this policy should authenticate themselves while	**For More Details:** Click on **'Identity Verification** '

	requesting for password self-service. Eg: Whether user should answer Security question, or enter verification code, or do both to establish identity. * Decide the depth of users&rsquo; authentication info Eg: Configure details such as the number of questions a user should answer, length of the answer, etc.	 Security Que & Ans | Verification Code ☑ Enable Security Que & Ans » Question Settings Number of Administrator-Defined Questions: 2 [Edit Questions] Number of User-Defined Questions: 0 Number of characters for User-Defined Questions: Min : 5 Max : 255 » Answer Settings Number of characters for users' answers: Min : 5 Max : 255 Note • These settings apply to end-user's "Enrollment" page where he configures security Q&A. • For more options to build tougher security Q&A, check out Security Q&A Strengtheners. Save **Note**: This setting will be applied uniformly to the entire domain or OU as covered by the self-service policy. You can set separate Identity Verification settings for every self-service policy you create.
4	**Password Reset Modality:** Determine the mode through which users of a selected domain or OU should reset their passwords.	ADSelfService Plus offers 3 modes. • Via A Web Portal • Gina/CP • Gina Free Click on Password Reset Modality for further details.
5	**Configure AD Self Update portal:** If you had enabled &ldquo;Self Update&rdquo; for a domain or OU, then it would do good to choose a layout through	**Configuring a "Self Update" layout** Why a customized layout is better than the default? What is the advantage of a customized layout? The layout that we provide is very basic. On the other hand, when you customize it, you have the full potential to make the user update directory info just as you desired! For more details follow the link "**Configuring Self Update Layout".**

	which users can update their information. If you don&rsquo;t choose, the default layout would be assigned.	
6	**Post-Installation Security Settings** Make use of the security settings offered by ADSelfService Plus and reinforce your password self-service implementation against any threats.	Click on " **Security Settings "** for further details
7	**Publish ADSelfService Plus Web Port** Make ADSelfService Plus accessible to the end-users.	The url would follow the naming pattern mentioned below: **http://servername:port**
8	**Enrollment Invitation & Product Adoption** Now, tell the users about ADSelfService Plus. Send a mail right from ADSelfService Plus! Ask them to enroll for password self-service. Or rather MAKE them enroll! Check out your options on the right!	Enrollment Notification Auto Enrollment External Data Source Enrollment Reminder Click on Enrollment & Invitation for further details

Policy Configuration

ADSelfService Plus offers 4 self-service functions to domain users: ability to self reset passwords, self unlock account, self update information into Active Directory and change password. As an administrator, you can decide whether users of a domain or selected organizations unit(s) (OU) will avail themselves of any or all of these functions. In other words, you set a "self-service policy" for the users and define the extent they can use ADSelfService Plus.

The "Policy Configuration" tab provides all the functionalities for you to define/edit/delete policies. ADSelfService Plus allows you to define any number of "self-service policies" in a given domain, provided there is no OU duplication in the policies; that is, an OU which is already a part of a policy cannot be subjected to another policy.

By default, ADSelfService Plus sets a policy for the entire domain, when it discovers DCs of a domain. Thus when you log in for the first time (as an administrator) this default policy will be shown to you. Conventionally, every self-service feature is selected. If it fits your requirement, you can retain it; else, you can edit it.

Click on `**Steps To Create A Policy** ’ for further details.

Identity Verification

ADSelfService Plus screens for privileged users (aka enrolled users) via an authentication method by name Identity Verification.

Privileged users of this application have the rights to perform the self-password reset & self-account unlock operations.

Identity Verification has four modes:

- Security Ques & Ans
- Verification Code
- Google Authenticator

Security Ques & Ans: Authenticate users by forcing them to answer to a set of security questions.
Verification Code: Authenticate users by forcing them to reproduce a code sent by ADSelfService Plus or by sending them a secure password reset/unlock account link.

You can send the Verification Code to:

- E-mail address of the user
- Mobile number of the user

You can send the secure password reset/unlock account link to:

- E-mail address of the user

Google Authenticator: Authenticate users by forcing them to enter the security token generated by the user's Google Authenticator app.

Choose the option that suits your requirement.

Note:

I You are provided with the rights to configure any combination of Identity Verification modes simultaneously.
II The details that a user provides via Security Ques & Ans should match his/her enrollment information, only then he/she would be granted the rights to access the privilege services.

Click on **'Steps Involved In Configuring Identity Verification'** for further details.

Enrollment:

For a user to avail the Self-reset password or self-unlock account features, users have to be enrolled with ADSelfService Plus.

Why should I Enroll?

When a user enrolls with ADSelfService Plus, the information provided by the user is used to **authenticate** them when they use the features Self-reset password and self-unlock account. Trusting end users with the power to reset their password or unlock their accounts carries a certain amount of risk. Security becomes paramount and keeping that in mind, ADSelfService Plus uses **Security Questions, Mail/SMS Verification code/secure link** and **Google Authenticator** to verify the identity of users.

Ways to Enroll:

ADSelfService Plus strives to make the enrollment process easy by offering many ways to enroll. Administrators can enroll users or make them enroll themselves. Each method is useful in tackling a set of possible scenarios. Depending on your needs, you could choose the option that best fits the bill.

- Enrollment by Users
- Enrollment without user's intervention

Enrollment by Users:

When your organization has no data pertaining to enrollment, the administrator could make the users enroll themselves.

Administrators can choose to either notify users to enroll or force them to enroll with ADSelfService Plus.

Enrollment Notification:

When you have just deployed ADSelfService Plus in your organization, the administrator could select this method to let all employees know of the deployment. This option, when enabled, sends a **notification mail** to all users who have not yet enrolled to ADSelfService Plus.

The notification mail can be sent to non-enrolled users automatically via a **scheduler**. The scheduler can be run at different frequencies like once in a month, once in a week, daily or even hourly! When the scheduler runs, it searches for all the non-enrolled employees and newly added employees within the selected domain/policy and sends a notification mail to all these users urging them to enroll with ADSelfService Plus.

Click on **Enrollment Notification** for further details.

Force Enrollment:

Force Enrollment searches for all non-enrolled users within the selected domain/policies and associates their accounts with a **Logon Script**. The logon script forces them to enroll before starting their work when they log in to their machines which are connected to the domain.

Linking non-enrolled users' account with a logon script can be done using a scheduler. The scheduler can be tasked to run periodically to check for non-enrolled and newly added users and set up the logon script to their accounts.

When Force Enrollment is in effect, the administrator can enable **"Single Sign-On"** for users. Enabling SSO will automatically sign in the user to ADSelfService Plus when they click on "Enroll" in the logon script. Click on Single Sign-On to know how to enable SSO.

Note: If your organization already has a logon script running, the force enrollment logon script can easily be configured to run along with the existing logon script.

For step-by-step instructions on how to enable Force Enrollment for non-enrolled users, click **here**.

Enrollment without Users' Intervention

Let us look at the options that allow the administrator to enroll users without their intervention.

Auto Enrollment:

Auto Enrollment option could be used when your organization has previously deployed a self-service password reset program. The Administrator could import the existing security questions and answers along with the user's Mobile number and Email ID that are stored in a CSV file format. The imported Security Questions and Answers, E-Mail ID and Mobile numbers are used to enroll the user.

There in an alternate way to enroll users using the Mobile number and E-Mail ID attributes from the Active Directory. You can specify the AD attributes of Mobile numbers and E-Mail ID from which the data has to be fetched. The data that has been fetched from the Active Directory cannot be edited by the users. So, the admin does not have to worry about the user modifying the values. When ADSelfService Plus is deployed, this option can be used to quickly enroll all users within a matter of minutes. It does not needlessly trouble the user with notifications to enroll.

Click **here** for further details.

External data Sources:

This option of ADSelfService Plus can be used to connect your in-house data sources like Oracle, MS SQL and MY SQL with ADSelfService Plus.

If your organization has an external database that has enrollment data stored in it, a connection has to be set up between ADSelfService Plus and the database. When the connection has been set up and ADSelfService Plus has been given sufficient permission to access the database server, data can be fetched and users can be enrolled.

Also, any changes made on the database server like bulk user additions can be easily updated to ADSelfService Plus with just a click using the "Fetch Again" option!

Note: A scheduler can also be run that will regularly search for newly added users in the connected external data sources and enrolls them with ADSelfService Plus. The scheduler can be configured to search for new additions in the data sources at different frequencies as required.

For instructions on how to connect and fetch data from an external data source, click **here**.

Security Settings: (Features Under Advance Tab)

Once you configure a policy, the next step would be to secure the user accounts of that policy by enforcing the security features available under the Advanced tab(available to you on successfully completing the Policy Configuration process)

Under the Advance tab, you are provided with the following options using which you can enhance the security of the end-user account.

- Block User
- Reset & Unlock
- Question & Answer Settings
- Enrollment
- Notification
- General
- Automation

Click on **Advanced Policy Configuration Options** for further details.

For more details on Security Options in ADSelfService Plus - Check the Security Center.

Taking The Features To The End-Users

Preparing The Features:

This is a part of the policy configuration process - preparing the features that you desire to implement onto the end-users.

Since ADSelfService Plus is an entirely customizable application,you have the choice of selecting the features from the 'default list' that

ADSelfService Plus has to offer.

By default,ADSelfService Plus provides you with the following features:

- Password Reset / Account Unlock
- Self-Update
- Change Password

You have the choice of selecting all the above mentioned features (or) can go for specific feature selection.

Feature Selection:

A very simple task! All you have to do is enable the feature that you wish to provide to the end-users while carrying out the Policy Configuration process**.**

Methodology Involved In Preparing The Features:

Click on Password Reset/Account Unlock for further details

Click on Self-Update for further details

Click on Change Password for further details.

Implementing Password Reset/ Account Unlock process

The privilege services – Password Reset & Account Unlock – of ADSelfService Plus can be implemented onto the end-users in the following ways:

- Via a Web Portal
- Via Gina/CP
- Via Gina Free

Via A Web Portal:

Allow users to perform the password reset/account unlock operation by accessing ADSelfService Plus via a web portal.

Via Gina/CP:

Let the users to perform password reset/account unlock operation by accessing ADSelfService from the logon prompt of their respective systems.

Requisite: Installation of Gina/CP on the user machines.

For further info, click on Gina/CP Installation

Via Gina Free:

Similar to Gina/CP method, that is, lets user to perform password reset/account unlock operation from their respective systems. Unlike Gina/CP, this method does not require Gina installation onto the user systems.

For further info click on Gina Free.

Password Reset / Account Unlock Task:

For all the above mentioned methods, the methodology involved in performing 'password reset/account unlock' task is the same - that is - Identity Verification.

Click on Identity Verification for further details.

Note:
Once the user logs into ADSelfService Plus, he can reset password (or) unlock his account by clicking on the respective button & responding to a series of steps laid down by ADSelfService Plus.

Implementing Self-Update Feature

Imposing the Self-Update feature onto the end-users can be done as follows:

To begin with, you would have to select the Self-Update option while performing Policy Configuration.
As aforementioned, ADSelfService Plus lets you to customize its features.

Customizing Self-Update:

Decide the fields that you wish to provide to the users. Select them & save the new self-update layout.

Highlights:

- Lets you configure new fields as per your specifications
- Allows you to declare important fields (like address, phone no) as mandatory for users
- Facilitates easy updation of data for users by allowing you to configure drop-down boxes, check boxes & radio buttons
- Assists you in setting up help cards - for better understanding of user – beside substantial fields

Click on Steps to configure Self-Update for further details.

Implementing Change Password Feature

Enforcing the Change Password feature onto the users can be done as follows:

- Select the Change Password option while performing the Policy Configuration process.
- By doing so, you provide users - of the specified policy – the rights to change their logon passwords whenever desired.
- Finally, click on Save to store the configured policy.

Employee Search Deployment

Learn how to implement the employee search feature onto the end-users.

Steps Involved: (At A Glance)

- **Domain Selection:** Select the domains (or OUs) on which this feature is to be implemented.
- **Search Specifications:** Specify what exactly you are searching for.

Available Options:

- Users (To search for Users)
- Contacts (To search for Contacts)
- Groups (To search for Groups)

Enable the options that you desire.

> You have the right to select all three options simultaneously.

- **Refining The Search Process:** Select the elements which will aid the user to narrow down the scope of the search operation.

  Example: "Full Name", "E-mail address" & "Telephone Number" of a user
- **Configuring The Layout:** Decide the fields that would appear when the user carries out the search operation.

Click on Steps to Configure Employee Search for further details.

Password Notification Deployment

Learn how to deploy the "password notification" feature onto the end-users.

Steps Involved: (At A Glance)

- **Domain Selection:** Select the domains (or OUs) on which this feature is to be implemented.
- **Specify Supplementary Features like**
    - Notification Frequency
    - Scheduling Time For Sending Notifications
    - Receiving Status Mails Concerning &lsquo;Delivery Of Notifications To Users&rsquo;
    - Mail Server Configuration (for receiving Status Mails)

Configure the feature as per your requirements & save it.

Click on Steps Involved In Configuring Password Notifications for further details

Password Synchronizer Deployment

This feature offers the users the benefit of having a single password across all platforms.

Learn how to Synchronize Passwords across several other platforms.

Steps Involved: (At A Glance)

- ADSelfService Plus supports a wide range of cloud-based and on-premise applications for password Synchronization.
- Select the application with which you want to synchronize your Active Directory Password Change/Reset
- Fill in the required fields and select the policies to which you want the synchronization to happen

Each application has different set of options to be configured for password synchronization.

To learn more on the different steps for different applications, click on steps to configure Password Synchronizer for further details.

Mail Group Subscription Deployment

Learn how to implement Mail Group Subscriptions to end users.

Steps Involved: (At A Glance)

- **Name**: Provide a name and Description for your Mail Group Subscription.
- **Domain Selection:** Select the domain on which the feature is to be implemented.
- **Select mail Groups**:Select the mail groups that you wish to be available for subscription.
- **Select Users**: Select the users who can self-service their Mail Group Subscriptions.

  Available Options:

  Users: Add users individually

  OUs: Add users in particular OU's (With the option "Don't inherit child OUs")

To learn more, click on steps to configure Mail Group Subscription for further details.

Self-Service Approval Workflow Deployment

This feature integrates ADSelfService Plus with a workflow provider and helps you review and approve Self-Service actions done by the end-users.

Steps Involved: (At A Glance)

- Check the box against Enable Approval Workflow to enable this feature
- Download and install a workflow provider like ADManager Plus
- Select the policies to which you want the approval workflow to be enabled

To learn more, click on steps to configure Self-Service Approval Workflow for further details.

Know Your Product

Yhis section helps you to get acquainted with various features that ADSelfService Plus has to offer.

It do so by providing you with answers to the following questions:

- What are the features of this application?
- How can they be implemented?
- What are your rights as an administrator?
- How can you ensure the safety of user accounts?
- And many more.......

'Know Your Product' comprises of the following features:

- Dashboard
- Reports
- Configuration
- Admin
- Support

Dashboard

This presents an overview of "what ADSelfService Plus application is all about". It highlights each & every important aspect of this application

The dashboard comprises of the following features:

Reports:

The dashboard is replenished with new set of reports at regular intervals.These reports provide a comprehensive study of user actions within the ADSelfService Plus application.

The Reports listed under the Dashboard are:

- User Reports
- Enrollment Reports
- Audit Reports

User Reports:

These are reports that focus on the 'status of the user account'.It puts light on the issue of 'Account Lockout' & 'Password Expiry'.

The various reports available under this category are:

- Locked Out Users Report
- Soon-to-expire User Password Report
- Password Expired Users Report

Enrollment Reports:

As the name suggests,these reports - besides providing information on the enrolled users - focus on the various features that accompany the 'Enrollment' process of this application.

It lists the following reports:

- Non-Enrolled Users Report
- Enrolled Users Report

Audit Reports:

The Audit reports provide an account of the 'user actions within this application' which serve for the auditing purpose.

The reports listed under this category are:

- Reset Password Audit Report
- Unlock Account Audit Report
- Self-Update Audit Report
- Failed Attempts At Security Questions Report
- Change Password Audit Report

Click on '**Reports**' for further details.

Highlights Of The ADSelfService Plus Application:

Besides providing you with "reports", the dashboard offers you with 'links to the services' that this application has to offer.

The dashboard provides you with links to the following features:

- Self-Service Features (Password Reset, Account Unlock, Self-Update & Change Password)
- Identity Verification (User Authentication Process)
- Add On Features (Employee Search & Password Expiry Notification)
- Gina (Installation, Customization & Scheduling)

Dashboard provides you with information on all the domains that are configured in the ADSelfService Plus application.

Reports

The ADSelfService Plus feature generates several reports all of which are placed under the "Reports" tab.

These reports are classified into three different categories:

- User Reports
- Audit Reports
- Enrollment Reports

User Reports

These are reports that focus on the 'User Details' that provide you with information on the 'Status of the User's Password & Account'.Issues like 'Locked Out Accounts','Password Expired Accounts' are brought into light under these reports. The ultimate goal of these reports is to allow the users to successfully carry out the Self Password Reset & Self Account Unlock operations.

- Types Of User Reports.
- User Reports Generation.
- Other Available Options.

Types Of User Reports:

1. Locked Out Users.
2. Soon-To-Expire User Passwords
3. Password Expired Users.

I Locked-Out Users:

This report provides a survey of those users who failed to logon owing to typing incorrect passwords.A user's account gets locked out when he/she exceeds the "threshold set for incorrect logins" based on the domain policy. This report helps you to identify such 'Locked Out Users'.

II Soon-To-Expire User Passwords:

"Soon-To-Expire User Passwords" report puts light on the list of users whose passwords are "about to expire" in a few days. This report helps you to take "proactive measures" while dealing with the "expiry of the user's password" issue.

III Password-Expired Users:

A user's password expires after a certain period of time due to the regulations imposed by the 'Domain Policy' onto the user's 'password settings' process. This report contains the list of such password expired users.

User Reports Generation:

1. Select "Reports" tab (Reports --> User Reports)
2. Select the "Desired Domain" from the drop down box
3. For "OU" based selection, click on "ADD OUs" link (Select the "Desired OUs" & click "ok")
4. In the case of 'Soon -To-Expire User Password' reports, specify the "Number of Days" in which the 'User's Password is Going to Expire'
5. Click on "Generate" button.

The 'Specified List of Users' would be generated.

You can re-frame the **Report Layout Template** - By clicking on **Add/Remove Columns** link (to add or remove columns)

Other Available Options:

- Quick Search.
- Export & Printable.

Quick Search:

As the name suggests,this option is used to perform 'Quick Search' for users (by using their names) instead of executing the tedious task of going through the entire user list.

Export & Printable:

Using this 'Export' option, you can export the 'list of users in bulk' in various formats like 'CSV,HTML,PDF & XLS'.This process is usually carried out for auditing purposes,while the 'Printable' option is used to view the printable version of the 'list of users'.

Enrollment Reports

These are reports that are concerned with the 'Enrollment of the Users'.The 'Enrollment Reports' are classified into three different categories. These reports help you to bring about 'effective enrollment of end-users' by providing you with information about the 'non-enrolled users'

- Types Of Enrollment Reports.
- Enrollment Report Generation.
- Other Available Options.

Types Of Enrollment Reports:

1. Enrolled Users Report.
2. Non-Enrolled Users Report.
3. Licensed Users Report.
4. Security Ques & Ans Report.

I Enrolled Users Report:

This report provides you with the list of users who have enrolled themselves by undertaking the 'Identity Verification' process (Security Q & A (or) Authentication via E-mail/SMS).The 'Enrolled Users' are provided with the rights to the 'Reset/Unlock' self-service feature.

II Non-Enrolled Users Report:

The Non-Enrolled Users&rsquo; report highlights the list of users who are yet to enroll with the ADSelfService Plus application (users who have not undertaken the 'Identity Verification' feature).These users are not provided with the rights to the 'Reset/Unlock' self-service feature.

III Licensed Users Report:

This report lists the users who have been allotted with the licenses provided by the ADSelfService Plus application. The information provided by this report is helpful for the 'effective management of the users licenses'.

This report keeps track of the 'Licenses-In-Use' in the form of the 'License Count Feature'.It provides various statistics - regarding license - like the 'Total,Used & Free' licenses.

Users who are taken into consideration for the 'License Count' feature are 'Enrolled Users','Non-Enrolled Users'(users who have logged into the application but are yet to enroll) & the 'Technicians'

It also provides you with the option of 'Deleting Users'(who no longer are in need of the license) from the 'Licensed Users List'.This process is accomplished by generating the 'Inactive Users List' & 'deleting their licenses' with the help of the 'Restrict Users' feature.

You can also 'Filter Out The List Of Licensed Users'(Enrolled/Non-Enrolled/Technician) using the 'Filter' option.

IV Security Ques & Ans Report:

This report generates the list of enrolled users along with their respective security question(s) & answer(s).It helps you to keep track of the details provided by the users via the 'security que & ans' process.

The information provided by these reports serve for assisting the helpdesk officials and also for auditing purposes.

Enrollment Report Generation:

1. Select the "Reports" tab (Reports --> Enrollment Reports)
2. Select the "Domain" from the drop down box
3. For "OU" based selection, click on "ADD OUs" link (Select the "Desired OUs" & click "ok")
4. Click on "Generate" button.

The "Specified List Of Users" would be generated

Other Available Options:

- Quick Search
- Export & Printable

Quick Search:

As the name suggests,this option is used to perform 'Quick Search' for users (by using their names) instead of executing the tedious task of going through the entire user list.

Export & Printable:

Using this 'Export' option, you can export the 'list of users in bulk' in various formats like 'CSV,HTML,PDF & XLS'.This process is usually carried out for auditing purposes,while the 'Printable' option is used to view the printable version of the 'list of users'.

Audit Reports

Under this tab,you would find a plethora of reports that centralize on the 'Self-Service operations carried out by the end-users'.

Besides auditing the self-service operations,these reports provide you with an account of various 'Notification Deliveries' & the 'Security Que & Ans' process.

It lists the following reports:

1. Self-Service Audit Reports.
2. Notification Delivery Reports.
3. Failed Attempts At Security Questions Report.
4. Audit Report Generation.

Self-Service Audit Reports:

As the name suggests,these are reports that generate the list of users who availed themselves of the 'self-service features'(Reset Password,Account Unlock,Self-Update & Change Password) over a specified period of time.

Notification Delivery Reports

These reports focus on the 'Delivery Status' of the various notifications that this application has to offer.

The notifications offered by this application are:

- Enrollment Notification
- Password Expiry Notification
- Notifications Sent On Execution Of Self-Service Operations

As mentioned earlier,you have to specify the time period for generating these Notification Delivery reports.

Failed Attempts At Security Questions Report:

This report provides you with the account of the 'number of unsuccessful attempts' produced by the end-users while undertaking the 'Security Que & Ans' process.Again,you would have to specify the time period for generating these reports.

Audit Report Generation:

1. Select the 'Reports' tab (Reports --> Audit Reports)
2. Specify the 'Start Date'
3. Follow it up with the End Date'
4. Click on 'Generate'

Configuration

The 'Configuration' tab allows you to configure the various services - of the ADSelfService Plus application - that you wish to provide to the end-users.

The Configuration tab is further classified into three different fields:

- Self-Service
- Administrative Tools &
- Security Center

Self-Service

Self Service Configuration

The "Self-Service" section of allows an administrator to configure all features that ADSelfService Plus has to offer. This includes

1. Self Service features delegated to end-users like Password Reset, Account Unlock, Self Update Active Directory and Change Password.
2. Email Notification features that allow administrators to alert users of Password Expiry.
3. Employee Search capabilities.

The below links provide detailed walk-through on how to configure various features that ADSelfService Plus has to offer.

1. Configuring Self Service Policies
    - Configuring Identity verification techniques.
        - Security Questions and Answers.
        - Email and SMS Verification codes.
2. Configuring Password Expiry Notification.
3. Configuring Employee Search.

Policy Configuration

Policy Configuration for Self-Service Features

ADSelfService Plus offers 4 self-service features to domain users:

1. Self Reset Passwords.
2. Self Unlock Accounts.
3. Update Personal Info / Self Update of AD Accounts.
4. Change Passwords.

As an administrator, you can decide whether users of a domain or selected organizations unit(s) (OU) will avail themselves of any or all of these functions. In other words, you set a "self-service policy" for the users and define the extent they can use ADSelfService Plus.

The "Policy Configuration" section provides all the functionalities for you to define/edit/delete policies.

To Configure a Self Service Policy

By default, ADSelfService Plus sets a policy for the entire domain, when it discovers DCs of a domain. Thus when you log in for the first time (as an administrator) this default policy will be shown to you. Conventionally, every self-service feature is selected. If it fits your requirement, you can retain it; else, you can edit it. Furthermore, you can configure the 4 self-service features too.

1. Click on the "Configuration" Tab.
2. Enter a Policy Name in the Text box provided.
3. Provide a check against one or all self service features that you wish to delegate to users.
    - Reset Password
    - Unlock Account
    - Self Update (Change the default layout)
    - Change Password
4. Click on "Select OUs" button.

5. This will "Pop-up" the list of all OUs in the configured Domains in a "Tree View" or "List View".
6. Select "Domain" from the dropdown this will list OUs in the selected Domain.
7. Provide a check against one or all OUs to select OUs for policy application.
8. Click on "OK" button.
9. Click on "Save" button this will save the configured settings.

This will allow users in the selected OUs to enjoy the Self Service features that are checked in the policy.

> ADSelfService Plus allows you to define any number of "self-service policies" in a given domain, provided there is no OU duplication in the policies.(i.e an OU which is already a part of a policy cannot be subjected to another policy).

Identity Verification

Multi-factor Authentication:

The multi-factor authentication options provided by ADSelfService Plus allows you to determine what and how end-users' authentication info (used to reset password or unlock account) should be.

1. The multi-factor authentication techniques can be configured from the "**Configuration**" Tab of ADSelfService Plus
2. Choose the Policy from the drop down.
3. You have three tabs to choose from to configure multi-factor authentication techniques for your End-Users.
   - Security Question & Answers.
   - Verification Code.
   - Google Authenticator.

   By default, end-users will have the option to prove their identity by any one of the multi-factor authentication methods, even if all the methods are enabled by the administrator. You can also force users to prove their identity via certain verification methods. See Advanced Settings for more information.

   To force users to prove their identity via selected authentication methods

   - Under Multi-factor Authentication, click **Advanced**
   - Under the **Enrollment tab**, you will have an option to **'Enforce and reorder the multi-factor authentication options'**
   - Now select the verification methods that you want to enforce during identity verification and reorder them by dragging them around. You can force any one or two or any combination of the multi-factor authentication options during identity verification.
   - Click **OK** to save the settings

It is essential to select at-least one of the three multi-factor authentication options
for configuring the Identity Verification process.

Configuring Security Question and Answers

To Configure Security Question and Answers for identity verification follow the steps provided below. This page also provides information on various options ADSelfService Plus provides for for an administrator to configure while security questions and answers are defined.

1. Click on "Configuration" Tab -->>"Multi-factor Authentication" (from the "Self-Service" section)
2. Check the "Enable Security Q & A" option (for enabling "Security Q & A" feature)
3. The "Question & Answer Settings" would get enabled

The "Question Settings" will allow you to define the following:

- Number of Administrator-Defined Questions
- Number of user-defined questions
- Number of characters for user-defined questions

The "Answer Settings" will allow you to define the following:

- Number of characters for answers

Number of Administrator-defined questions:

These are the questions that you, as an administrator, wish to ask the user during the Identity Verification Process .

- Enter the number of questions you desire to force on the users in the text box.
- Click the link "Edit Questions" beside the text box to define a new question or edit an existing one.
  - Adding a question: In this pop-up, just besides "Add a new question", you will find a text box. Type in the question that you want to ask the user and then click the button "Add".
  - Once you are done with this, your question will be listed below.
  - Modifying/deleting an existing question
    - Click the edit ✎ icon to edit a question - You can modify an existing question or create a new question of your own.

- Click the star * icon to make a question mandatory - Making a question mandatory will force the user to provide an answer for this question.
- Click the delete✗ icon to delete a question - Deleting a question here will remove the question from the end-users selection list while enrollment. In other words, mandatory question does not give the user the freedom to choose from a set of questions; instead he has to answer what he is asked.

Number of user-defined questions:

User-defined questions are questions that users will set themselves during enrollment process. You can set a number limit on this.

Number of characters for user-defined questions:

Through this option, you can set the limit on number of characters for user-defined questions. Enter the minimum and maximum values.

Number of characters for answers:

Set limits for an 'answer the user can give' during enrollment process. Enter minimum and maximum values as desired.

Verification Codes

Identity Verification codes provide additional security, when Users Reset their Password / Unlock Locked out accounts. The identity of a user is verified through verification codes sent as a notification to the users Configured Communication Medium - "Email address" or "Mobile Number".

The selected communication medium would receive a code from ADSelfService Plus server, which the user should reproduce in-order to establish his identity at the time of password reset / account unlock.

Apart from verification codes, you can also choose to send a "Secure Password Reset/Account Unlock Link" via email to verify a user's identity. When this option is enabled, an email containing a secure password reset / unlock account link will be sent to the users' email address. Clicking on the secure link will take the users to the self password reset or unlock account page from where they can reset their password or unlock their account.

Note: The option to send a "Secure Password Reset/Unlock Account Link" is available only for those users who request password self-service via a web browser and not via mobile apps. Also, the link can be sent via email only; sending it via SMS is not supported as of now.

- Configure Email Verification Codes
- Configure Mobile Number Verification Codes
- Configure both "Email" and "Mobile Number" Verification Codes
- Configure Secure Password Reset/Account Unlock Link via Email

	• Configuration of mail server is a must for both e-mail notification & mail notification. If not configured, then click the "click here" link to go to the "Mail Server" configuration page.

To Configure Notification of Verification Code to a user's Email address:

1. Click on the "Configuration" Tab -->>Multi-factor Authentication (Under "Self Service" section)

2. Select the "Policy" for which Verification Code is to be configured.
3. Click on the "Verification Code" Tab
4. Provide a Check against Enable Verification Code and a Check against "E-mail Address" checkbox
5. Enter the Subject in the text box provided
6. Enter the "Message".
7. Click "Save" to save the settings.

- ADSelfService Plus stores user's email addresses in its database. The email address is collected at the time of user enrollment.
- The existing message can be modified to provide any user defined message.
- **%username%** is a custom attribute used to send a customized message to the end-user. You can also provide other LDAP attributes to address a user %givenName%, %sn%, %initials%, %displayName%, %userPrincipalName%, %sAMAccountName%, %mail%, %distinguishedName% or any other naming format.
- **%confirmCode%** is the Custom Attribute for the code generated by ADSelfService Plus at the time of notification. We recommend not to modify the attribute when editing the message.

To Configure Notification of Verification Code to a user's Mobile Number:

1. Click on the "Configuration" Tab -->>Multi-factor Authentication (Under "Self Service" section)
2. Select the "Policy" for which Verification Code is to be configured.
3. Click on the "Verification Code" Tab
4. Provide a Check against Enable Verification Code and a Check against "Mobile Number" checkbox
5. Enter the "Message" in the text box provided.
6. Click on "Save" to save the settings.

- ADSelfService Plus stores user's mobile numbers in Active Directory's "otherMobile" attribute.
- **%confirmCode%** is the Custom Attribute for the code generated by ADSelfService Plus at the time of notification. We recommend not to modify the attribute when editing the message.
- Click on the "Macros" link to view supported LDAP and Custom Attributes when sending Notification to a mobile numbers.

Configure both "Email" and "Mobile Number" Verification Codes

When you check both "Email" and "Mobile Number" check boxes. The user is provided a choice of medium to get notified of the confirmation / verification code.

1. Click on the "Configuration" Tab -->>Multi-factor Authentication (Under "Self Service" section)
2. Select the "Policy" for which Verification Code is to be configured.
3. Click on the "Verification Code" Tab
4. Provide a Check against Enable Verification Code and a Check against "Mobile Number" and "E-mail Address" checkboxes.
5. Enter the Message.
6. Click on "Save" to save the settings.

To Configure Secure Password Reset/Account Unlock Link via Email:

1. Click on the "Configuration" Tab -->>Multi-factor Authentication (Under "Self Service" section)
2. Select the "Policy" for which the Secure Link is to be configured.
3. Click on the "Verification Code" Tab
4. Provide a check against Enable Verification Code and a Check against "E-Mail Address" checkbox
5. Provide a check against "Send Secure Link via Email"
6. Enter the message in the text box provided along with the %secureLink% macro
7. It is important to include the %secureLink% macro in the email message content for this feature to work.
8. Click on "Save" to save the settings

Configuring Google Authenticator

Google Authenticator adds an extra layer of protection to the reset password/unlock account process. Once enabled, users will be required to enter a six-digit security code generated by the Google Authenticator app for identity verification.

Enable verification via Google Authenticator:

1. **Navigate to Configuration tab --> Multi-factor Authentication (under Self-Service section).**
2. **Select the policy for which the Google Authenticator is to be configured.**
3. **Click the Google Authenticator tab.**
4. **Select the option '**Enable Verification using Google Authenticator app'.
5. **Click Save.**

Once enabled, users can enroll themselves for password self-service using the Google Authenticator app.

Configuring Advanced Settings

Enrollment

The settings available under Enrollment Tab are advanced configuration options of ADSelfService Plus during and after User Enrollment.

Force Users to Enroll

This feature allows an administrator to make enrollment mandatory for End-users. In other words, whenever a non-enrolled user logs into ADSelfService Plus. A message which 'prompts the user to enroll' will be displayed.

Once the user enrolls himself with ADSelfService Plus, he would be granted with the rights to access other features of this application.

Hide "Enrollment" tab from end-users page once they enrolled

This feature will prevent users from modifying the security questions. Prominently used in a scenario where an administrator "Auto Enrolls" users with pre-configured security Question and Answers. He denies users the privileges to change Security Question and Answers.

Reorder the identity verification steps and make them mandatory

This feature allows administrators to select which of the multi-factor authentication options will be enforced, and change the order in which they are employed during the reset password/unlock account process. Once selected, the users will be forced to prove their identity via all the selected authentication options and also in the same order as set by the admin.

However, if the user has previously enrolled for only some of the authentication options that are being enforced, he/she will still be able to reset password/unlock account. Also, if none of the multi-factor authentication options are made mandatory, the user will be allowed to prove his identity via an authentication option that he/she chooses.

Verification Code

The settings available under Verification Code tab are advanced configuration options for gathering the required information for verification code authentication option.

Primary Recipient:

Primary Recipient denotes the AD attributes that houses the mobile numbers and email IDs of users, which will be used to send out the verification code. Apart from the default mail and mobile attributes, you can add other attributes that is being used in AD to store users' mobile numbers and email IDs.

Alternate Recipient:

Force users to specify secondary email address: This option will force users to enter their secondary email address (e.g.: personal email ID) during enrollment. Users can then choose the email address that they have immediate access to during the verification process.

Force users to specify secondary mobile number

This option will force users to enter their secondary mobile number during enrollment. Users can then choose the mobile number that they have access to during the verification process.

Force users to add mobile number in specific format

This option will force users to enter their mobile number during enrollment in a specific format. Enable this option and specify the mobile number format in the text box provided. Click OK to save the settings.

Q&A Settings

Under the 'Q & A Settings' tab, you can configure the display settings of the 'Security Q & A' feature, which serves for the purpose of 'User Authentication'.

The Q & A Settings tab has two sections

1. Question Settings
2. Answer Settings

Question Settings:

From the "Question Settings" section you can define the number of questions displayed to the End-User. And also the format in which the questions are to be displayed.

Options available under the 'Question Settings' are listed below:

- Display a finite number of questions out of the Available list
- Display Security Questions One by One
- Display all Security Questions

An administrator can select any of these options based on the level of security or convenience that he likes to provide his users.

Display a finite number of questions out of the Available list:

- Display _ Questions Out Of (Available list of Security Questions) at Random

With this option, you can define the number of questions to be displayed to the End-User. The questions will be randomly selected by the application from the 'available list of security questions' configured under Security Question and Answer Settings.

Display Security Questions One by One

Checking this option will display the security questions one by one (ie., one question per page).

Display all Security Questions

Selecting this option will display all the security questions on a single page. The questions are listed parallel.

Display of Security Questions One by One or All in a Single Page is based on

1. 'Available list of security questions' configured under Security Question and Answer Settings.
2. Questions selected to be displayed.

Answer Settings:

An administrator can select any of these 'Answer Settings' options based on the level of security or convenience that he likes to provide his users.

Under the 'Answer Settings' option, you are provided with the following 'Self-Explanatory' settings.

- Prevent an User From Providing The Same Answer To Multiple Questions.

- Prevent an User From Using any Word of a Question in his Answers.
- Verify whether the Security Question (s) are Case Sensitive.

Other Settings for Securing the User-Account:

In addition to various "Answer Settings" features, ADSelfService Plus also provides other settings that aid in securing an User account by not letting the security answers be compromised.

- Store Security Answers Using Reversible Encryption.
- Hide Security Answers During Reset / Unlock Operations.

Store Security Answers Using Reversible Encryption:

When an administrator checks this option, the answers provided by End-Users to validate Security Questions at Enrollment are stored in the product database using a Reversible Encryption. This information can be viewed as a report "**Security Questions and Answers Report".**

- By default answers are stored using irreversible encryption. The administrator can view the questions Enrolled but answers will remain encrypted in the report.
- Only the Answers of users who Enroll after this option is checked can be viewed.
- Only Security answers can be viewed and ADSelfService Plus does not show end-users passwords.

Hide Security Answers During Reset / Unlock Operations:

When an administrator checks this option, Answers to Security Questions are hidden to the End-users when they use the application to attempt a Password Reset / Account Unlock operation.

- This lets a user reset his password even when a colleague is near him.

Advanced Configuration

Advanced Policy Configuration Options

The Advanced configuration options in ADSelfService Plus provides additional features for an administrator. These features enhances the security of enrolled users and also allows the administrator to have better control over users who access self service features.

The Advanced Policy Configurations enhances the Self Service Policy.

To configure Advanced features in a Self Service Policy

1. Click on "Configuration" tab -->> Self Service
2. Edit the Desired Policy
3. Click on the "Advanced" button

This will Pop-Up the Advanced Configuration options.

The various tabs available under the Advance Policy Configuration feature are listed below:

- Block User
- General
- Automation
- Password Sync Settings
- Notification
- Reset & Unlock

BLOCK USERS

The "**Block Users**" feature is available as a Tab on clicking the "**Advanced**" configuration button against each Self Service Policy. This Advanced option in ADSelfService Plus enhances the security of an end-user's Active Directory account by blocking illegitimate users.

Using this feature,the administrator can block end-users from accessing the software for a defined time interval, when they do not satisfy conditions set here (fail the identity verification process) .

What limits can be set to Block Users

	A blocked user does not have the access to "Reset Password" or "Unlock Account" features of this application.

Illustration: If you set the following limits

- Maximum invalid attempts **'3'** within **'5'** minutes
- Block user for **'30'** minutes

The above illustration implies - if a user fails to answer security questions 3 times in a 5-minute interval,then he would be prevented (blocked) from using ADSelfService Plus for 30 minutes.

This feature helps to "Block Users" who

- Are not enrolled with ADSelfService Plus.
- Are not pertinent to the corresponding domain.
- Guess security answers by using scripts.(Automated guessing attacks).

It allows an administrator to block user (s) who fail the identity verification process.

RESET AND UNLOCK

The Reset & Unlock tab provides you with the following features:

- Unlock Account during Password Reset
- Upon Password Reset, Force Users To Change Password At Next Logon
- Password Reset/Unlock Account Session Should Last For _ Mins
- Enable Password Strength Analyzer
- Partially hide Email Id/Mobile number on "Verification Code" page
- Prevent a user from using 'Copy & Paste' in the password fields
- Allow users to retry reset without going through ID verification again

Unlock Account During Password Reset

Selecting this option would automatically unlock 'the locked-down user accounts'.This event takes place simultaneously as the end-users perform the 'Password Reset' task.

Upon Password Reset,Force Users To Change Password At Next Logon

This option,when selected,would force the end-users to 'change their passwords' as they try to login to ADSelfService Plus after undertaking the 'Password Reset' operation.

Password Reset/Unlock Account Session Should Last For _ Mins

You - the admin- are provided with the rights to 'configure the time period' for the 'Password Reset/Unlock Account' sessions.

Enable Password Strength Analyzer:

As the name suggests,this option,when selected,will enable the 'Password Strength Analyzer' feature.

Password Strength Analyzer: A feature that assists the end-users to view the strength of the password as they are configure the same. Enabling the 'Password Strength Analyzer' would bring to light, 'a set of standards' that can be imposed onto the passwords that the end-users configure.

The various standards listed under the this feature are: Provide a check against **"Enforce Password Strength Level"** to enforce desired Password Strength.

- Strong
- Good
- Weak
- Too Short

'Strong' & 'Good' are the two ideal standards that can be imposed onto the passwords that the end-users configure..

Partially hide Email Id/Mobile number on "Verification Code" page

Select this option if you want to hide users' mobile number and email ID to be hidden partially when they choose verification code method.

Prevent a user from using 'Copy & Paste' in the password fields

Selecting this option would prevent users from copying texts and pasting it in the password field during password reset or change password. This setting when enabled will force users to type the passwords manually.

Allow users to retry reset without going through ID verification again.

Selecting this option will allow users to retry password reset without having to go through the identity verification process again. For example, if a user enters a password that does not comply with the domain password policy requirements during password reset, the user can retry and directly enter a new password without having to go through the identity verification process again.

Password Sync Settings

Under the 'Password Sync' tab you have the following two options:

Force synchronization of passwords across all linked accounts: This setting, when enabled, will synchronize users' password across all their linked accounts.

Say, a user has linked his Google Apps, Office 365 and IBM AS400 accounts for password synchronization. Now, when a user resets his Active Directory password or password of any other account, the new password will be automatically synchronized across Google Apps, Office 365, IBM AS400 and Active Directory. The user cannot deselect linked accounts during password reset or change password.

Allow users to deselect Active Directory during reset/unlock operations: This setting, when enabled, will allow users to deselect Active Directory from the list of accounts available for password synchronization and reset password for his non-Windows accounts alone.

By default, whenever a user opts for self password reset of his non-Windows account, the new password will be automatically synchronized with Active Directory. With this setting enabled, the user can opt-out of synchronizing his password with Active Directory.

Notification

The feature allows you to send acknowledgements to users, once they manage to successfully reset or change password or unlock account.

How to use:

1. Click on the desired tab : Reset Password (or) Unlock Account (or) Change Password
2. Check the "Enable" check box. You will be able to enter text into the "subject" and "message" fields
3. Type in the desired acknowledgement & click "OK" to save them.

- Configuration of a mail server/modem is a must in order to access this service. If not configured , click the "**click here**" link available in this feature.
- Messages provided in the text boxes can be modified as desired. Users can be send a notification by addressing them with any of the listed **LDAP attributes.** This list can be viewed on clicking on the "Macros" link.
    - %givenName%,
    - %sn%,
    - %initials%,
    - %displayName%,
    - %userPrincipalName%,
    - %sAMAccountName%,
    - %mail%,
    - %distinguishedName%

Automatic Rest and Unlock

The "Automation" tab provides you with the following features:

1. Automatic Reset & Unlock
2. Run Custom Script Upon Successful Password Reset/Change
3. Update Reset Passwords and Account Unlock status on all Domain Controllers

Automatic Reset & Unlock:

The Automatic Reset & Unlock feature provides three options to choose from. You can either choose one or all of the options provided here.

- Automatically Reset Domain Users' Passwords When They Expire
- Automatically Unlock Locked-Down Accounts In Your Domain
- Text/Mail Auto Generated Password to End-User

Automatically Reset Domain Users' Passwords When They Expire

Choosing this option will bring into focus several other underlying options which assist you(admin) to create a scheduler to automatically 'reset the passwords' of the end-users'

Steps Involved In Resetting A Domain User's Password :

1. Enable the "Automatically resets domain users' passwords when they expire" checkbox.
2. Select the type of "Password Reset Scheduler" from the available options.
3. The available options are : DAILY, WEEKLY, MONTHLY, HOURLY

   Choose the option that suits your requirement.

   Click **'Password Reset Scheduler Features'** to view the configuration of the above mentioned options..

4. Set the "Reset The Password To" an entity that will serve as the "New Password"
5. Click on "OK" to save the settings

Password Reset Scheduler Features:

Daily - using this option, a user's password can be reset on "daily basis".You (admin) would have to mention the "time"(using the AT drop-down box) at which this password reset process will take place.

The "new password" which is to be assigned to the user should be specified in the "Reset The Password To" textbox. The usual practice is to reset the password to the user's logon name.

Weekly - This feature provides you the option of resetting the user's password on "weekly basis".You have to 'choose the day' at which the password would be reset.

As mentioned above,the 'time and the new password' also have to be specified for this feature to be deployed onto the end-users.

Monthly - To reset a user's password on monthly basis,you can use the "MONTHLY" option. Here you have to 'specify the date at which the password would be changed,along with the time & the new password'.

Hourly - Choosing this option would enable you (admin) to reset the user's password on "hourly basis".The time intervals at which the password would be reset has to be specified in "Once In Every" drop-down box. Along with this,you would have to 'specify the new password' which is going to be assigned to the user.

Automatically Unlock Locked-Down Accounts In Your Domain

Choosing this option would automatically unlock the 'locked down user accounts'.Therefore,by checking this option,you would prevent the user from going through the hassle of 'remembering the date at which his/her account would get locked up'.

Steps Involved In Unlocking A User's Account In A Domain:

1. Enable the "Automatically Unlocks Locked Down Accounts In Your Domain" checkbox.
2. Select the type of "Account Unlock Scheduler" from the options available.
3. The available options as shown below:
    - DAILY, WEEKLY, MONTHLY,HOURLY

	Configuring the above mentioned options involves the same steps as in configuring the "reset password scheduler"; the only difference is that there is no need for specifying the "new password" as you are dealing with unlocking of the user accounts.

4. Choose the appropriate fields required for the respective option chosen.
5. Click on "OK" to save the settings

Text/Mail Auto Generated Password to End-User:

You have to enable this checkbox in order to dispatch the newly created passwords (via. Automatically Reset Password feature) to the end-user accounts.

II Run Custom Script Upon Successful Password Reset/change:

As the name suggests,this feature,when enabled,would run a script relevant to 'successful password reset/change operation'.

You - as the administrator - are provided with the rights to configure the Script that would be displayed when the user 'resets/changes' his password.

III Update Reset Passwords and Account Unlock status on all Domain Controllers:

Enabling this option would update the current status of the user 'passwords & accounts' on all domain controller machines.

GENERAL

Under the General tab,you are provided with the following options:

- Hide CAPTCHA (Word Verification Image) Checkbox
- Hide Personalize tab from End-Users Page Checkbox
- Tabs Customization

Hide CAPTCHA (Word Verification Image)

As the name suggests,by enabling this checkbox,you can hide the CAPTCHA feature from the following pages:

- Verification Code Page & Google Authenticator Code Page
- Reset Password & Unlock Account Page
- Security Question(s) Page

The above mentioned options come into focus when you enable the 'Hide CAPTCHA' checkbox.

> You - as the administrator - are provided with the option of 'selecting the pages' from which the 'CAPTCHA' feature would be removed.

Hide Personalize tab from End-Users Page:

By enabling this checkbox,you can hide the 'Personalize' tab from the end-user page.

Tabs Customization

Here you can drag and drop the tabs in the order you want them to appear when end-users log in to the self-service portal. Also, you can make a tab as the default tab. When users log in to the self-service portal, the default tab will be shown. To set a tab as default, move the cursor to the top-right corner of a tab. You will see a small tick mark appear. Click on the tick mark to set that tab as default.

Password / Account Expiry Notification:

Notify End-Users of Password / Account Expiry via an email. This tab allows you to configure Password Expiry notification for

- Soon to Expire Password Users
- Account Expired Users

Steps to Configure Account Expiry / Soon-to-Expire Password Notification:

With ADSelfService Plus the administrator will be able to schedule reports for Soon to Expire Password Users in his Domain.

In-order to Schedule Reports for Soon to Expire Password Users the administrator has to configure settings on when the reports are to be scheduled and preset a time when the Locked Out Users report is to be scheduled.

1. Select "Configuration" tab --->> "Self-Service" -->> "Password Expiry Notification"
2. Click on "Add New Notification"
3. Enter the "Scheduler Name" and "Description" for the schedule.
4. Select the desired Domain(s) or OU(s).
5. Select the "Notification Type" from the Drop Down List box ("Password Expiry Notification" or "Account Expiry Notification")
6. Set the "Notification Frequency"
    - Daily AT - Specify time of Day
    - Weekly ON and AT - Specify the day of week and time of the day
    - On Specific Days - Multiple days can be entered.

10. 'Enter the date / day (s)' based on which the user will be notified of his/her password/account expiry.
11. Type the "Subject" of the mail in their respective box.
12. Then type the "Mail Content" in the space provided for it.
13. Click on "Schedule Time" to specify the time at which the mail will be delivered.
14. Click 'Save' to store the configure settings.

Enable Password Expiry Notification:

- ADSelfService will be able to send e-mail notification to all members enrolled in ADSelfService Plus to notify them on a Soon To Expire Password.
- ADSelfService Plus sends a message on password expiry notification with a preset Subject and Message that is configured by the administrator.

While sending a password expiry notification to Domain Users. The notification message can be changed as desired by the administrator. Also the administrator can email a user either by his "initials", "displayName" or any of the below supported attributes.

This can be done by Replacing the variable held within the % symbol with a desired variable.

Eg: **%user%** can be replaced by **%sn%**

Also multiple instances of supported attributes in the message, is supported while notifying users.

Eg: **FirstName_LastName** can be specified as **%initial%_%sn%**

The list of LDAP attributes and Custom Attributes supported can be viewed by clicking on the Macros link.

Supported Attributes while notifying users

{"givenName", "sn", "initials", "displayName", "userPrincipalName", "sAMAccountName", "name", "mail", "distinguishedName" }

Advanced settings:

After setting up a scheduler, configure the advanced settings for password expiry notifications and notification delivery status reports. To specify the required settings, click on the **"Advanced"** button in the Soon-To-Expire Password/Account Notification page.

Notifications:

- **Notify Enrolled Users only:** Enable this checkbox to send Account Expiry/ soon-to-Expire Password Notification to those users who have enrolled with ADSelfService Plus.

- **Exclude Disabled Users:** Enable this checkbox to stop sending Account Expiry/ soon-to-Expire Password Notification to users who have been disabled.
- **Notify Password Expired Users:** Enable this checkbox to notify users of their password expiry.

Reports:

- **Send notification delivery status to users' manager:** Enable this checkbox to send a notification delivery status mail to the manager of the users whose passwords are about to expire.
- **Mail admin the notification delivery status:** Enable this checkbox to mail the administrator the notification delivery status of the mails sent to users whose passwords are about to expire.

Employee Search

Summary:

With the Employee Search feature, you can do the following:

1. Provide end users with an option to search and view information about themselves as well as other domain users
2. Help yourself (administrator) to search and locate users or retrieve any information about them

How to configure the AD search:

1. Click on "Configuration --> Self-Service --> Employee Search".
2. Select the "Enable Employee Search" checkbox
3. Select the "Domain"
    - Click on the "Add OUs" link to perform "OU based Selection"
    - Select the OU's from the Pop-Up and Click on OK
4. You would be provided with 3 tabs:
    1. Users
    2. Contacts
    3. Groups

> Employee Search is a 'criteria based search'. You enable anyone or all of the above mentioned options.

5. Enabling the "**Users**/**Contacts/Groups**" check boxes
    - Select the desired "**Display Columns**'
    - You can 'Configure the Order' in which the Display Columns appear by clicking on the 'UP' & 'DOWN' buttons
    - Configure the "**Search Criteria**"
    - Choose the desired "Search Criteria Options"
    - You can "Configure the Order" of the "Search Criteria Options" using the "Up" & "Down" buttons
6. Click "Save" to store the configured settings

Fine tune Employee Search options

ADSelfService Plus provides more options to the administrators to fine tune Employee Search that best fits the organization's policy.

- Under Employee Search, click **More Options**
- Select **Enable Organization Chart** checkbox to allow employees to view the "Searched Account's Position" in the Organizational Hierarchy
- Select **Hide Unmanaged users in Organization chart** checkbox to hide unmanaged users from search results
- Select **Exclude disabled users from search results and Organization chart** checkbox to exclude disabled users from appearing in the search results and organization chart
- Select **Show Employee Search & Organization Chart on Login Page Also** checkbox to place the "Employee Search" feature on the login page of this application
- Selecting the option **Don't show photos in employee search & organization chart** will hide the employee photos from being shown in the search results and organization chart
- Selecting the option **Use jpegPhoto attribute for photos** will fetch the photo from jpegPhoto attribute in Active Directory
- Click **Save** to save the configured settings

Password Synchronizer

Multi-Platform Password Synchronizer feature of ADSelfService Plus automatically synchronizes Windows Active Directory password resets/changes and account unlocks of a user account across multiple other platforms. This offers users the comfort of maintaining a single password across all systems.

ADSelfService Plus supports a wide range of cloud-based and on-premise applications for password synchronization with Windows Active Directory. The list includes:

1. Google Apps
2. Office 365 / Azure
3. Salesforce
4. Zoho
5. Zendesk
6. Microsoft Dynamics CRM
7. IBM i/AS400 system
8. HP UX Directory Server
9. Oracle E-business Suite
10. Oracle Database
11. AD LDS
12. OpenLDAP

Note: Selecting the option **'Automatically link with AD user account'** will automatically link user accounts having the same usernames in both Active Directory and other platform accounts. If the users' usernames are different in Active Directory and other platform accounts, then users have to manaully link their accounts by logging into the user portal for password synchronization to be successful.

Synchronize Native Password Changes in Windows Active Directory: To synchronize native password changes in Windows Active Directory, you need to install the password sync agent that comes bundled with ADSelfService Plus. The Password Sync Agent, when installed on a Primary Domain Controller (PDC), intercepts the native password change (e.g.: password change via Ctrl+Alt+Del screen or password reset by admins in ADUC console), encrypts the new password, and automatically synchronizes them with the above mentioned systems and applications.

To learn more about the Password Sync Agent and how to install it, please **click here.**

Password Synchronization with Google Apps

Steps to enable API access in Google Apps

Before you can configure Google Apps with ADSelfService Plus for Password Synchronization, you have to enable Domain Admin API access in Google Apps.

1. Sign in to the **Google Admin console**
2. Do one of the following:
   - In the **classic Admin console**, click **Domain settings --> User settings**
   2. In the **new Admin console**, click **More Controls(on the Bottom side) --> Security --> API reference**
3. Check **Enable API access**
4. Click **Save changes**

Steps to configure Google Apps with ADSelfService Plus

1. Go to **Configuration --> Self-Service --> Password Synchronizer**
2. Click **Google Apps** link. You will be presented with Google Apps configuration page.
3. Enter the **domain name** of your Google Apps domain
4. Enter the **username** and **password** of Google Apps admin account
5. Enter a brief **description** of the configuration
6. Select the **Self-Service Policies** by clicking the plus icon. Password Synchronization will be possible for only those users who fall under the selected self-service policies.
7. Select '**Automatically link with AD user accounts**' option. If you enable this, AD user accounts will be automatically linked with user accounts in Google Apps.
8. Click **Save.**

Password Synchronization with Office 365 / Azure

Steps to download and install Windows Azure AD Module

Before you can configure Office 365 / Azure with ADSelfService Plus for Password Synchronization, you have to install the appropriate version of the Windows Azure AD Module for Windows PowerShell for your operating system.

For 32-bit systems:

1. Download and install the Microsoft Online Services Sign-In Assistant from here.
2. Download and install the Windows Azure AD Module for Windows PowerShell from here.

For 64-bit systems:

1. Download and install the Microsoft Online Services Sign-In Assistant from here.
2. Download and install the Windows Azure AD Module for Windows PowerShell from here.
3. After installing the module, move **MSOnline** and **MSOnlineExtended** folders from **C:\Windows\System32\WindowsPowerShell\v1.0\Modules** to **C:\Windows\SysWOW64\WindowsPowerShell\v1.0\Modules**.

Steps to configure Office 365 / Azure accounts with ADSelfService Plus

1. Go to **Configuration --> Self-Service --> Password Synchronizer**
2. Click **Office 365 / Azure** link. You will be presented with Office 365 / Azure configuration page.
3. Enter the **domain name** of your Office 365 / Azure account
4. Enter the **username** and **password** of Office 365 / Azure account
5. Enter a brief **description** of the domain
6. Select the **Self-Service Policies** by clicking the plus icon. Password Synchronization will be possible for only those users who fall under the selected self-service policies.
7. Select '**Automatically link with AD user accounts**' option. If you enable this, AD user accounts will be automatically linked with user accounts in Office 365 / Azure.
8. Click **Save.**

Password Synchronization with Salesforce

Steps to create the required Salesforce API

Note: You need to have **Java jdk 1.6** installed in your environment for the steps to work. Please download and install it before proceeding with the steps given below.

1. Log in to your Salesforce account. You must log in as an administrator or as a user who has the "Modify All Data" permission.
2. Click **<Your Login Name>** at the top right corner and then click **Setup**
3. In the page that opens, navigate to **App Setup (left hand side) --> Develop** and then click **Download your organization-specific WSDL** link.
4. Now, right-click **Generate Partner WSDL** link and save the wsdl file (partner.wsdl) in **<ADSelfService Plus_install_directory\bin>** directory.
5. Before you proceed with the next step, **Stop ADSelfService Plus** and then continue
6. Now open the command prompt (with administrative privileges) and navigate to **<ADSelfService Plus_install_directory\bin**> folder, and execute the following command:

   SFintegration.bat "<java_install_dir>\Java\jdk1.6.x\bin"
7. Once the command is successfully executed, **Start ADSelfService Plus**

Steps to configure Salesforce with ADSelfService Plus

1. Go to **Configuration --> Self-Service --> Password Synchronizer**
2. Click **Salesforce** link. You will be presented with Salesforce configuration page.
3. Enter the **username** and **password** of Salesforce account
4. Enter the **Security Token** of Salesforce account.

Steps To get the Security Token:
Log in to your Salesforce admin account. Navigate to **<Your Login Name> (top right corner)** and then click **Setup**.
In the page that opens, navigate to **Personal Setup (left hand side) --> My Personal Information --> Reset Your Security Token**, and click **Reset Security Token**. The new security token will be sent via email to the email address on your Salesforce user record.

5. Select the **Self-Service Policies** by clicking the plus icon. Password Synchronization will be possible for only those users who fall under the selected self-service policies.
6. Select '**Automatically link with AD user accounts**' option. If you enable this, AD user accounts will be automatically linked with user accounts in Salesforce.
7. Click **Save**

Password Synchronization with Zoho

Steps to generate Auth Token

To configure your Zoho domain with ADSelfService Plus, you need to generate an Authentication token for your account.

1. Copy the code given below and save it as an html file.
2. <form action="https://accounts.zoho.com/getauthtoken/fetchtoken" method="POST">

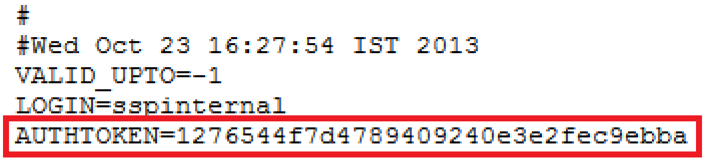
```
    <input type="text" name="login">

                    <input type="password" name="password">

                    <input type="submit" name="submit" value="Submit">

</form>
```

3. Open the html file in a web browser.
4. Enter your **username** and **password**. Click **Submit.**
5. Note down the value of AUTHTOKEN as shown below.
6.



```
#
#Wed Oct 23 16:27:54 IST 2013
VALID_UPTO=-1
LOGIN=sspinternal
AUTHTOKEN=1276544f7d4789409240e3e2fec9ebba
```

Note: The Authentication Token is user-specific and is a permanent token. It will become invalid if the user is deactivated.

Steps to configure Zoho with ADSelfService Plus

1. Go to **Configuration --> Self-Service --> Password Synchronizer.**
2. Click **Zoho** link. You will be presented with Zoho configuration page.
3. Enter your Zoho **domain name.**
4. Enter the **Authentication Token** that you have noted down earlier.
5. Enter a brief **description** of the configuration.

6. Select the **Self-Service Policies** by clicking the plus icon. Password Synchronization will be possible for only those users who fall under the selected self-service policies.
7. Select '**Automatically link with AD user accounts**' option. If you enable this option, user accounts with the same usernames in both Active Directory and Zoho will be automatically linked.
8. Click **Save**

Password Synchronization with Zendesk

Steps to configure Zendesk accounts with ADSelfService Plus

1. Go to **Configuration --> Self-Service --> Password Synchronizer**
2. Click the **Zendesk** link. You will be presented with Zendesk configuration page.
3. Enter the **domain name** of your Zendesk account
4. Enter the **username** and **password** of your Zendesk account
5. Enter a brief **description** of the domain
6. Select the **Self-Service Policies** by clicking the plus icon. Password Synchronization will be possible for only those users who fall under the selected self-service policies.
7. Select '**Automatically link with AD user accounts**' option. If you enable this, AD user accounts will be automatically linked with user accounts in Zendesk.
8. Click **Save.**

Password Synchronization with Microsoft Dynamics CRM

Steps to download and install Windows Azure AD Module

Before you can configure Microsoft Dynamics CRM with ADSelfService Plus for Password Synchronization, you have to install the appropriate version of the Windows Azure AD Module for Windows PowerShell for your operating system.

For 32-bit systems:

1. Download and install the Microsoft Online Services Sign-In Assistant from here.
2. Download and install the Windows Azure AD Module for Windows PowerShell from here.

For 64-bit systems:

1. Download and install the Microsoft Online Services Sign-In Assistant from here.
2. Download and install the Windows Azure AD Module for Windows PowerShell from here.
3. After installing the module, move **MSOnline** and **MSOnlineExtended** folders from **C:\Windows\System32\WindowsPowerShell\v1.0\Modules** to **C:\Windows\SysWOW64\WindowsPowerShell\v1.0\Modules**.

Steps to configure Microsoft Dynamics CRM accounts with ADSelfService Plus

1. Go to **Configuration --> Self-Service --> Password Synchronizer**
2. Click **Microsoft Dynamics CRM** link. You will be presented with MS Dynamics CRM configuration page.
3. Enter the **domain name** of your Microsoft Dynamics CRM account
4. Enter the **username** and **password** of your Microsoft Dynamics CRM account
5. Enter a brief **description** of the domain
6. Select the **Self-Service Policies** by clicking the plus icon. Password Synchronization will be possible for only those users who fall under the selected self-service policies.
7. Select '**Automatically link with AD user accounts**' option. If you enable this, AD user accounts will be automatically linked with user accounts in Microsoft Dynamics CRM.
8. Click **Save**

Password Synchronization with IBM i/AS400 system

Steps to configure IBM i/AS400 system accounts with ADSelfService Plus

1. Go to Configuration --> Self-Service --> Password Synchronizer
2. Click IBM i/AS400 system link. You will be presented with IBM i/AS400 system configuration page.
3. Enter the system name or IP address of the IBM i/AS400 system
4. Enter the username and password of the IBM i/AS400 system
5. Enter a brief description of the system
6. Select the Self-Service Policies by clicking the plus icon. Password Synchronization will be possible for only those users who fall under the selected self-service policies.
7. Select '**Automatically link with AD user accounts**' option. If you enable this, AD user accounts will be automatically linked with user accounts in IBM i/AS400 system.
8. Click Save

Password Synchronization with HP UX Directory Server

Steps to configure HP UX Directory Server accounts with ADSelfService Plus

1. Go to Configuration --> Self-Service --> Password Synchronizer
2. Click HP UX Directory Server link. You will be presented with HP UX Directory Server configuration page.
3. Enter the system name or IP address of the HP UX Directory Server
4. Enter the username and password of the HP UX Directory Server
5. Enter the port number of the HP UX Directory Server. You can also secure LDAP connection between ADSelfService Plus and HP UX server by selecting 'Enable LDAPS' option.
6. Enter a brief description of the system
7. Select the Self-Service Policies by clicking the plus icon. Password Synchronization will be possible for only those users who fall under the selected self-service policies.
8. Select '**Automatically link with AD user accounts**' option. If you enable this, AD user accounts will be automatically linked with user accounts in HP UX Directory Server.
9. Click Save

Password Synchronization with Oracle E-business Suite

Steps to configure Oracle E-business Suite accounts with ADSelfService Plus

1. Go to **Configuration --> Self-Service --> Password Synchronizer**
2. Click **Oracle E-business Suite** link. You will be presented with Oracle E-business Suite configuration page.
3. Enter the **system name** or **IP address** of the Oracle E-business Suite
4. Enter the **schema name** of the Oracle E-business Suite
5. Enter the **port number** of the Oracle E-business Suite
6. Enter the **username** and **password** of the Oracle E-business Suite
7. Enter a brief **description** of the system
8. Select the **Self-Service Policies** by clicking the plus icon. Password Synchronization will be possible for only those users who fall under the selected self-service policies.
9. Select '**Automatically link with AD user accounts**' option. If you enable this, AD user accounts will be automatically linked with user accounts in Oracle E-business Suite.
10. Click **Save**

Password Synchronization with Oracle Database

Steps to configure Oracle Database accounts with ADSelfService Plus

1. Go to Configuration --> Self-Service --> Password Synchronizer
2. Click Oracle Database link. You will be presented with Oracle Database configuration page.
3. Enter the system name or IP address of the Oracle Database
4. Enter the schema name of the Oracle Database
5. Enter the port number of the Oracle Database
6. Enter the username and password of the Oracle Database
7. Enter a brief description of the system
8. Select the Self-Service Policies by clicking the plus icon. Password Synchronization will be possible for only those users who fall under the selected self-service policies.
9. Select '**Automatically link with AD user accounts**' option. If you enable this, AD user accounts will be automatically linked with user accounts in Oracle Database.
10. Click **Save**.

Password Synchronization with AD LDS Server

Steps to configure AD LDS Server with ADSelfService Plus

1. Go to Configuration --> Self-Service --> Password Synchronizer
2. Click AD LDS link. You will be presented with the AD LDS configuration page.
3. Enter the system name or IP address of the AD LDS Server
4. Enter the username and password of the AD LDS Server. The username and password must belong to the administrator account of the server in which AD LDS is installed.
5. Enter the LDAP and SSL port number of the AD LDS Server.
6. Enter a brief description of the system
7. Select the Self-Service Policies by clicking the plus icon. Password Synchronization will be possible for only those users who fall under the selected self-service policies.
8. Select '**Automatically link with AD user accounts**' option. If you enable this option, user accounts in Active Directory will be automatically linked with user accounts in AD LDS Server.
9. Click **Save**.

Password Synchronization with OpenLDAP Server

Steps to configure OpenLDAP Server with ADSelfService Plus

1. Go to Configuration --> Self-Service --> Password Synchronizer
2. Click OpenLDAP link. You will be presented with the OpenLDAP configuration page.
3. Enter the system name or IP address of the OpenLDAP Server
4. Enter the username and password of the OpenLDAP directory. The username and password must belong to the administrator account of the OpenLDAP directory.
5. Enter the LDAP and SSL port number of the OpenLDAP Server.
6. Enter a brief description of the system
7. Select the Self-Service Policies by clicking the plus icon. Password Synchronization will be possible for only those users who fall under the selected self-service policies.
8. Select '**Automatically link with AD user accounts**' option. If you enable this option, user accounts in Active Directory will be automatically linked with user accounts in OpenLDAP directory.
9. Click **Save.**

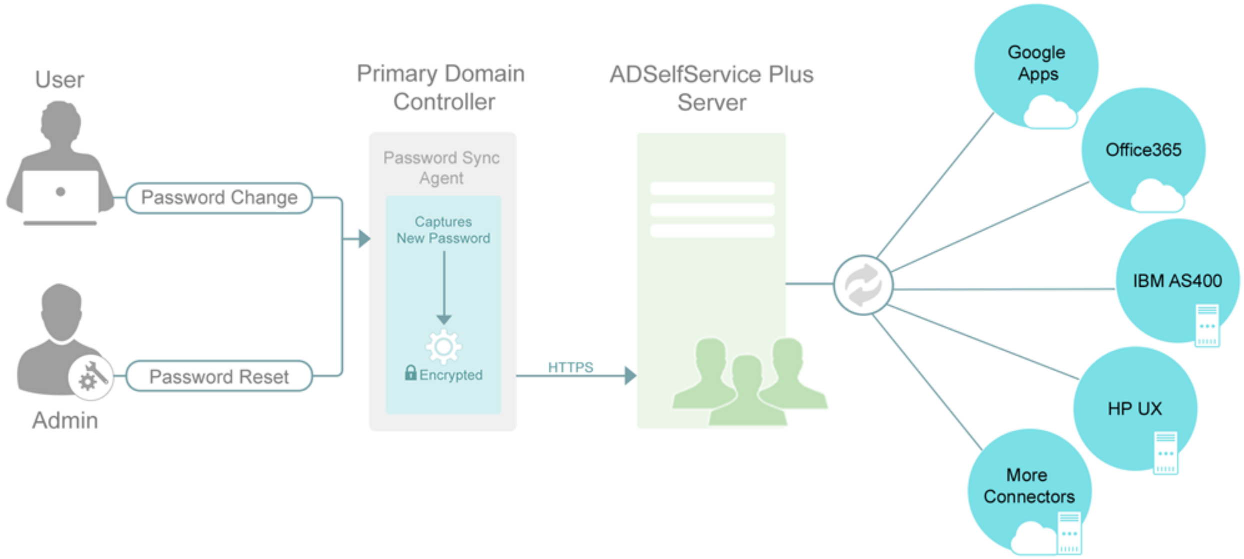
Password Sync Agent

Introduction

Password Synchronization allows end-users to use a single identity, subject to a single password policy, across various systems and applications. ADSelfService Plus has a robust password synchronization technique that now supports even the native Windows password changes using the "Password Sync Agent".

The Password Sync Agent, when installed on a Primary Domain Controller (PDC), intercepts the native password change (e.g.: password change via Ctrl+Alt+Del screen or password reset by admins in ADUC console), encrypts the new password, and automatically synchronizes them with multiple systems and applications.

How it works?



1. When a native password change is initiated, the Password Sync Agent is notified by the domain controller.
2. The Password Sync Agent captures the new password, encrypts it, and then sends it to ADSelfService Plus for synchronization.
3. ADSelfService Plus synchronizes the password with the user's various linked accounts.

4. In case the server on which ADSelfService Plus is running can't be reached, then the agent waits till the server becomes available, and then sends the encrypted password for synchronization.

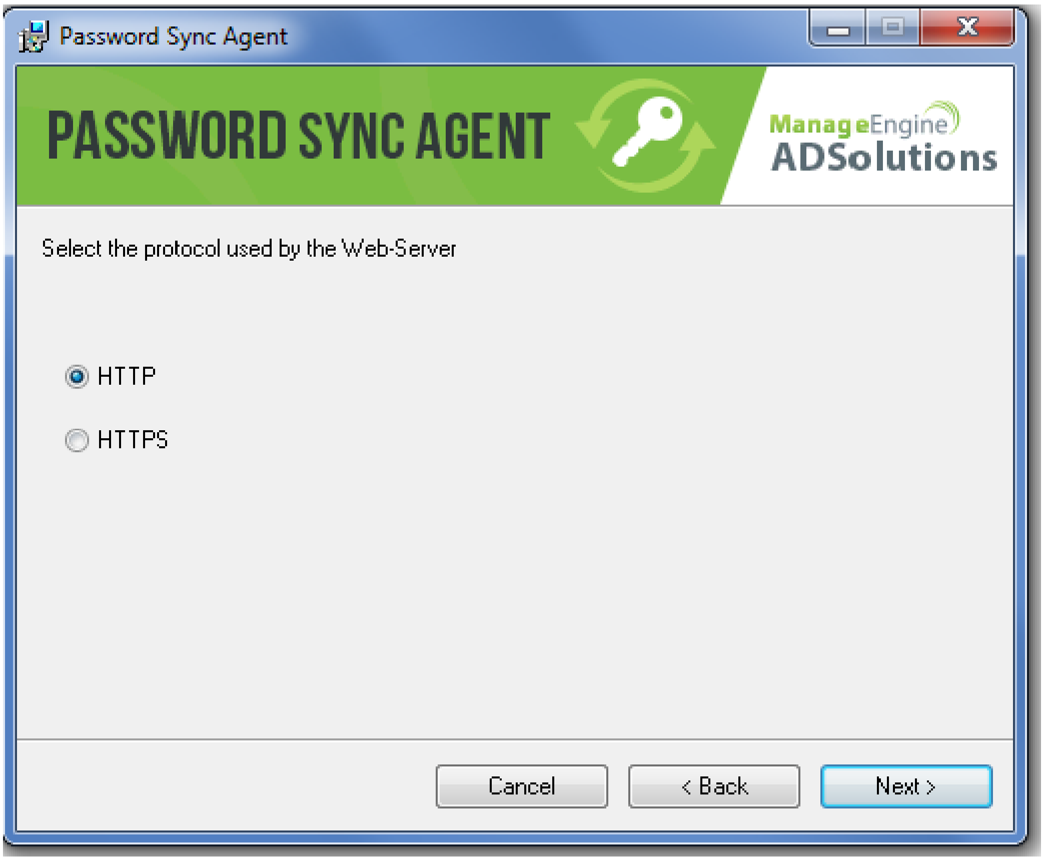
Installation

Pre-requisites

1. The Primary Domain Controller in which the Password Sync Agent must be installed should have been a Full installation instead of a Server Core installation.
2. The Primary Domain Controller should have Microsoft .NET Framework profile 2.0 installed.

Installation Steps

1. Double-click the ManageEnginePasswordSyncAgent.msi file to start the installation. The MSI file can be found at **<installation_folder>\bin\** (eg: C:\ManageEngine\ADSelfService Plus\bin\).
2. Click **Next**.
3. Select the **Protocol (http or https)** used in ADSelfServcie Plus

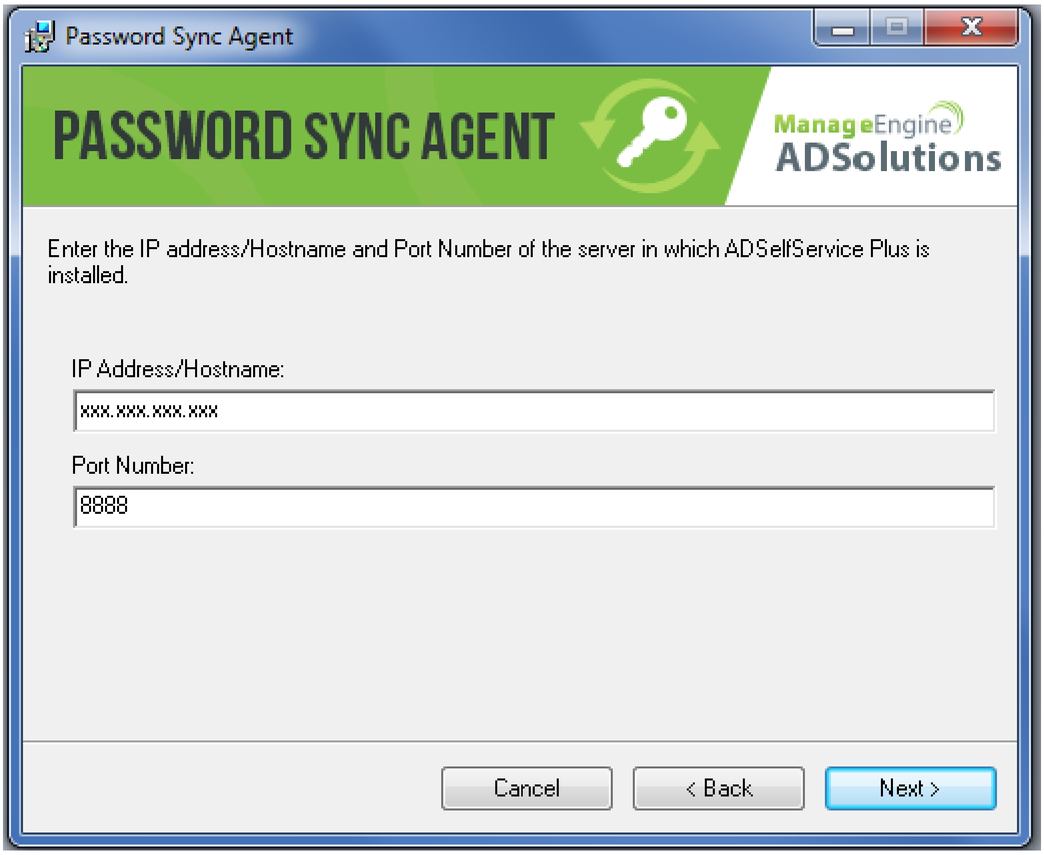


Select the protocol used by the Web-Server

● HTTP

○ HTTPS

1. Enter the **IP address** and **Port Number** of the server on which ADSelfService Plus is installed and click **Next**.



Enter the IP address/Hostname and Port Number of the server in which ADSelfService Plus is installed.

IP Address/Hostname: xxx.xxx.xxx.xxx

Port Number: 8888

2. Once the installation is complete you must **restart the server** (PDC) for the agent to start working.

Note: By default, the password sync agent will be installed in the following location:
In 64-bit systems - C:\Program Files (x86)\ZOHO Corp\Password Sync Agent
In 32-bit systems - C:\Program Files\ZOHO Corp\Password Sync Agent

Making changes to the Password Sync Agent

The Password Sync Agent connects with ADSelfService Plus using the IP address and port number details provided during installation. In the event that you have given incorrect details during installation or moved ADSelfService Plus to a new server, then the changes must be reflected on the password sync agent for it to work properly. The details can be changed by following the steps given below:

1. Right-click the **Password Sync Agent** icon on the System tray and select **Edit Settings**

2. The Edit Settings dialog box will open.
3. Enter the **Server Name / IP Address** and **Port Number** and **Protocol** (HTTPS/HTTP) used by ADSelfService Plus.
4. Click **Save**
5. The new details will be updated in Password Sync Agent.

Mail Group Subscription

ADSelfService Plus allows users to self-service their mail group subscriptions. Users can subscribe to or unsubscribe from mail groups of their choice without having to contact the administrator. Administrators can decide which groups are allowed for self-service subscription to which group of users.

Steps to create Mail Group Subscription:

1. Go to **Configuration --> Self-Service --> Mail Group Subscription**
2. Click **Add New** to create a new mail group subscription
3. Enter the Mail Group Subscription Name and Description
4. Select the desired domain
5. Select the **mail groups** by clicking the plus [➕] icon
6. Select the **users** by clicking the plus [➕] icon
7. Select **'Allow users to see group members'** option, if you want to allow the users to see the members of a group
8. Click **Save**

Steps to modify Mail Group Subscription:

1. Go to **Configuration --> Self-Service --> Mail Group Subscription**
2. You can see a list of Mail Group Subscriptions that you have created
3. Click [⊘] or [✔] icon to disable or enable the mail group subscription respectively. The groups in a mail group subscription will not be displayed on the end-users portal once it is disabled. It will not delete the groups list or users list from that subscription.
4. Click [✎] icon to edit various properties of the mail group like its name, mail groups, users etc.
5. Click [✖] icon to delete the mail group subscription

Administrative Tools

Under this tab, you are allowed to configure the following features:

- Quick Enrollment
- Self-Update Layout
- Gina (CTRL + ALT + DEL)
- Technician
- External Data Sources
- Approval Workflow

Quick Enrollment

As the name suggests, under this tab, you are allowed to configure various features with the help of which the 'user enrollment process' can be brought about effectively.
The features available under this tab are:

- Enrollment Notification.
- Auto Enrollment.
- Force Enrollment.
- External Data Sources.

Force Enrollment

An administrator can configure Force Enrollment to users in the domain, or Users who are part of the Password Policy. Configuring Force Enrollment allows ADSelfService Plus to Search for non-enrolled users and associate their accounts with a Logon Script, which prompts them to enroll whenever they log in to the network

1. Click on Configuration -->>Administrative Tools -->> Quick Enrollment -->>Force Enrollment.
2. Provide a check against the "Enable Force Enrollment" option
3. In the "Message To Be Conveyed" textbox, specify the message for the 'Non-Enrolled Users'
4. Specify the "Server Access URL For Enrollment" - URL configured for accessing the server - in the respective textbox
5. Select the 'Desired Policy (s)' (Policies to which enrollment should be forced)
6. Configure the Scheduler (in order to search for the non-enrolled users & assign their accounts with the "Logon Script")
7. Options available for Scheduling are:
   - Daily
   - Weekly (specify the Day)
   - Monthly (specify the Date)
   - Hourly

Select any one of the above mentioned options

8. Select the "Time" - at which the notification would be displayed - from the drop-down list box
9. Click on "Save" to store the configured setting.

The default location for the 'Logon Script'(ADSelfService_Enroll.hta) is the 'SYSVOL' folder.

In some cases, the 'ADSelfService_Enroll.hta' might not be stored in the 'SYSVOL', owing to some permission issues concerning the Domain Controller. Under such circumstances, make sure to 'copy & paste' the 'ADSelfService_Enroll.hta' (located at <ADSelfService Plus Installation Directory>\Bin) onto the 'SYSVOL' folder.

Already Using A Logon Script ?

The ‘Force Enrollment logon script’ is compatible with any type of logon script that may be running in your system already. In case of “already using a logon script”, you have to follow the steps stated below:

Steps To Be Followed:

(i) If the logon script is a batch file
Add the following line at the end of your logon script

```
path = "<ScriptPath>"
start /d %path% ADSelfService_Enroll.hta
```

(ii) If the logon script is a vb script
Add the following lines at the end of your logon script

```
Set objShell = WScript.CreateObject("WScript.Shell")
path = "<ScriptPath>"
objShell.Run(path+"\"+"ADSelfService_Enroll.hta")
Set objShell = nothing
```

Note: Replace `<ScriptPath>` with the location of ADSelfService_Enroll.hta

Enrollment Notification

After you have installed ADSelfService Plus, it is paramount that you instruct users to enroll with ADSelfService Plus.

Enrollment notification can be used to notify users via email to enroll with ADSelfService Plus to avail themselves of password self-service features.

The notification email is sent only to users who are not enrolled with ADSelfService Plus.

1. Click on Configuration -->>Administrative Tools -->> Quick Enrollment -->>Enrollment Notification.
2. Select the "Domain / OU","Policies" or "Manual" from the drop-down box.
3. In the "Mail Server" textbox, the "Mail Server" that has been configured in the "Server Settings" would be available.
   - To modify the Mail Server or Configure a new server, click on the "Configure Mail Server".
4. Provide the "Subject" for the "Mail" (Eg. Enrollment Invitation).
5. Follow it up with the "Mail Content".
6. Click "Send Mail".

Selecting 'Manual' will allow the administrator to send email to all users entered in the text box provided.

(or)

Selecting Domain / OU will allow the administrator to notify via. email all the users that fall in the selected container (Domain/OU).

(or)

Selecting the Policy will allow the administrator to notify via email to all users who are part of the Policy.

Note: You can also set up a scheduler to notify "non-enrolled and fresh" domain users to enroll with ADSelfService Plus.

Schedule Notification

To enable a scheduler, complete the following steps:

1. Click on the “Schedule Notification” button in the top right hand side of the enrollment notification tab
2. Click on the “Schedule New Notification” button
3. Enter a Scheduler name and description in the respective text boxes
4. Select the Domain or Policy on which the scheduler has to check for Non-Enrolled and fresh users
5. Select how periodically you want the scheduler to run. You can choose to run it Daily, Weekly, Monthly or Hourly
6. Type in the mail subject and content that has to be sent to the Non-Enrolled and Fresh users in the respective textboxes
7. Click on save to create and run the scheduler

Configuring Access URL:

In case you have hosted ADSelfService Plus over the internet or behind a proxy server, you can configure access URL to provide end-users with access to ADSelfService Plus. While sending enrollment notification, access URL will be used as a macro in the email message. Clicking on this link will take users to ADSelfService Plus. Here's how you can configure access URL:

1. Click "Configure access URL" link
2. Enter the "Server Name", "Protocol" and "Port Number"
3. Click "Save"

Auto Enrollment

Auto Enrollment allows you to import enrollment data of end-users and complete the enrollment process on end-users' behalf without their intervention. You can import answers to security questions, both security questions and answers, email ID, and mobile number.

- Auto Enrollment Configuration Steps
- Creating a CSV file
- CSV file with the enrollment data

Auto Enrollment Configuration Steps :

1. Click on Configuration Tab --->>Administrative Tools --> Quick Enrollment -->Auto Enrollment
2. Choose the desired Policy
3. From the 'Import' drop-down menu, select the enrollment data that you want to import
4. You can choose any one or a combination of the available options
5. Click on 'Browse' and 'import the CSV file' (Format should be "SamAccountName,Answer". View the **sample CSV file** for reference)
6. Enable the "Overwrite enrollment data, if enrolled already" checkbox, in order to overwrite the existing enrollment data
7. Click 'Enroll'

The imported question from the CSV file, if different from the existing ones, will get added to the Security Question list

CSV File:

It is a file via which the administrators import the user details. During the auto enrollment of the users, the administrator has to specify the header for these CSV files.

The first line of the CSV file will be taken as the header.

Creating A CSV File:

Creating a CSV file is a very easy task. Open any text editor, type the text and save it with the .CSV extension.

CSV file (with enrollment data):

This file will contain the "Username" followed by the enrollment data like email ID, mobile number, security answers, etc. For example, if you have chosen to import Security Questions, answers, mobile number and email ID, then the CSV file would be like this:

```
samAccountName,question,answer,mobile,mail
Jhon,What is your favorite sport?,Football,9876543210,jhon@test.com
Matrin,What is your favorite color?,Blue,9812345607,martin.alex@test.com
```

External Data Sources

This is a feature of ADSelfService Plus which can be used by you, the admin, to connect in-house data sources like Oracle, MS SQL and MY SQL, and the other external data sources with ADSelfService Plus. These external data sources can then be used to store Enrollment data.

- Establishing Connection
- Fetching the Enrollment Data from an External Database
- Fetch Again

Establishing Connection:

The first step is to "establish connection with an external data base" from where the data is going to be fetched.

1. Select Configuration -->Administrative Tools --> External Data Sources.
2. Click on 'Add New Data Source' to create a new data base Connection.
3. "Data Base Connection" page appears on screen.
4. Enter the "Connection Name" in the textbox provided.
5. Select the 'Data Base Server' from the 'Select DB Server' drop down list box.
6. Specify your "Hostname/IP Address" in the respective box provided.
7. Give the 'Port Address' as well.
8. Choose a suitable Data Base to which the connection is to be made.
9. Mention the "username".
10. Follow it up with the password (if the password has not been configured, then the respective textbox can be left empty).
11. Select "SAVE" to save the settings that were configured.

- The user should have the privileges to execute basic commands in the database server.
- The ADSelfService Plus installed machine must be granted the permission to access the database serv er.

Once the connection has been established, the next step is to fetch the "Enrollment Data" from the external database.

Fetching the Enrollment Data from an External Database:

1. Select Admin -->> External Data Sources.
2. Click on ADD to create a new Enrollment Data fetcher.
3. Enter an apt "Fetcher Name".
4. Select the "Connection" that you just created.
5. Choose the "Policy" to which this "Enrollment Data" will apply.
6. Type the appropriate "Query" to fetch data from the external database table .
7. Click on Save to save the configured settings.

- The general form used while formatting a "Query" is "Select Username, Question, Answer from TableName;" or "Select Username, Mobile Number, Email ID from TableName;"
- "Conditions/Join Queries" too can be used.
- In the case of Oracle Server, avoid "semicolon"(;) at the end of the "Query"

Fetch Again:

Updating an existing data source can be done with the help of a process called "Fetch Again" option.

Eg. Let's say about "100 new users" are added to an "already connected data source" then these users can be easily "updated" using the "Fetch Again" option.

The "Fetch Again" option is indicated by an upward pointed arrow. Clicking on this arrow would update the database with the newly added entities.

Self-Update Layout

Self Update Layout Customization:

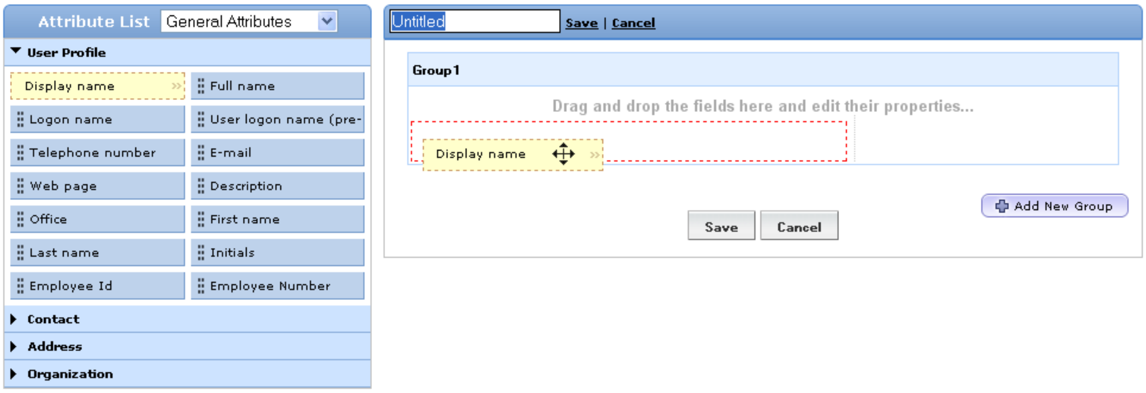
Customized Interface

An administrator can create self update layouts with the simple "drag & drop" approach and choose from multiple field types for an end user to self update. The administrator can provide controlled access to one or more of all the attributes from the available fields for an end user to self update.

By default, ADSelfService Plus sets a policy for the entire domain, when it discovers DCs of a domain. Thus when you log in for the first time (as an administrator) this default policy will be shown to you. Conventionally, every self-service feature is selected. If it fits your requirement, you can retain it; else, you can edit it. Furthermore, you can configure the 4 self-service features too.

Creating a Layout

1. Click on Configuration -->>Administrative Tools -->> Self Update Layout
2. Click on "Create New Layout" Link.
3. Enter the Layout name in the text box and Click Save.
4. Click on the Drop-Down menu and select "General Attributes" or "Custom Attributes".
5. Choose any/all of the fields displayed below the selected attribute.
6. Click on any field on the left and drag & drop in to the layout page on the right.



7. Instantly a "Field Selection" popup will appear. Administrator can work on Field Customization of the field properties.
8. Optional : Click on "Add New Group" to create new groups.
9. Click on Save.

Modifying a Layout

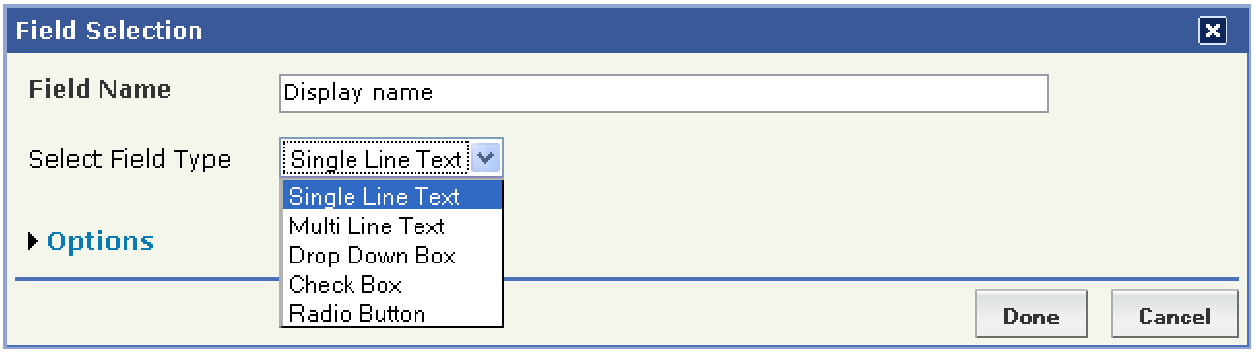
1. Click on Configuration -->>Administrative Tools -->> Self Update Layout
2. Click the ✏ Modify Icon next to the desired layout.
3. To rename the "Layout" / "Group", move the mouse pointer over the layout name / group name. Click on the Edit Icon and enter the desired layout name / group name.
4. Make your changes and Click on "Save".
5. "Successfully Saved" message is displayed.
   Note: The Modified Layout will be displayed under "Available Layouts" and the changed details are listed.

Deleting a Layout

1. Click on Configuration -->>Administrative Tools -->> Self Update Layout
2. Click the ✖ Delete Icon next to the layout to be deleted.

Field Customization

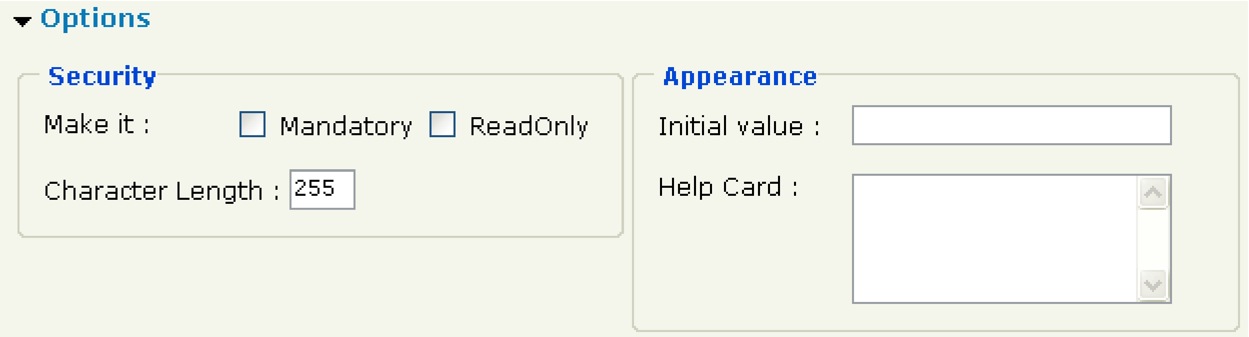
An administrator can customize the fields for the end user self update layout. Administrator can now not only select from the various fields under General Attributes but also create custom fields under Custom Attributes with the LDAP name of choice and choose from the various data types.



- Single Line Text (Field type is suitable for character entry below 255.)
- Multi Line Text (Field type is suitable for manifold character entry.)
- Drop-Down Box (Field type is suitable, when an end user has to select from the available options.)
- Check Box (Field type is suitable, when an end user has to select any/all of the available options.)
- Radio Button (Field type is suitable, when an end user has to select from the available options.)

Options

Administrator can click on the "Options" link within the field selection window and configure the Security and Appearance of the field.



Security

The administrator can make the field entry mandatory or as a read only (administrator to fill-in the information). Ex: Employee number.

Appearance

- Initial Value: Administrator can set the initial value for the field. Ex: For mobile field the initial value can be +91.
- Help Card: Text entered acts as a tool-tip when the end user moves the mouse on the ℹ Help Card Icon.

Attribute List

The Attributes list contains the various fields under various fields with different field types for the broadest assortment of end user self update layout creation. With Custom Attributes, an administrator can create custom fields and add in to the layout along with the General Attributes.

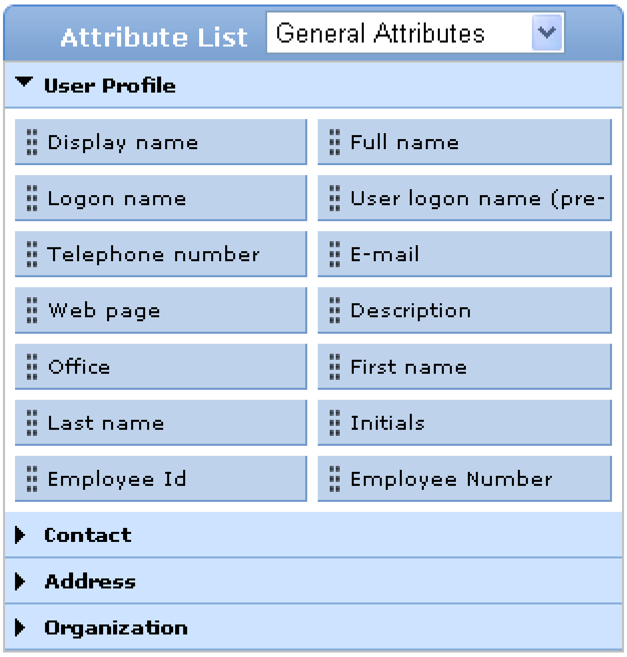
The Self Update layout configured with

- General Attributes
- Custom Attributes

Let us list the default fields under each attribute:

General Attributes

User Profile:



Attribute List General Attributes

User Profile

Display name
Full name
Logon name
User logon name (pre-
Telephone number
E-mail
Web page
Description
Office
First name
Last name
Initials
Employee Id
Employee Number

Contact

Address

Organization

Ex:

Display name:

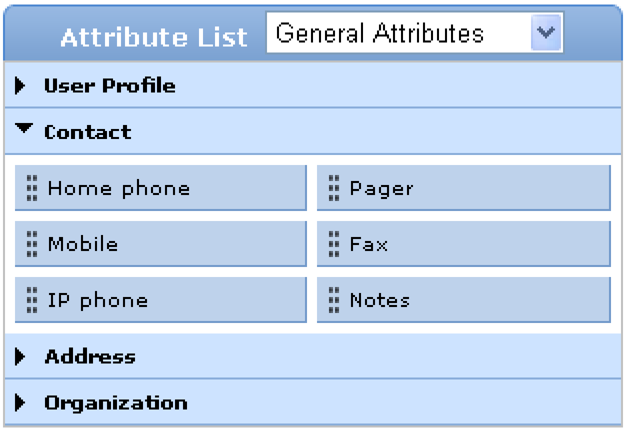
Enter the desired profile name to be displayed.

User logon name (pre-Windows 2000):

The name must be within 20 characters and the following characters are not allowed for usage: \ / [ ] : ; | = , + * ? @ "

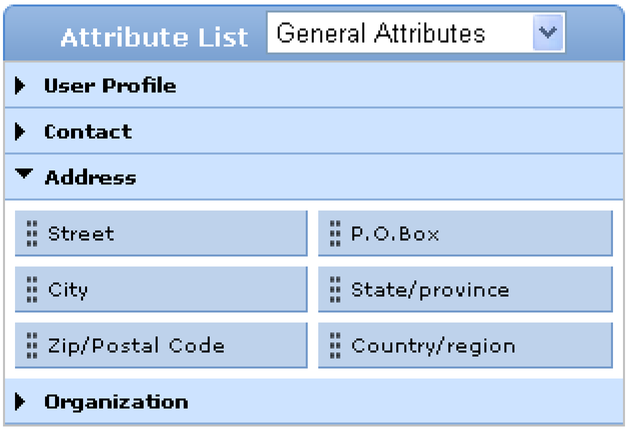
Display name; Full name; Logon name; User logon name (pre-Windows 2000); Telephone number; E-mail; Web page; Description; Office; First name; Last name; Initials; Employee Id; Employee Number

Contact:



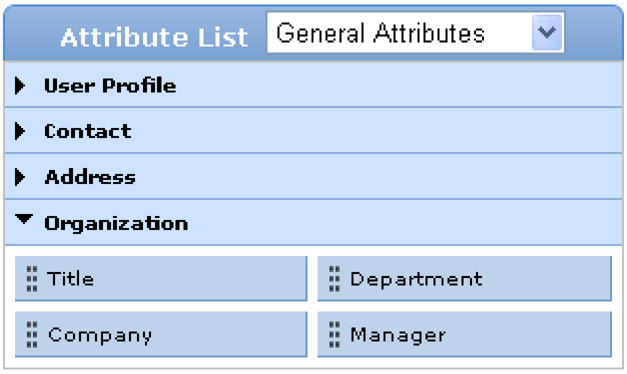
Home Phone; Pager; Mobile; Fax; IP phone; Notes

Address:



Street; P.O.Box; City; State/Province; Zip/Postal Code; Country/Region

Organization:



Title; Department; Company; Manager

Custom Attributes

Administrator can create custom fields under "Custom Attributes" along with the available fields under "General Attributes" with the LDAP name of choice and choose from the following Data Types:

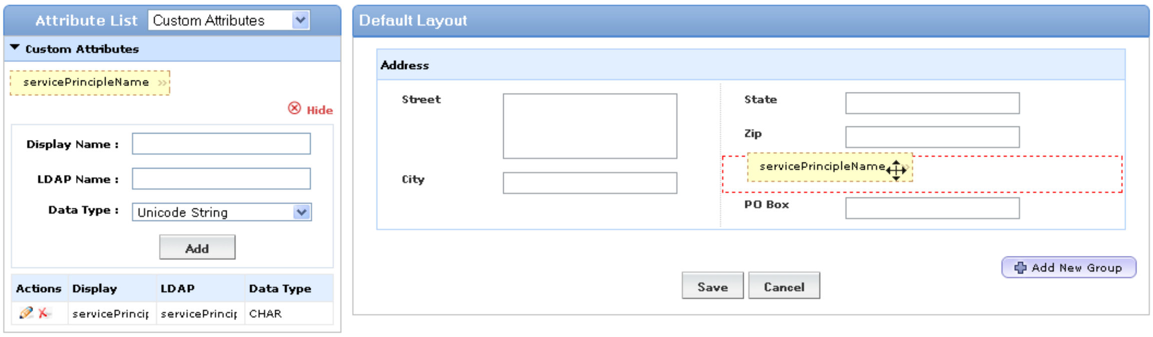
- Unicode String
- Integer
- Boolean
- Large Integer

How to create a custom field with custom attributes?

Creating a Field

1. Click on Configuration -->>Administrative Tools -->> Self Update Layout
2. Click the ✎ Edit Icon next to the desired layout to add a custom field.
3. Select "Custom Attributes" from the "Attribute List" Drop-Down menu.
4. Enter the "Display Name" of the attribute in the Display Name box.
5. Enter the "LDAP Name" of the attribute in LDAP Name box.
6. Select the "Data Type" from the drop down menu.
7. Click on Add.
8. The custom field is displayed under Custom Attributes.

9. Click the custom field on the left and drag & drop in to the layout page on the right.



Actions	Display	LDAP	Data Type
	servicePrincip	servicePrincip	CHAR

10. Instantly a "Field Selection" popup will appear. Administrator can customize the field properties.

11. Click on Save.

Modifying a Field

1. Click on Configuration -->>Administrative Tools -->> Self Update Layout
2. Click the Edit Icon next to the desired layout to modify a custom field.
3. Select "Custom Attributes" from the "Attribute List" Drop-Down menu.
4. Click the Modify Icon next to the desired custom field.
5. Make your changes and Click on "Update".

Deleting a Field

1. Click on Configuration -->>Administrative Tools -->> Self Update Layout
2. Click the Edit Icon next to the desired layout to delete a custom field.
3. Select "Custom Attributes" from the "Attribute List" Drop-Down menu.
4. Click the Delete Icon next to the custom field to be deleted.

Advanced Self-Update Layout Options

The 'Advanced' settings for Self-Update provides additional options for an administrator. Under Advanced settings, administrators can configure 'Photo Updation' options and 'Force users to self-update' their information.

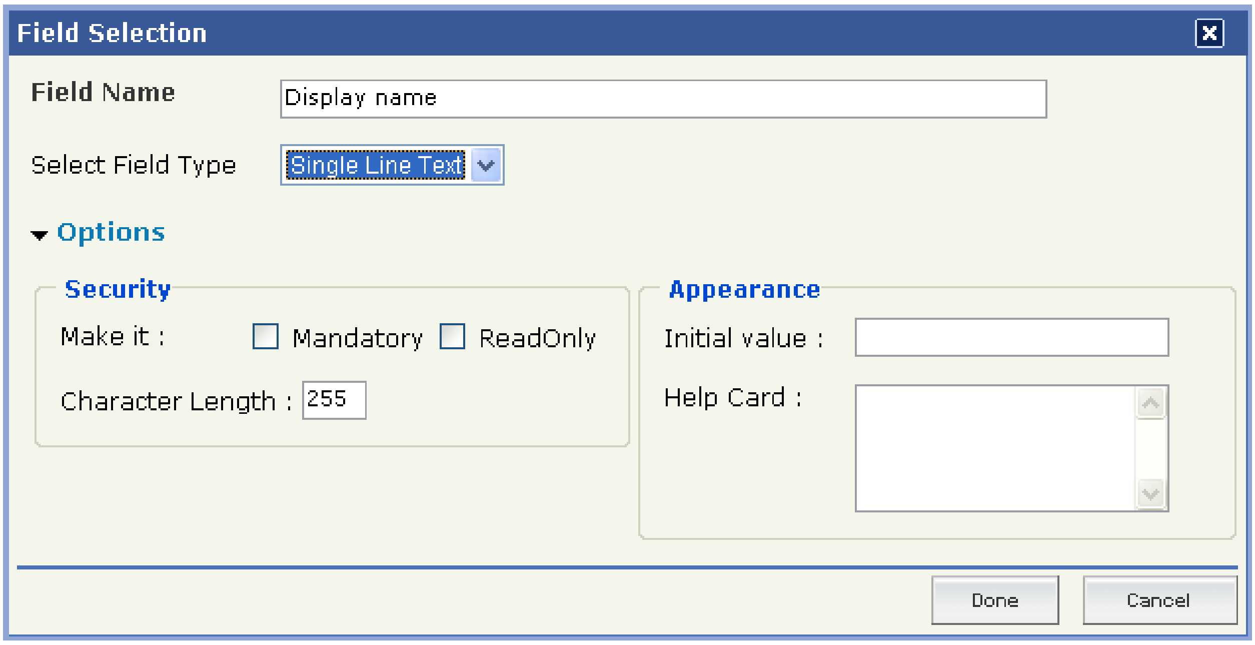
To configure Advanced settings of Self-Update:

1. Navigate to **Configuration --> Administrative Tools --> Self-Update Layout**
2. Click [⚙] **Advanced** settings of the layout that you want to edit
3. Select **'Enable Users to perform Photo Updation'** option to allow employees to upload their photo. The following conditions pertaining to photo updation can be set:
    - Photo Attribute - You can choose whether to store the photo in 'thumbnailPhoto' or 'jpegPhoto' attribute
    - Size
    - Dimension
    - Extension
4. Select **'Force users to update mandatory fields when they log in to the end-user portal'** to ensure users update the required information when they log in to ADSelfService Plus.
5. Click **Done** to save the settings

How To :

Examples

How to set a field as Single Line Text?



Field Selection

Field Name: Display name

Select Field Type: Single Line Text

Options

Security

Make it : ☐ Mandatory ☐ ReadOnly

Character Length : 255

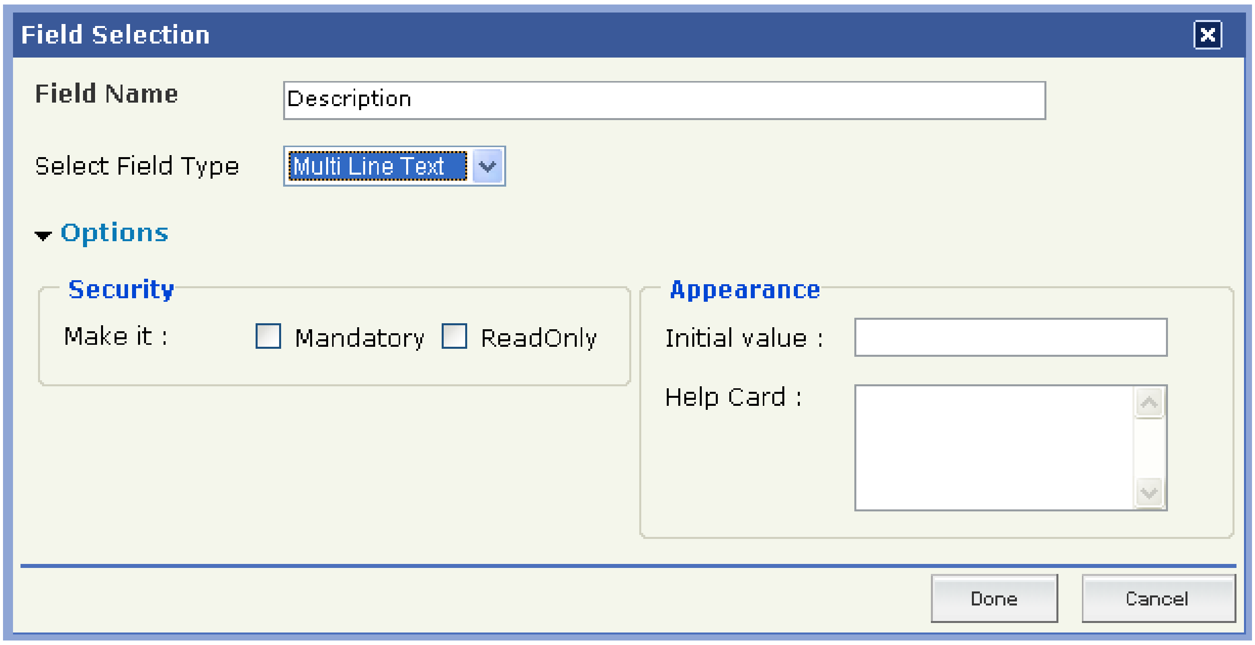
Appearance

Initial value :

Help Card :

1. "Drag and Drop" the desired field into the layout creation area.
2. Select "Single Line Text" field type from the Drop-Down menu.
3. To set Security, check against "Mandatory" or "Read only".
4. Set Character Length.
5. Set Appearance
    - Initial Value (Provide input that will appear as default text).
    - Help Card(Text you enter acts as a tooltip, when the end user moves the mouse on the icon).
6. Click on Done.

How to set a field as Multi Line Text?



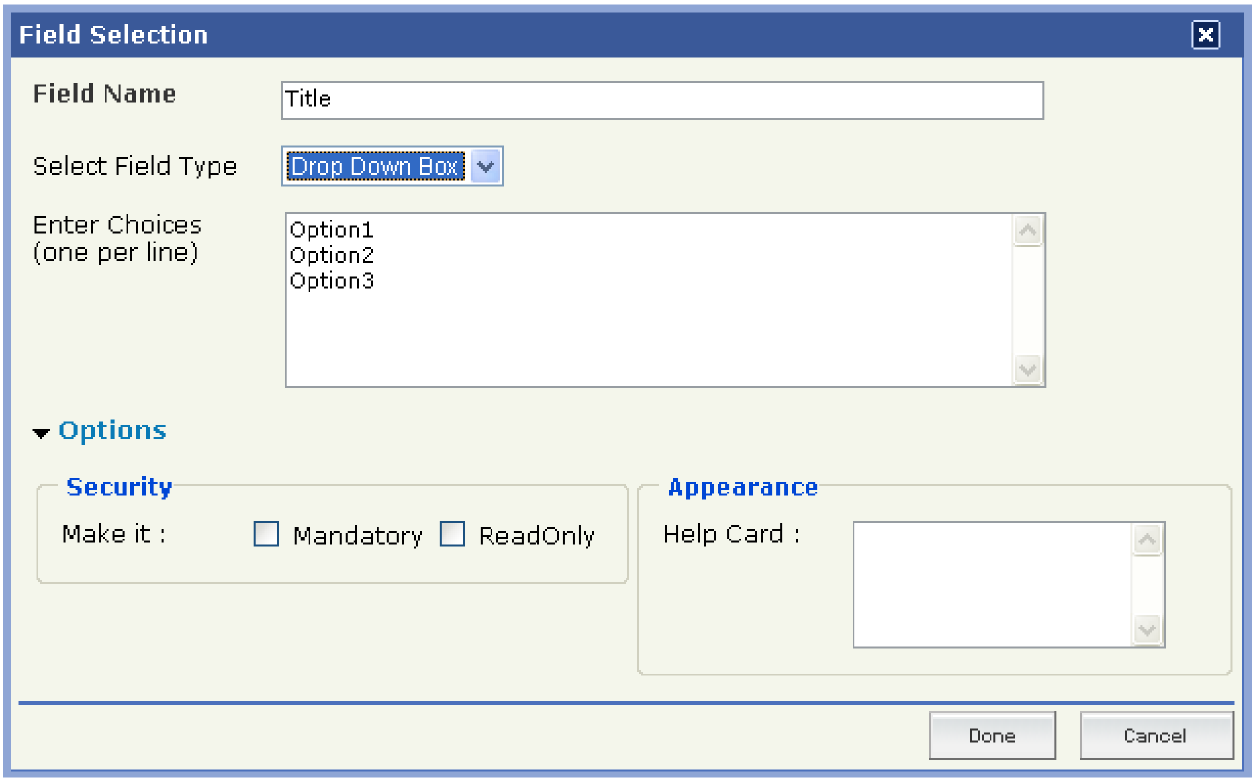
Field Selection

Field Name: Description

Select Field Type: Multi Line Text

1. "Drag and Drop" the desired field into the layout creation area.
2. Select "Multi Line Text" field type from the Drop-Down menu.
3. To set Security, check against "Mandatory" or "Read only".
4. Set Appearance
   - Initial Value (Provide input that will appear as default text).
   - Help Card(Text you enter acts as a tooltip, when the end user moves the mouse on the icon).
5. Click on Done.

How to set a field as Drop-Down Box?



Field Name: Title

Select Field Type: Drop Down Box

Enter Choices (one per line):

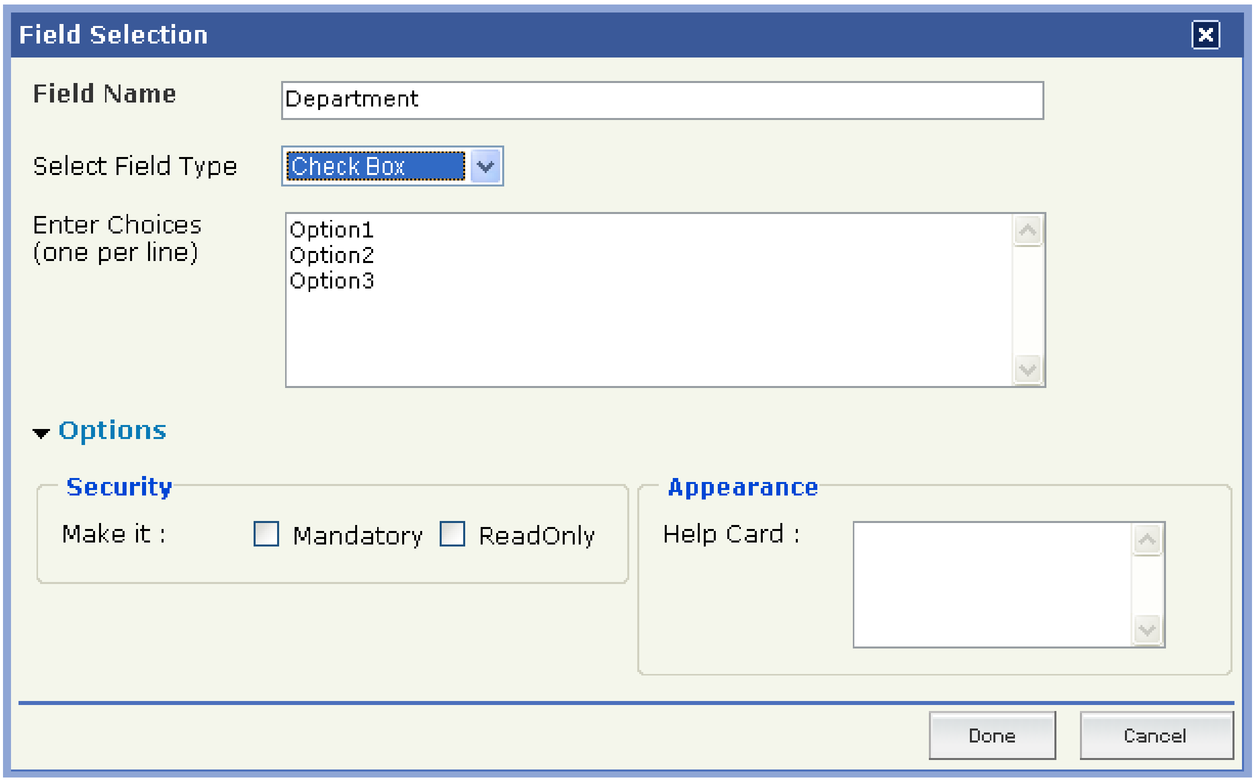
```
Option1
Option2
Option3
```

Make it : □ Mandatory □ ReadOnly

Help Card :

1. "Drag and Drop" the desired field into the layout creation area.
2. Select "Drop-Down Box" field type from the Drop-Down box.
3. Enter your options in "Enter Choices" field.
4. To set Security, check against "Mandatory" or "Read only".
5. Set Appearance
    - Help Card(Text you enter acts as a tooltip, when the end user moves the mouse on the icon).
6. Click on Done.

How to set a field as Check Box?



Field Selection

Field Name: Department

Select Field Type: Check Box

Enter Choices (one per line):
Option1
Option2
Option3

Options

Security

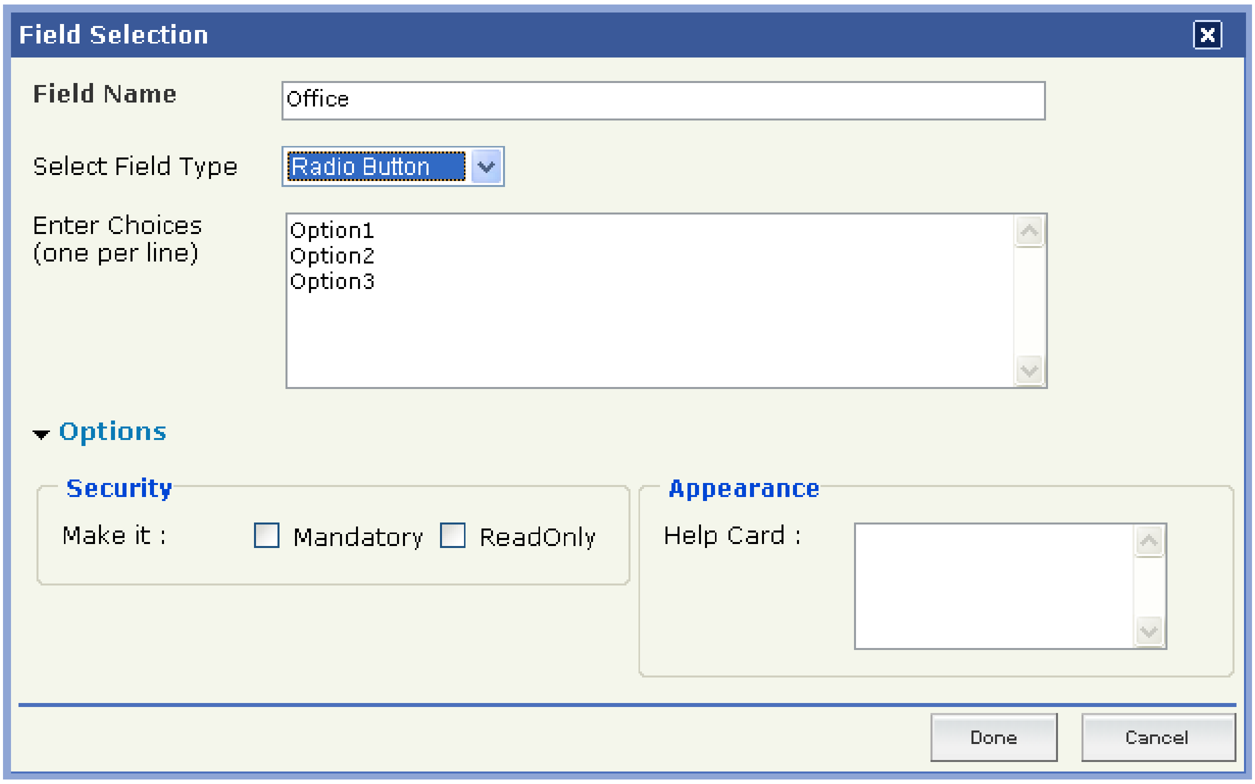
Make it : □ Mandatory □ ReadOnly

Appearance

Help Card :

1. "Drag and Drop" the desired field into the layout creation area.
2. Select "Check Box" field type from the Drop-Down menu.
3. Enter your options in "Enter Choices" field.
4. To set Security, check against "Mandatory" or "Read only".
5. Set Appearance
    - Help Card(Text you enter acts as a tooltip, when the end user moves the mouse on the icon).
6. Click on Done.

How to set a field as Radio Button?



Field Selection

Field Name: Office

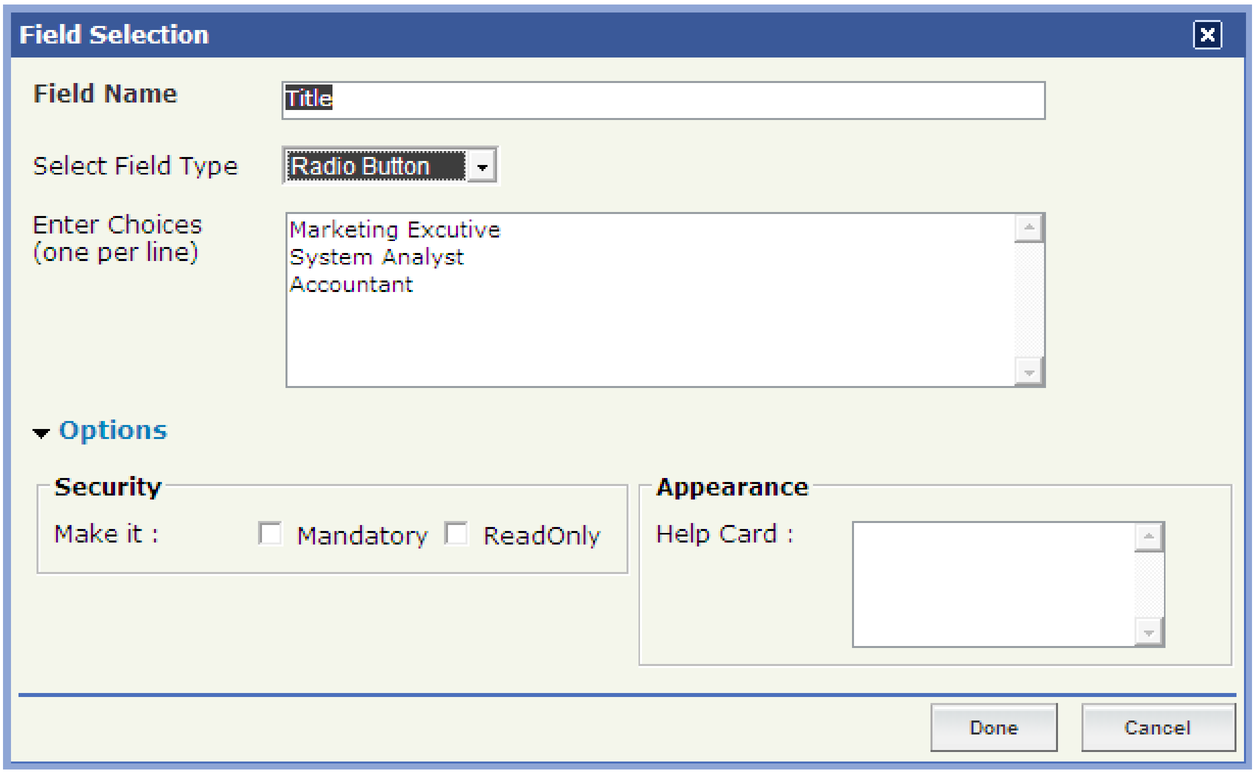
Select Field Type: Radio Button

Enter Choices (one per line):

```
Option1
Option2
Option3
```

1. "Drag and Drop" the desired field into the layout creation area.
2. Select "Radio Button" field type from the Drop-Down menu.
3. Enter your options in "Enter Choices" field.
4. To set Security, check against "Mandatory" or "Read only".
5. Set Appearance
    - Help Card(Text you enter acts as a tooltip, when the end user moves the mouse on the icon).
6. Click on Done.

Example to Customize the Title Attribute:



Field Selection

Field Name: Title

Select Field Type: Radio Button

Enter Choices (one per line):

Marketing Excutive
System Analyst
Accountant

Options

Security

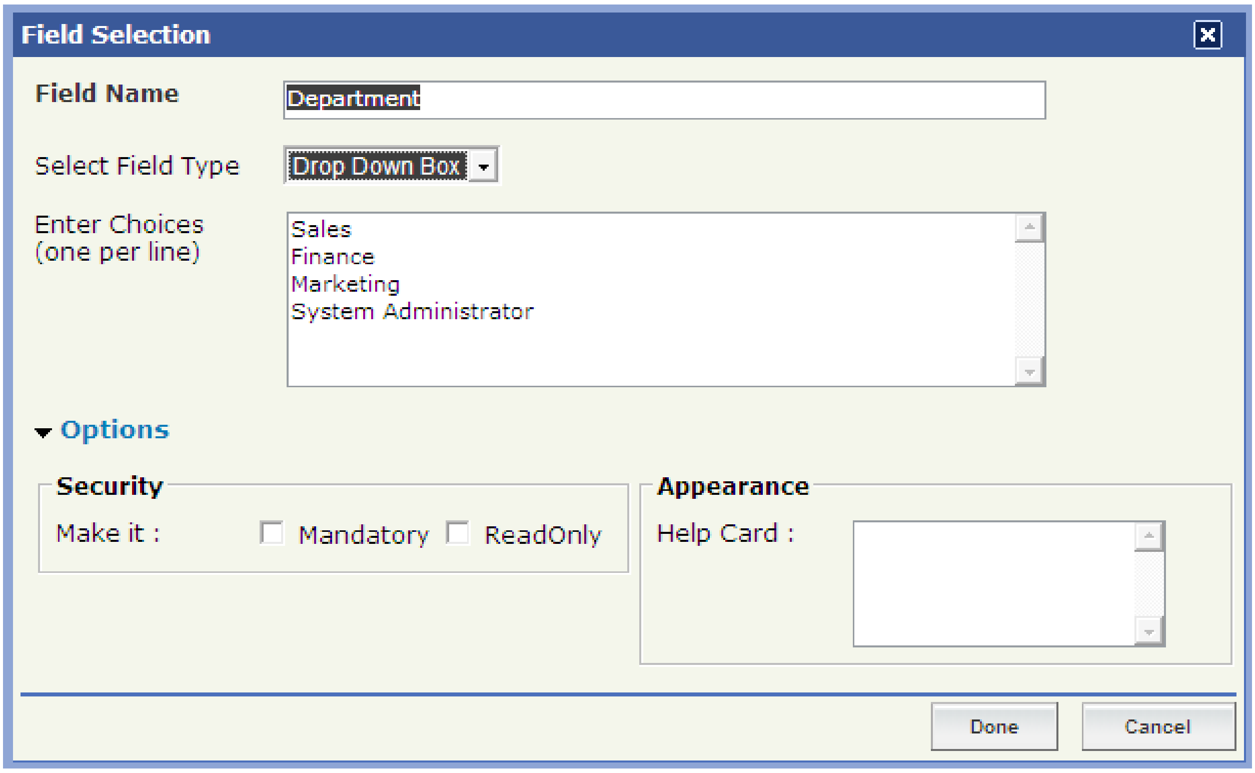
Make it : □ Mandatory □ ReadOnly

Appearance

Help Card :

1. "Drag and Drop" the Title attribute into the layout creation area.
2. Select "Radio Button" field type from the Drop-Down menu.
3. Enter your options in the "Enter Choices" field (as shown in the above figure).
4. To set Security, check against "Mandatory" or "Read only".
5. Set Appearance
   - Help Card(Text you enter acts as a tooltip, when the end user moves the mouse on the icon).
6. Click on Done.

Example to Customize the Department Attribute:



Field Selection

Field Name: Department

Select Field Type: Drop Down Box

Enter Choices (one per line):

Sales
Finance
Marketing
System Administrator

Options

Security

Make it : □ Mandatory □ ReadOnly

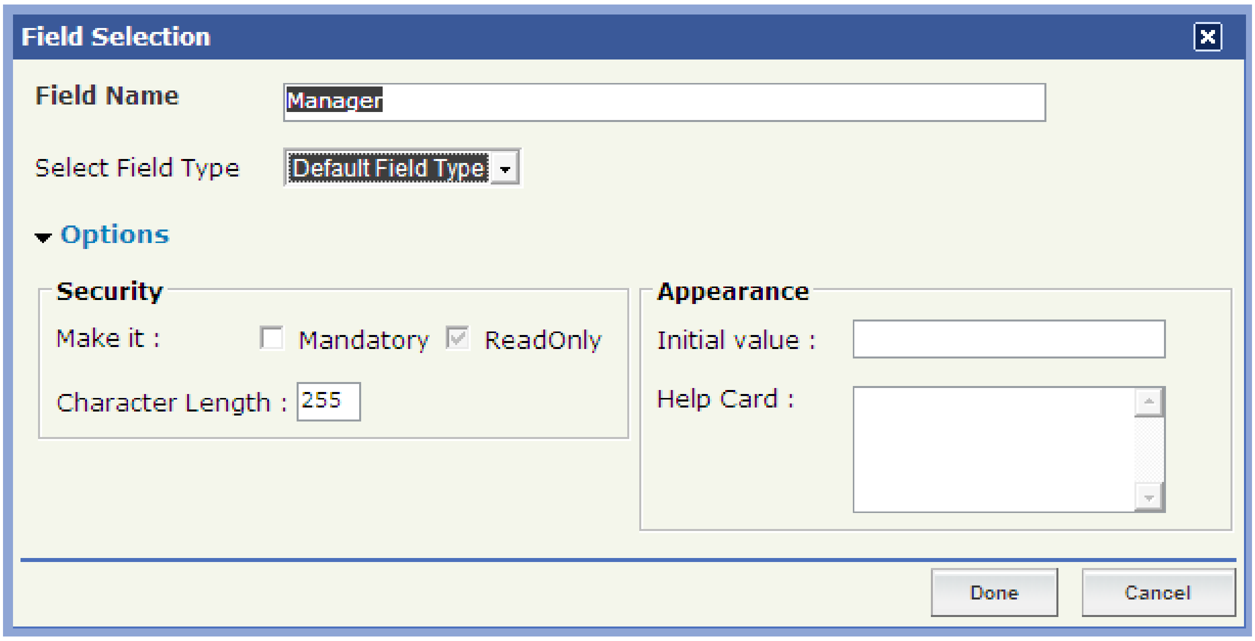
Appearance

Help Card :

1. "Drag and Drop" the Department attribute into the layout creation area.
2. Select "Drop Down Box" field type from the Drop-Down menu.
3. Enter your options in the "Enter Choices" field (as shown in the above figure).
4. To set Security, check against "Mandatory" or "Read only".
5. Set Appearance
   - Help Card(Text you enter acts as a tooltip, when the end user moves the mouse on the icon).
6. Click on Done.

Example to Customize the Manager Attribute:

Default Field Type:



Field Name: Manager

Select Field Type: Default Field Type

Make it : □ Mandatory ☑ ReadOnly

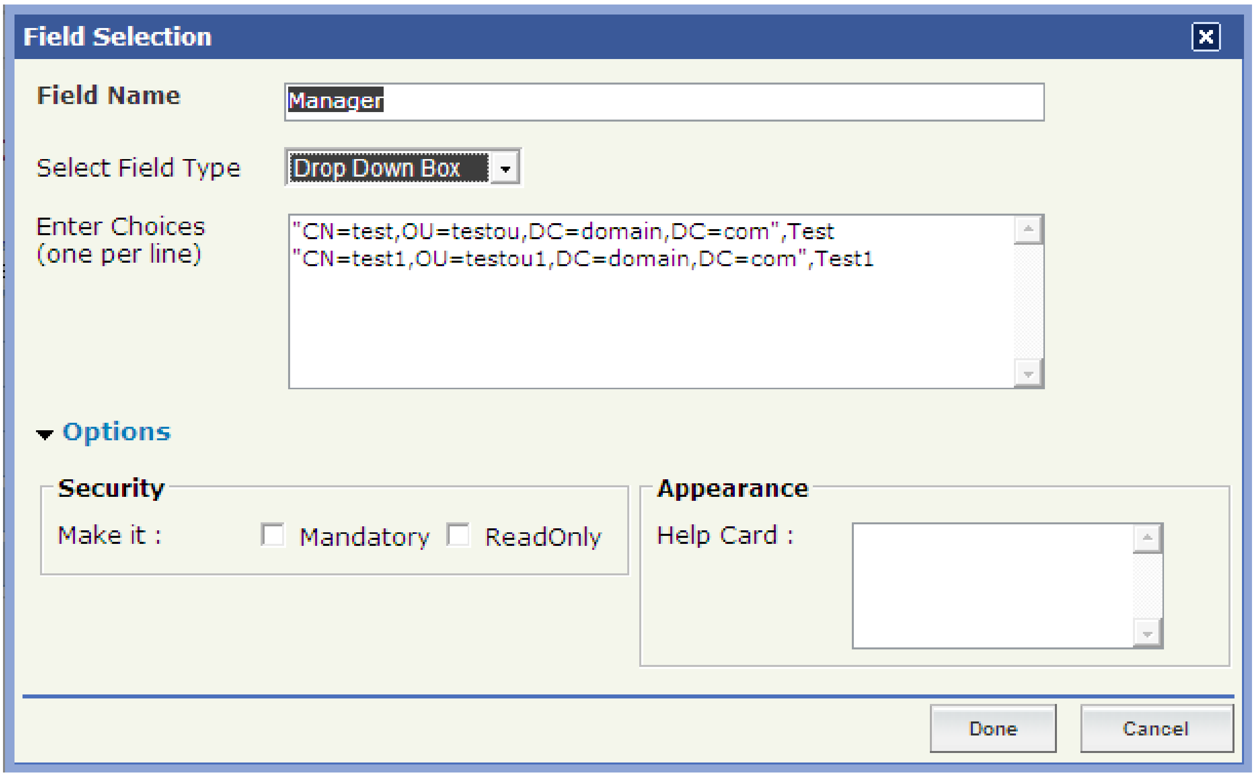
Character Length : 255

Initial value :

Help Card :

1. "Drag and Drop" the Manager attribute into the layout creation area.
2. "Default Field Type" option is preselected in the Drop Down menu.
3. To set Security, check against "Mandatory" or "Read only".
4. Set Appearance
    - Initial Value (Provide input that will appear as default text).
    - Help Card(Text you enter acts as a tooltip, when the end user moves the mouse on the icon).
5. Click on Done.

Drop Down Box:



Field Name: Manager

Select Field Type: Drop Down Box

Enter Choices (one per line):

```
"CN=test,OU=testou,DC=domain,DC=com",Test
"CN=test1,OU=testou1,DC=domain,DC=com",Test1
```

Make it : □ Mandatory □ ReadOnly

Help Card :

1. "Drag and Drop" the Manager attribute into the layout creation area.
2. Select "Drop Down Box" field type from the Drop-Down menu.
3. Enter your options in the "Enter Choices" field (as shown in the above figure).
4. To set Security, check against "Mandatory" or "Read only".
5. Set Appearance
   - Help Card(Text you enter acts as a tooltip, when the end user moves the mouse on the icon).
6. Click on Done.

Gina/Mac Installation

Gina / Mac (Ctrl + Alt + Del)

ADSelfService Plus application allows you to configure Gina/Mac (Ctrl + Alt+ Del) which enables the end-users to reset passwords/unlock accounts from "winlogon screen" and "Mac logon screen".

Gina / CP Installation:

This feature is an extension of the standard "Microsoft GINA", which comes with the additional functionality of displaying the "Reset/Unlock' button in the"WinLogon"(CTRL + ALT + DEL)screen.

For the users to "Reset/Unlock" their "Passwords/Accounts" at the press of "CTRL+ ALT+ DEL" keys, the Client Software(MSI package) must be installed in their respective systems.

In ADSelfService Plus , the "Client Software" installation process can be effected in the following ways:

1. Installation from the ADSelfService Plus Console.
2. Installation via GPO (Group Policy Object).
3. Installation via SCCM (System Center Configuration Manager).
4. Manual Installation.

Mac logon agent Installation:

This feature extends the Mac logon screen and places a "Reset Password/Unlock Account" button, which users can use to reset their Active Directory passwords or unlock their accounts. In ADSelfService Plus, the "Client Software" for Mac clients can be installed in the following ways:

1. Installation from the ADSelfService Plus Console.
2. Manual Installation.

Client Software Installation From The ADSelfService Plus Console

It is possible to perform "Bulk Installation of the Client Software" onto the user machines (of the entire domain (or) the selected computers) from a centralized ADSelfService Plus console.

The two different methods used for such a "Client Software Installation" are:

1. Domain Based Installation
2. Organizational Unit(OU) Based Installation

Domain Based Installation:

1. Navigate to Configuration -->Administrative Tools --> GINA/Mac (Ctrl+Alt+Del) --> GINA/Mac Installation
2. Click "New Installation"
3. Select "Domain" from the drop down list
4. Select the computers from the available list
5. Clicking on "Operating Systems" will let you choose the operating system **(Windows or Mac or All)** to install the client software.
6. Click "Install"

Organizational Unit(OU) Based Installation:

1. Click on "Configuration --> Administrative Tools --> Gina/Mac (Ctrl+Alt+Del) --> GINA / Mac Installation"
2. Click on "New Installation"
3. "Select Domain" from the Drop Down list
4. Click on "OU Based Filter"(present at the top right corner)
5. Select "List View" or "Tree View" to view the List of Organizational Units (OUs) in the Domain
6. Check against the desired "OU" and click on "Get Computers"
7. This will 'display' the 'list of computers' in the selected OU
8. Check against the 'desired computers' and click on 'Install'

The Installation process would be completed in a short time and the message "Process Is Completed" would be displayed. Click on "OK" button to return to the GINA/CP installation screen.

Import Computers:

The "Import Computers" link is used to import computers via CSV file for the purpose of "Client Software " installation.

To import computers for "Client Software" installation

- Click on "Import Computers" link
- Click on "Browse" and "Select" the CSV file
- Hit the "Install" button

View Installed Machines:

All the "Client Software" installed machines are listed under the "Installed Machines" tab. To view all the"Client Software Installed Machines" in the Domain

- Click on the Installed Machines tab
- Select the Domain from the Drop Down Box
- This lists all the Computers in which "Client Software" has been installed

View Error Occurred Machines:

Error might occur while installing the "Client Software".The computers that are subjected to such errors are listed under the "Error Occurred Machines" tab.

To list all the "Error Occurred Machines" in the Domain

- Click on the Error Occurred Machines tab
- Select the Domain from the Drop Down Box
- This action lists all the Machines where 'GINA/Mac' installation could not be completed

Remove / Re-install Client Software :

- Click on **Un-install** (This will remove the Client Software from all the Machines one selects from the available list).
- Click on **Re-install** (This will re-install Client Software onto machines where installation could not be completed but gets displayed under "Installed Machines" List)

NOTE:

- The 'Reason' behind the failure of 'GINA/Mac' installation will also get listed when you view the list of 'Error Occurred Machines'
- "Remove/Re-Install" buttons would appear only when you click on the "Installed Machines" or "Error Occurred Machines" tab .

"Export " & "Printable View" Options:

The "Export As"option is used to export the list of "Client Software Installed' & 'Error Occurred" computers in different file formats like CSV,HTML,PDF & XLS. This process is usually carried out for auditing purposes. "The Printable View" option is used to preview the printable version of the "Client Software Installation" feature.

1. You have the option of performing a quick search for "filtering and finding the desired computers" using the "Quick Search" option instead of going through all the computers one by one.

Client Software Installation via GPO (Group Policy Object).

For complete information on Client Software Installation via GPO refer the link provided here.

Client Software Installation Via System Center Configuration Manager

System Center Configuration Manager

System Center Configuration Manager is one of the methods of client software installation used to distribute the client software over a given domain. System Center Configuration

Manager is a systems management software product by Microsoft for managing large groups of Windows-based Computer Systems. The SCCM offers remote control, patch management, software distribution, operating system deployment, network access protection and hardware & software inventory. To make use of the SCCM feature, it must be installed in your system.

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Steps To Be Followed To Create A Package:

1. Start up your 'Configuration Manager Console' and click on the 'Site Database->Computer Management ->Software Distribution' and then Select Packages' in the left pane.
2. Right click on the 'Packages' and select 'New -> Package'(A 'New Package Wizard' will open up)
3. Fill in the 'General Package' properties (as you desire)
4. In the 'Data Source' tab, select the 'This Page Contains Source Files' checkbox and click on 'Set' to specify the source of the 'SCCM' package.
5. Change the 'Source Directory' location to 'Local drive' on 'Site Server' and browse to the path of your package
6. Click 'OK' & Set the 'Schedule to update the Distribution Points'
7. Set the 'Data Access' Options or 'Revert to the Default Settings'
8. In the 'Distribution Settings' tab, 'Set the Priority of the Package' to 'high'
9. Under the 'Reporting' tab, set the MIF(Management Information Format) properties as 'Default' .
10. Set the 'Security Rights' for the package
11. Review the 'Summary of the Selected Choices'
12. Click on 'Next' to install the 'Package'
13. A confirmation message will appear that the 'Package has been Installed'

Creating A Program For The Package:

1. In Configuration Manager Console,expand the newly 'Added Package' & right click on 'Program'
2. Choose 'New -> Program'
3. Fill in the Program Details (under the 'General' tab) Provide the 'Command Line' as follows:"**msiexec /i ADSelfServicePlusClientSoftware.msi SERVERNAME=selfservice.xyz.com PORTNO=8888 /qn**".
4. In the 'Requirements' tab,select the 'The Program can run on Specified Client Platforms' option & choose the 'desired operating systems'
5. Under the 'Environment' tab,choose 'Program Can Run Whether Or Not The User Is Logged In' option
6. In the 'Advanced Settings' tab,leave all the settings as they are (that is,'default settings')
7. Ignore the 'Windows Installer Package' tab
8. Under the 'MOM Maintenance' tab,select 'Generate Operations Manager alert if this program fails' option
9. Review the 'Summary Of The Program' and then click 'Next'
10. Click 'Close' to finish

Advertising The Package:

Once the package has been created along with the programs,the next step is to 'Advertise the Package'(specifying the programs that you want your clients to run).This can be done as follows:

1. In the 'Configuration Manager Console', select 'System Center Configuration Manager ->Site Database ->Computer Management -> Software Distribution ->Advertisements'
2. Right click on 'Advertisement' & select 'New -> Advertisement'
3. Fill in the details for the 'Advertisement' as follows:

   Under the 'General' tab,provide the various details of the Advertisement as follows:

   - 'Name' (of the program)
   - Comment (regarding the program)
   - Click on 'Browse' buttons to choose the 'Package,Program & Collection'

When prompted about 'Distribution Points',click 'Yes' (the updation of the 'Distribution Point' would be done at the end)

In the 'Schedule' tab,set the schedule for the 'Advertisement' as follows:

- Set the 'Date' & 'Time' for the Advertisement
- Click on the 'Yellow Star' to set the 'Mandatory Settings'
- Set the 'Priority' to 'High'

Review the changes.

Under the 'Distribution Points' tab,

- Provide the necessary information

Review your distribution point settings on fast or slow LAN

Under the 'Interaction' tab,

- Set the Time Interval to 15 minutes

Under the 'Security' tab,

- Review the 'Security' settings

4. Summary Of The Advertisement' would be displayed,click on 'Next' to finish

Creating The Distribution Points

In the SCCM Configuration Manager Console

1. Select the 'Configured Package' & right click on it .Select 'New Distribution Points'
2. 'New Distribution Points' wizard opens up
3. Click 'Next' to continue
4. Select the 'SCCM Server' from the available list & click 'Next'
5. Under the 'Confirmation' tab,review the 'Summary Of Selected Choices' & click 'Close'

Updating The Distribution Points

1. 1 Right click on the 'Distribution Points' & choose 'Update Distribution Points' option
2. A dialog box would appear stating that 'Are You Sure You Want To Update All Distribution Points?'
3. Click 'Yes'

Distributing The Created Package:

In the SCCM Configuration Manager Console,

1. Select the 'Configured Package' & right click on it.
2. Select 'Distribute -> Software' the 'Distribute Package Wizard' will open up
3. Under the 'Distribution Points' tab,select the 'Distribution Points' option & click on 'Next'
4. Under the 'Advertise Program' tab,select 'Yes' for 'Do you want to advertise a Program from this Package' option
5. In the 'Select Program' tab,select the 'Program that you want to Advertise to the members of a Collection'
6. Click on 'Next'
7. Specify various details concerning the 'Advertisement of the Program' as mentioned below:

   Specify the 'Collection' that should receive the 'Package'

   - You can either specify 'An Existing Collection' (or) 'Create A New Collection'

   Specifying An Existing Collection:

   - Click on 'Browse' & Select the 'Desired Collection'
   - Click on 'Next'

   Specifying A New Collection

   - Give the 'Name & Comment' for the 'New Collection'
   - Provide atleast 'One Membership Rule' & click on 'Next'
8. Provide the 'Advertisement Name & Comment' in the respective textboxes.
9. Click on 'Next'
10. Under the 'Advertisement Subcollections' tab,specify 'Whether the Advertisement should be made available to Subcollections or not' & click 'Next'
11. Configure a 'Scheduler' for the Advertisement under the 'Advertisement Scheduler' tab & click 'Next'
12. Under the 'Assign Programs' tab,provide the necessary specifications & click on 'Next'
13. A 'Summary of the Advertisement'(with the specified requirements) would appear
14. Clicking on 'Next' would 'Distribute the Package' successfully

	You can speed up the 'Distribution of Advertisements' by initiating the 'User Policy Retrieval & Evaluation' and 'Machine Policy Retrieval & Evaluation' cycles respectively. These cycles can be initiated from the 'Action Tab' of the 'Configuration Manager Properties' in the control panel (on your client computers).

Manual Installation Of Client Software

An alternative method for the "Client Software Installation" is to manually install the software onto the client machines.

To view the "MSI package" for Windows or "PKG file" for Mac, navigate to the location where the ADSelfService Plus has been installed and select the "Bin" folder.

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Steps To Be Followed For The Manual Installation Of The Client Software :

- For Windows Clients
- For Mac Clients

For Windows Clients:

Copy & paste the 'MSI package' onto the Windows computers (where the Client Software is to be installed), then

1. Right click on the 'MSI package' & click on 'Install'
2. The "ADSelfService Plus Client Software Setup Wizard" will appear. Click
3. "Next" to continue
4. Select Installation Folder" page would appear
5. To select the "location of your choice" - for the installation of the Client Software - click on "Browse" and select the desired location
6. Click on "Next" to continue "ADSelfService Plus Server Details" page would open up
   - Provide the "Name of the ADSelfService Plus Server" in the respective text box provided
   - Follow it up with the "Port Number of the ADSelfService Plus Server".Declare the port number in the "HTTP" mode (this version is also compatible with the "HTTPS" mode)
7. Click on "Next" to continue
8. "Confirm Installation" page would appear, click on "Next" to go ahead with the installation

9. This would lead you to the "Installation Complete" page, where the message "ADSelfService Plus Client Software has been successfully installed" would be displayed
10. Click on "Close" button to exit the "GINA/CP Client Software Setup Wizard".

Manual Installation Via Command Prompt:

It is also possible to install the "GINA/CP Client Software" with the help of "Command Prompt" instead of using the "GINA/CP Client Software Setup Wizard".

The command which is executed for the Installation process is "msiexec /iADSelfServicePlusClientSoftware.msi SERVERNAME=selfservice.xyz.com PORTNO=8888 /qn".

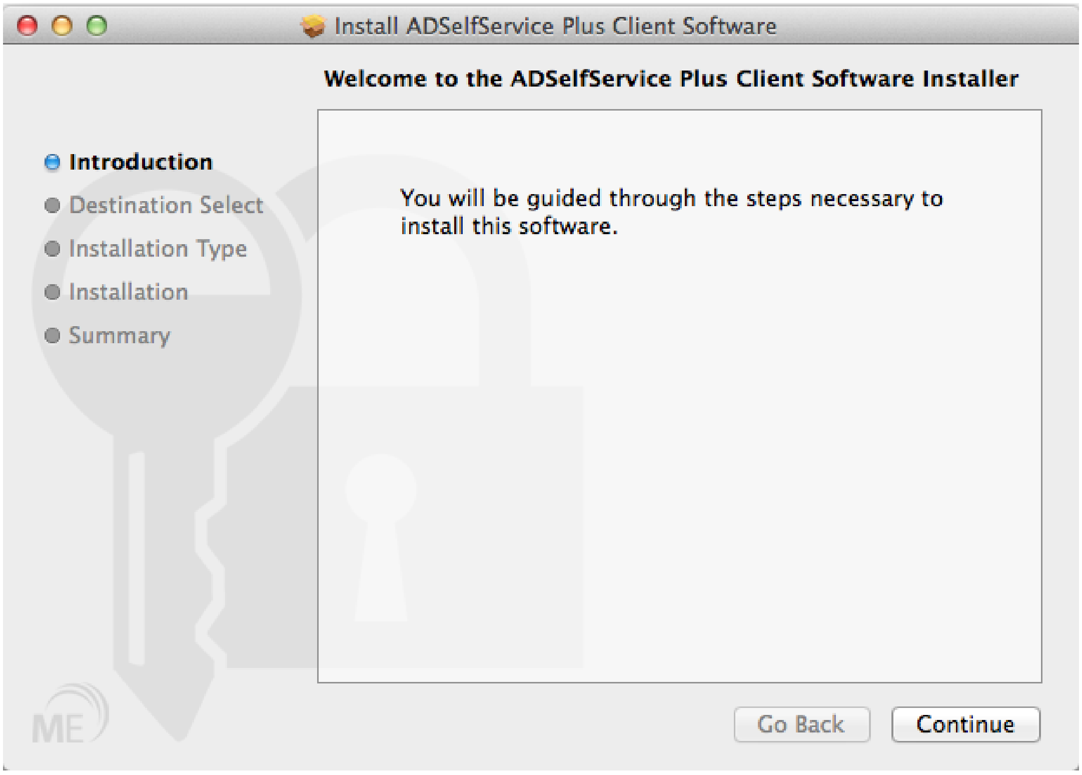
For Mac Clients:

ADSelfService Plus login agent for Mac OS X lets Active Directory domain users using Mac clients to reset their passwords and unlock their accounts from the OS X login screen itself. Please follow the steps given below to deploy the password self-service login agent to Mac clients:

Note: The ADSelfService Plus login agent for Mac supports clients running **OS X 10.6 and above**.

Installation Steps:

1. Locate the Mac OS X login agent for password self-service in ADSelfService Plus installation folder. It can be found at <install_dir>/bin/ADSelfServicePlusMacLoginAgent.pkg.
2. Copy the ADSelfServicePlusMacLoginAgent.pkg file to the Mac clients.
3. Double-click the ADSelfServicePlusMacLoginAgent.pkg file to begin the installation process.
4. In the Introduction window, click Continue

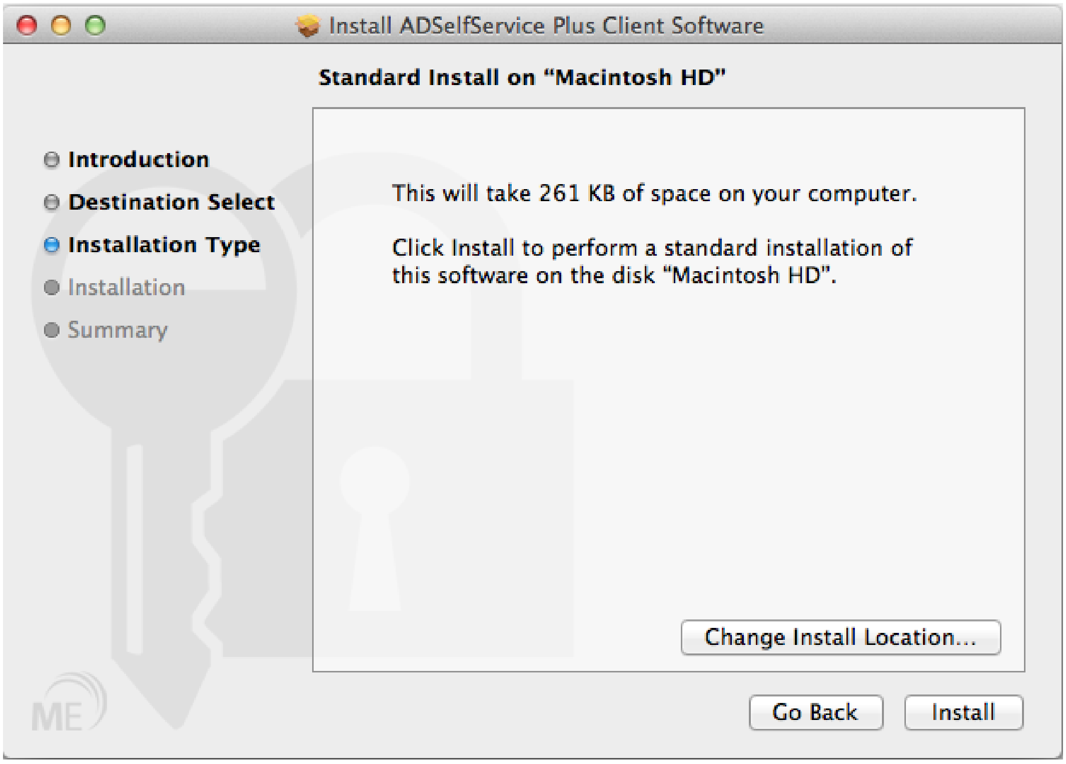


Install ADSelfService Plus Client Software

Welcome to the ADSelfService Plus Client Software Installer

You will be guided through the steps necessary to install this software.

5. In the Installation Type window, select the install location and click Install.



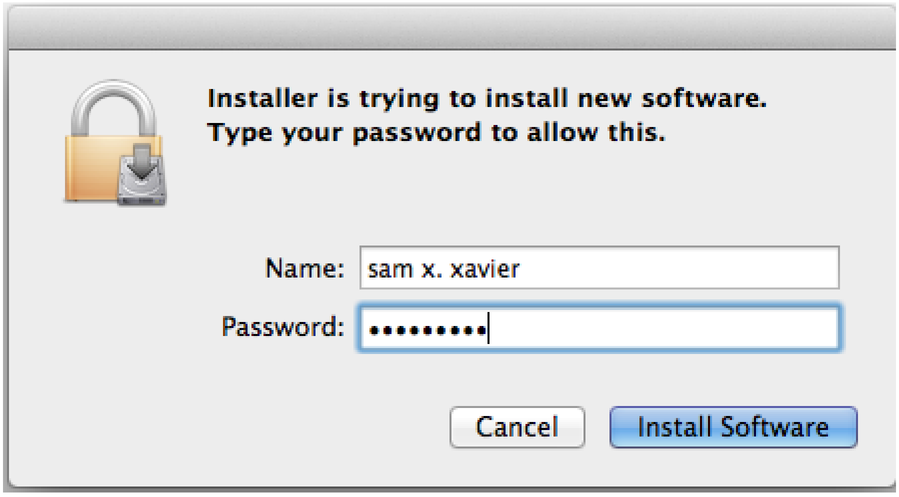
Install ADSelfService Plus Client Software

Standard Install on "Macintosh HD"

This will take 261 KB of space on your computer.

Click Install to perform a standard installation of this software on the disk "Macintosh HD".

6. After you click the Install button you will be asked to enter your username and password. Please use the account information you used to log on to your Mac.

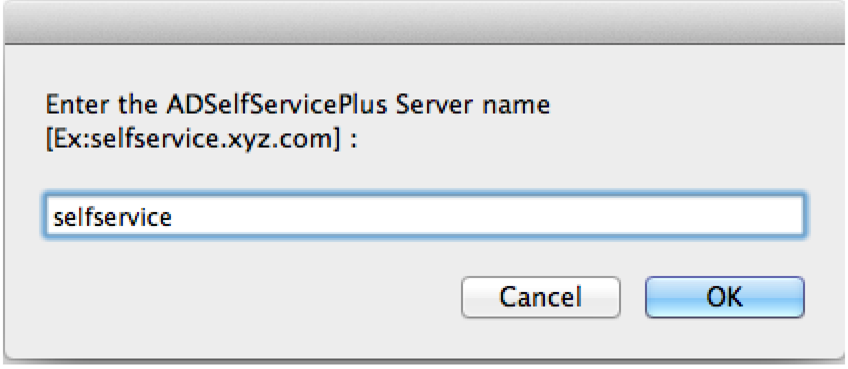


Installer is trying to install new software.
Type your password to allow this.

Name: sam x. xavier

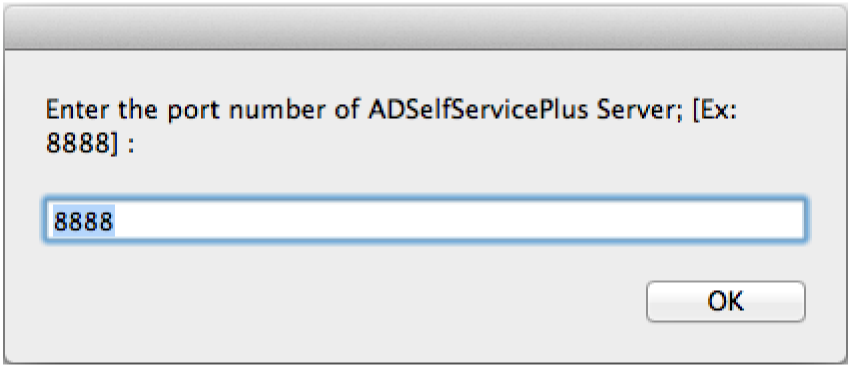
Password: ●●●●●●●●●

7. Enter the ADSelfService Plus server name and port number when prompted



Enter the ADSelfServicePlus Server name
[Ex:selfservice.xyz.com] :

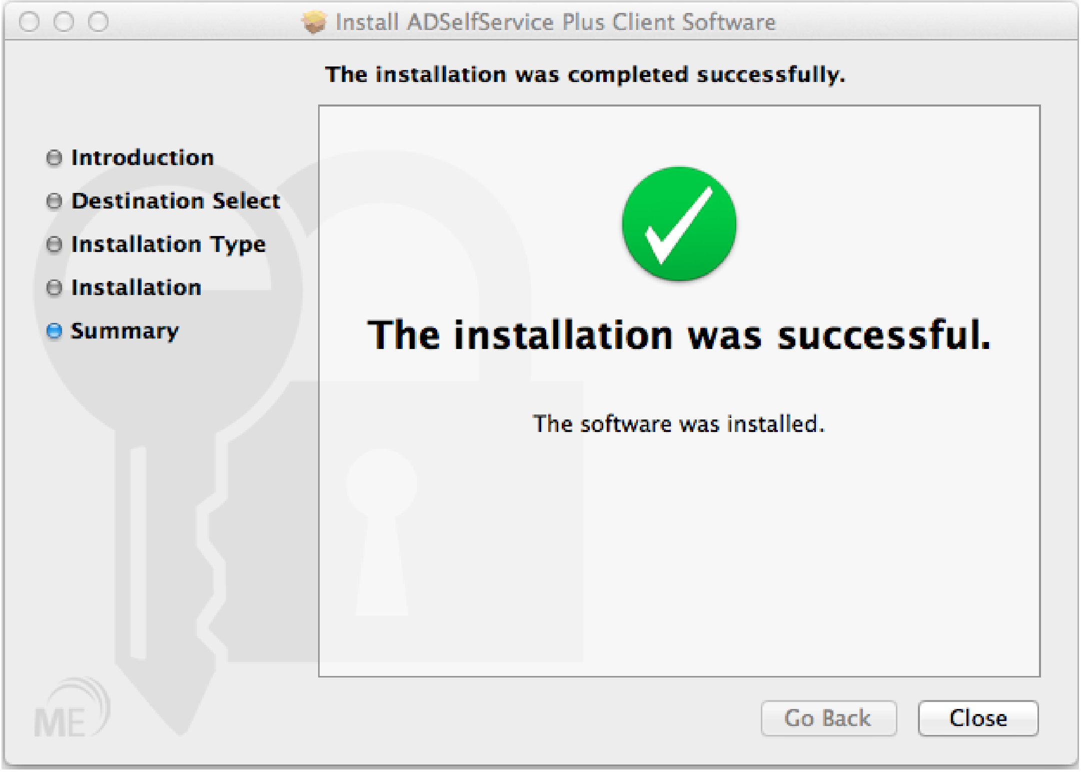
selfservice



Enter the port number of ADSelfServicePlus Server; [Ex:
8888] :

8888

8. In the Summary window, click Close to complete the installation.



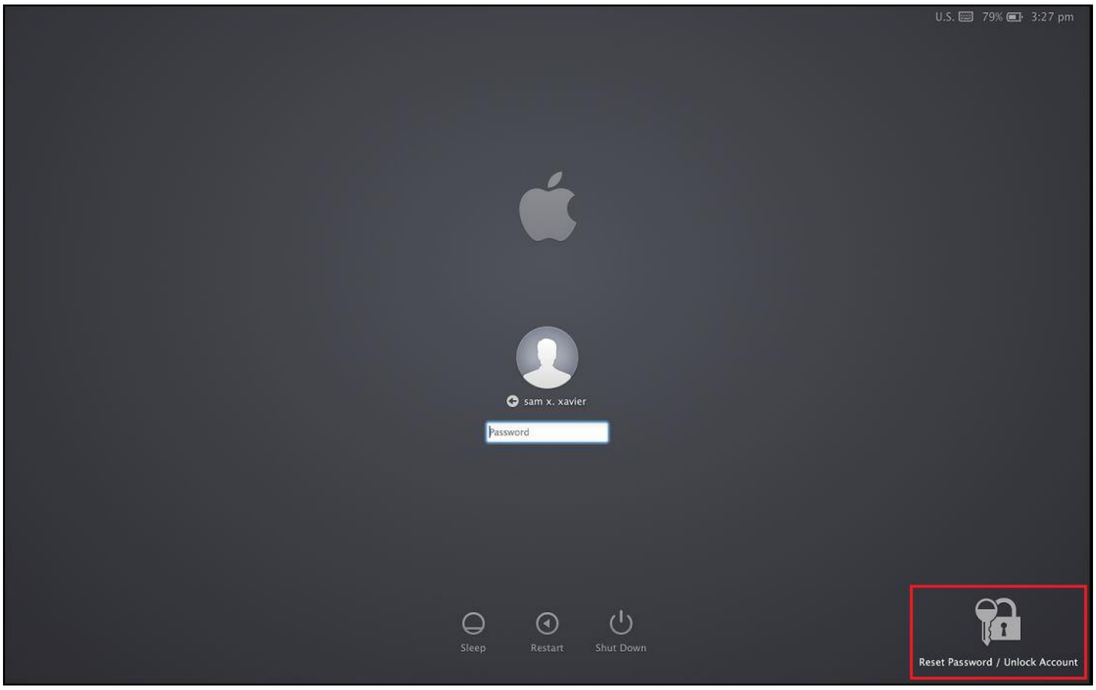
Install ADSelfService Plus Client Software

The installation was completed successfully.

The installation was successful.

The software was installed.

9. Once the installation is complete, a Reset Password/Unlock Account button will appear on the login screen.



Customization Steps:

This section describes how to customize the various features of the ADSelfService Plus's Mac OS X login agent. Features such as Server Name, Port Number, Button Text & Icon can be customized by editing the file config.plist stored in /Library/Application Support/ADSSPLoginAgent/. Follow the steps below to customize the login agent:

Steps to configure Server Name & Port Number:

1. Open Terminal
2. Run this script to change the server name: sudo /usr/libexec/PlistBuddy -c 'set :SERVERNAME 192.168.43.90' "/Library/Application Support/ADSSPLoginAgent/config.plist". Replace 192.168.43.90 with the server name or IP address of ADSelfService Plus server.
3. Please enter the username and password you used to log on to your Mac client when asked for user credentials.
4. Run this script to change the port number: sudo /usr/libexec/PlistBuddy -c 'set :PORTNUMBER 8443' "/Library/Application Support/ADSSPLoginAgent/config.plist". Replace 8443 with the port number of ADSelfService Plus.
5. Go to login screen and confirm the changes.

Steps to customize the Icon & Button Text:

1. Open Terminal
2. To change the icon, use this script: sudo /usr/libexec/PlistBuddy -c 'set :IMAGEPATH /Users/testuser/Desktop/sample-icon.png' "/Library/Application Support/ADSSPLoginAgent/config.plist". Replace the path to the image with the path to your own icon.
3. Please enter the username and password you used to log on to your Mac client when asked for user credentials.
4. To change the button text(Reset Password/Unlock Account text which will be displayed on the logon screen), use this script: sudo /usr/libexec/PlistBuddy -c 'set :BUTTONTEXT Forgot Password?' "/Library/Application Support/ADSSPLoginAgent/config.plist". Replace Forgot Password? with your own text.
5. Go to login screen and confirm the changes.

Note: In case, the specified icon source is not available default icon will be loaded.

Uninstallation Steps:

1. Open Terminal
2. Open /Library/PrivilegedHelperTools/
3. Del ADSSPLoginAgent
4. Go to login screen and confirm the changes.

Gina/Mac Customization

'GINA/Mac Customization' is a feature of ADSelfService Plus which assists you in revamping the 'GINA/Mac' layout based on your requirements. Using this feature,aspects like the 'Gina/Mac icon' and the 'Text on & above the Reset/Unlock button' can be customized.

Steps To Be Followed Inorder To Customize The Gina/Mac :

1. Click on 'Configuration -->Administrative Tools --> Gina/Mac (Ctrl + Alt + Del) --> Gina/Mac Customization'.
2. In the 'Frame Text' textbox,enter the 'appropriate text' (which will 'Direct the User' to click on the 'Reset/Unlock' button).The default text is '**Please Click On Reset/Unlock Button to reset/unlock your account with ADSelfService Plus'**.

   Note: 'Frame Text' is used only in Windows XP systems. It will not be visible in systems running Windows Vista and later OSs and Mac OS X.
3. Follow it up by 'Configuring the Text' for the '**Reset/Unlock Button'**(the text which will be displayed on the '**Reset/Unlock Button'**).
4. To select the 'Icon' for the 'Gina/Mac feature',click on 'Browse' & select the 'desired icon' (Only BMP files (with size 48 * 48) can be used as the 'Gina/Mac Icon')
5. Specify the 'Name of the Machine' where the ADSelfService Plus has been installed in the 'Server Name' textbox
6. Provide the 'Port Number' in the respective box.Declare the port number in 'HTTP' mode (also compatible with the 'HTTPS' mode)
7. Click on 'Save' to store the configured settings.

- Only the 'Future Gina/Mac Installations' will be affected by this 'Gina/Mac Customization' process
- For an already 'Deployed Gina/Mac',customization can be done with the help of the 'Gina/Mac Customization Scheduler'

Gina/Mac Schedulers:

The 'GINA/Mac Schedulers' is a feature of ADSelfService Plus using which you can create 'Schedulers' for the GINA/Mac 'Installation & Customization'.

'GINA/Mac Schedulers' are used to automate the 'GINA/Mac installation' process over a domain.During manual installation of GINA/Mac,it is possible that a few computers might be left uninstalled (due to some technical issues).To elude such sticky situations,the 'Scheduling' process is deployed - which ensures that all the computers within a domain get installed with the 'GINA/Mac' client software .

To re-configure an already deployed GINA/Mac,the 'Customization Scheduler' feature is used.

Steps To Be Followed Inorder To Configure The GINA/Mac Schedulers:

1. Select 'Configuration Administrative Tools --> Gina/Mac (Ctrl + Alt + Del) --> GINA/Mac Schedulers'
2. Click on the 'Edit' icon (inorder to alter the default settings of the 'GINA/Mac Installation (or) Customization' scheduler)
3. Select the 'Domain'(for which the Scheduler is to be configured)
   - For OU based selection,click on the 'Add OUs' link & Select the 'Desired OU(s)'
4. Set the 'Frequency for the Schedulers' Options available for scheduling are:
   - Daily
   - Weekly (specify the Day)
   - Monthly (specify the Date)
   - Hourly

   Select any one of the above mentioned options.
5. Set the 'Time' at which the 'Scheduling' would occur
6. Click on 'Save' to store the configured settings.

You can Enable/Disable the 'GINA/Mac scheduler' using the 'Enable/Disable' icon

Technician

Technician is a status that you can assign to the end-users. When a user is declared as a technician, then he will be provided with the rights to configure the various settings of the

ADSelfService Plus application.

This application allows you to configure technicians of two types:

- Super Admin.
- Operator.

Steps to Configure a Technician.

Advanced Role Permissions.

Super Admin:

When you declare an end-user as a Super Admin, then he will be provided with the full control over the entire application. A Super Admin has the right to re-configure the entire layout of the ADSelfService Plus.

Operator:

Declaring an end-user as the operator would provide him with the rights to perform the auditing operations for this application.

A Technician is provided only with the information that appertains to the domain to which he belongs.

Configuring Technician Settings

1. Select 'Configuration --> Administrative Tools --> Technician'
2. Click on 'Add New Technician' button
3. Choose the 'Domain' from the Drop Down box

4. In case of selecting 'Domains' other than the 'ADSelfService Plus' application:
   - Click on the 'Choose' link
   - Select the 'User' from the available list & click 'Ok'
   - Select the 'Role' for the 'Technician' (Super Admin/Operator)
   - Click on 'ADD'

The 'Technician' would be created. These technicians can logon using their 'Windows Logon' credentials.

5. In case of selecting the 'ADSelfService Plus' domain:
   - Provide the Login Name
   - Specify the Password & Confirm it
   - Select the 'Role' for the 'Technician'(Super Admin/Operator)
   - Click on 'ADD'

- The 'Technician' would be created. These technicians (ADSelfService Plus domain) are the ones who have no Active Directory accounts and therefore have to use the credentials that are configured by you.
- A message would be displayed stating that 'the technician was successfully created'.

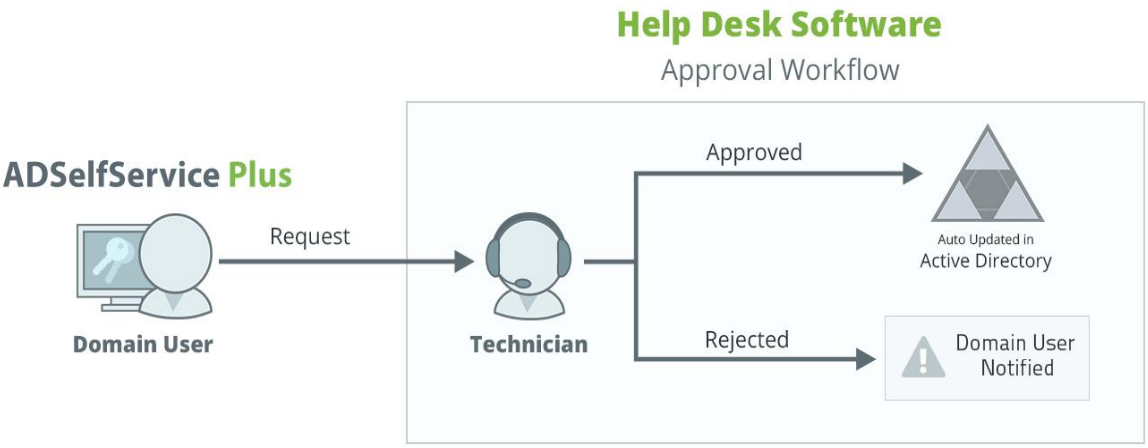
Advanced Role Permissions

Here you can further customize the technicians role by assigning them permissions to carry our certain operations. To do so, first select the role (Super Admin or Operator) and then select the permissions that you want to assign to that particular role. These permissions include the ability to:

- View 'Security Questions & Answers' report
- Disenroll users through 'Enrolled Users' report
- Delete users through 'Licensed Users' report

Self-Service Approval Workflow

By enabling the Self-Service Approval Workflow feature you can route self-service requests from end-users through your IT help desk for approval. Only after approval from the IT help desk, the self-service requests will be updated in Active Directory. This feature will help you take hold of users' self-service operations and maintain control over what details get updated in Active Directory. Refer the image below for better understanding:



Steps to integrate ADSelfService Plus with a Workflow Provider

Before you can enable this feature, you need to integrate ADSelfService Plus with a workflow provider such as ADManager Plus (our Active Directory Management and Reporting solution). The requests created by users from ADSelfService Plus can be managed and executed by your IT help desk staff using ADManager Plus.

Below are the steps for integrating ADManager Plus and ADSelfService Plus:

- Download, install and launch ADManager Plus.
- Now launch ADSelfService Plus and log in as an administrator.
- Go to **Admin --> Product Settings --> Connection**.
- Under **Configure Other ManageEngine Products** section, select ManageEngine ADManager Plus as the **Application Name**.
- Enter the **Server Name / IP Address** and **Port number** of ADSelfService Plus.

- Select the **protocol (http or https)** that is being used in ADManager Plus from the drop-down menu.
- Enter the **username** and **password** of ADManager Plus administrator account.
- Click **Test Connection** and **Save**.

Once integrated, you can enable Approval Workflow in ADSelfService Plus.

Steps to configure Self-Service Approval Workflow

- Launch ADSelfService Plus and log in as an administrator.
- Navigate to **Configuration --> Administrative Tools --> Approval Workflow**.
- Select **Enable Approval Workflow**.
- Now select which self-service actions should come under the approval workflow process from the available actions.
- Now, select the **policies** for which you want to enable approval workflow.
- Click **Save**.

Steps to configure Approval Workflow for Reset Password and Unlock Account Actions

If you have enabled approval workflow for reset password and account unlock actions, then you have to configure security questions. This will be used by the help desk technicians to verify end-users' identities before approving their actions. Follow the steps given below:

- Launch ADSelfService Plus and log in as an admin.
- Navigate to **Configuration --> Administrative Tools --> Approval Workflow**.
- Select **Enable Approval Workflow**.
- Enable Reset Password/Unlock Account option.
- Click **Configure**.
- In the dialog box that opens, you will see a list of security questions already configured by default.
- You can add, delete, edit, enable and disable the security questions as you wish.

- To add a new security question, click **Add Question** link at the bottom of the dialog box.
- **Enter the security question** and **select the corresponding LDAP attribute**. The value of the selected attribute will serve as the answer to the security question.
- Once you have configured the security questions, close the dialog box and click **Save**.

Since the answers (attribute values) to the security questions reside in Active Directory, **you must run the "All Users Report" in ADManager Plus** at least once after enabling approval workflow. This will pool all the existing values of the users' attributes and allow help desk technicians to review the users' answers to the security questions and approve them.

Security Center

As the name suggests, under this tab, you are provided with the features using which you can beef up the security of the end-user’s account.

Features available under this tab are mentioned below:

- Password Strengtheners
- Security Q & A Strengtheners
- Anti-Hacking System

Password Strengtheners

This feature provides you with a set of rules that you can impose onto the end-users while they configure their passwords. These rules are intended to increase the security of the user passwords.

Features:

- Enforce Password Strength Level
- Force Users To Change Password At Next Logon.
- Configuring Password Strengtheners

Enforce Password Strength Level :

As the name suggests, this feature apprizes the end-users of their password strength. It does so with the help of a feature by name Password Strength Analyzer.

While working with Password Strength Analyzer, you are granted with the option of choosing the password strength level from the list of available choices (strong, good, weak & too short)

Force Users To Change Password At Next-Logon:

Another way of securing a user's password is to force them to change it at regular intervals. A user would be required to change his password whenever he avails himself of the "Password Reset" service, that is, on his next logon into the application following the Password Reset operation.

Configuring Password Strengtheners

Password Strengtheners listed above can be configured by

1. Clicking on the "Advanced" icon against a Self-Service policy.
2. From the Pop-Up click on the "Reset & Unlock" tab

Security Q & A Strengtheners

Using this feature, you can secure the 'Security Q & A' process which serves for the purpose of user authentication. This feature offers you with a "set of self-explanatory rules" which can be imposed onto the user - in order to maintain the confidentiality of the user account - while he undertakes the Security Q & A process.

The rules under this feature are listed below:

- Prevent a user from providing the same answer to multiple questions
- Prevent a user from using any word of a question in their answers
- Display security questions one by one
- Display only a random subset from a user's security questions
- Make security answers case-sensitive
- Hide answers during reset/unlock operations

To Configure Security Question and Answer Strengtheners click here.

Anti-Hacking System

This feature is a compilation of several services which assist you in securing the user's account from various hacking threats. It does so by allowing you to impose a set of rules onto the user accounts that provide resistance against cyber-crimes, eaves-dropping or sneaking.

It offers you with the following services:

- Brute Force/Dictionary Attack Preventers.
- Man-In-The-Middle Attack Preventers.
- Safeguard Inactive-Account Loopholes.

Brute Force/Dictionary Attack Preventers:

"Guessing" is one of the easiest forms of hacking. So, in order to keep this malign craft at bay, ADSelfService Plus provides you with the following features:

- Block User Accounts Failing At Security Q &A
- Session Time-out
- CAPTCHA

Block User Accounts Failing At Security Q & A:

The probability of a user failing at the Security Q & A process is limited, as he would be well aware of the details provided by him.

As a protective measure against hacking, this feature blocks users who fail the Security Q & A test for a definite time period (the ideal value being 5 attempts but can be changed to any desired value; as there is always a possibility of a user forgetting his Security Q & A details). To Block User Accounts Failing at Security Ques and Ans Click here.

Session Time-out :

Password Reset & Account Unlock are two very delicate tasks which should be carried out with utmost care. To do so, this feature helps you to preclude any leak out of confidential user information by allowing you to set a time limit for the "Password Reset/Unlock Account" sessions, thus preventing any "user idle time".

Whenever the user happens to exceed the time limit set for performing the 'password reset or unlock account task', the whole process will get locked out & the user has to start all over again. To Configure Session Time-Out click here.

CAPTCHA :

More popularly known as the word verification image, this feature when enabled would help you to beef up the security of the user. To Configure CAPTCHA feature click here.

Man-In-The-Middle Attack Preventers

Whenever a transaction happens between two extremities, the possibility of some source getting hold of the information while on its way to its destination is huge. To avoid such incidents, this application provides you with two features that are listed below:

- E-mail Notification Upon Password Self-Service
- Secure Connections

Safe-Guard Inactive Account Loopholes

Inactive accounts have always been a nuisance while managing user accounts. You cannot discard the information pertaining to these inactive accounts since there is always a possibility of these users returning back to the application.

Maintaining such inactive accounts might lead to various problems with the issue of 'License Management' topping the list.

To counteract the problems that arise from the such Inactive User Accounts,the ADSelfService Plus application provides you with a feature by name 'Restrict Inactive Users'.

Restrict Inactive Users:

Using this feature,you can strip the licenses of the Inactive Users and provide it to the newly added accounts of this application.

Besides effective License Management,this feature provides you with the option of 'restricting inactive users' from logging into this application.

ADSelfService Plus brings about the process of 'restricting inactive users' without discarding the information pertaining to their accounts. For more on Restricting Inactive Users and its configuration click here.

This application provides you - the administrator - with the rights to change the status of these 'Inactive Accounts'.

Admin

Under this tab,you are provided with features via which you can configure the settings of the ADSelfService Plus to suit your requirements.

The features available under this tab are:

- **Customize:** Configure an environment of your own within this application using the features available under this option
- **System Utilities:**Provides you with features necessary for the functioning of ADSelfService Plus application.
- **Product Settings**:Configure the settings of the ADSelfService Plus application via this feature
- **License Management:** Manage user licenses effectively with the help of this 'License Management' feature.

Customize

Under this tab,you are provided with features using which you can customize the various settings of the ADSelfService Plus application .

The 'Customize' tab hosts three different features:

- Logon Settings
- Re-branding
- Personalize

Logon Settings

As the name suggests, the 'logon settings' feature of the ADSelfService Plus assists you in configuring the logon page of this application.

By default, the ADSelfService Plus application provides you with two different modes of logging into this application:

- As an Administrator &
- As an End-User

- You - as the administrator - get to decide whether the end-users would be availed with the 'Admin Login' option.
- In any case, it is advisable to prevent the end-users from making use of the 'Admin Login' portal. (By enabling the 'Hide Self-Service Admin Login' option. For further details see 'Configuration').
- Enabling the 'Hide Self-Service Admin Login' option requires you to specify the 'url(s)/DNS names' that would be allowed to access the admin portal in the 'Make Admin Login Page Accessible Only from' textbox

Features:

- Customizing the End-User Logon Page
- Single Sign-On
- Login CAPTCHA
- Multiple Login Option

Customizing The End-User Logon Page:

As an administrator, you are provided with the rights to customize the logon page of the end-users. To do so, click on the 'Customize User Logon Page' link available under this 'Logon Settings' feature.

Configuration:

1. Click on Logon Settings (Admin --> Customize --> Logon Settings)
2. Enable the 'Hide Self-Service Admin Login' checkbox.
3. Select the 'Show CAPTCHA (Word Verification Image) on Login Page' option if you want users to be verified through CAPTCHA. You can enable CAPTCHA on the admin and end-user login pages, and also in the Reset Password and Unlock Account pages.
4. Check the 'Single Sign-On' option
5. Enable the 'Show Log Onto' option in order to allow the end-users to select the domain to which they belong.(This option is required in the case of ADSelfService Plus lodging multiple domains)
   - While selecting the 'Show Log Onto' option, you are provided with the choice of setting the 'Select Domain' as the 'default value' in the 'Show Log Onto' drop-down box.
   - To do so, enable the 'Show Select Domain As The Default Value' checkbox

5. Click on 'Save' to store the configured settings.

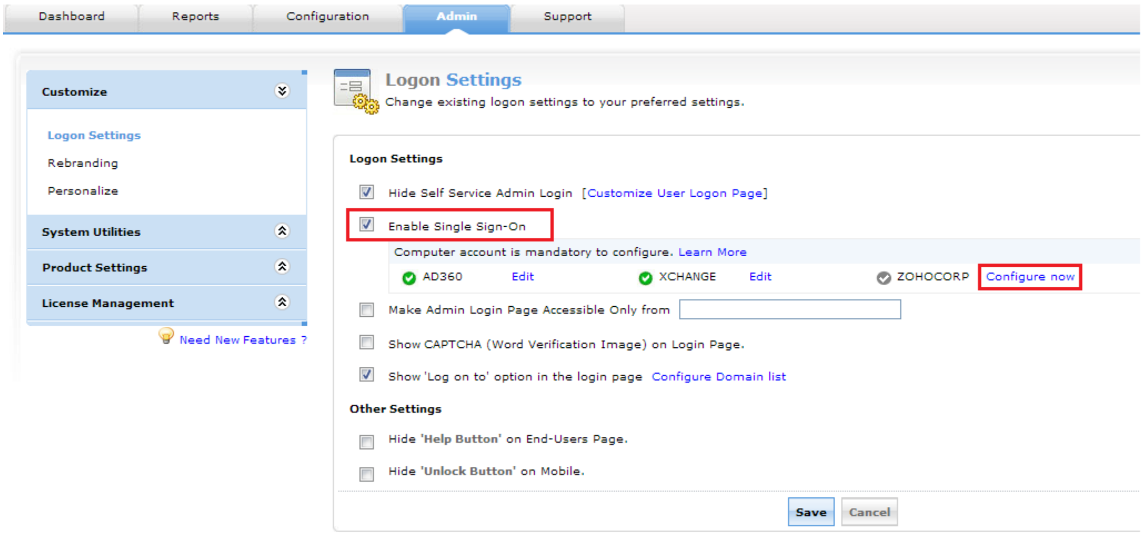
Single Sign-On :

Enable the end-users to login into this ADSelfService Plus application using their respective domain credentials instead of configuring a new set of login credentials.

Strengthening Single Sign-On using NTLMv2:

As we saw before, Single Sign-On (SSO) enables end-users to log into ADSelfService Plus application using their respective domain credentials. To make the Single Sign-On process more secure, ADSelfService Plus supports NTLMv2, a security protocol that provides authentication, integrity, and confidentiality to users.
Here’s how you enable NTLMv2:

1. Enable **Single Sign-On**. You will see a list of domains that have been configured with ADSelfService Plus for self-service.
2. Click the **Configure Now** link of a domain for which you want to enable NTLMv2 authentication.



Logon Settings

Change existing logon settings to your preferred settings.

Logon Settings

☑ Hide Self Service Admin Login [Customize User Logon Page]

☑ Enable Single Sign-On

Computer account is mandatory to configure. Learn More

AD360 Edit XCHANGE Edit ZOHOCORP Configure now

□ Make Admin Login Page Accessible Only from

□ Show CAPTCHA (Word Verification Image) on Login Page.

☑ Show 'Log on to' option in the login page Configure Domain list

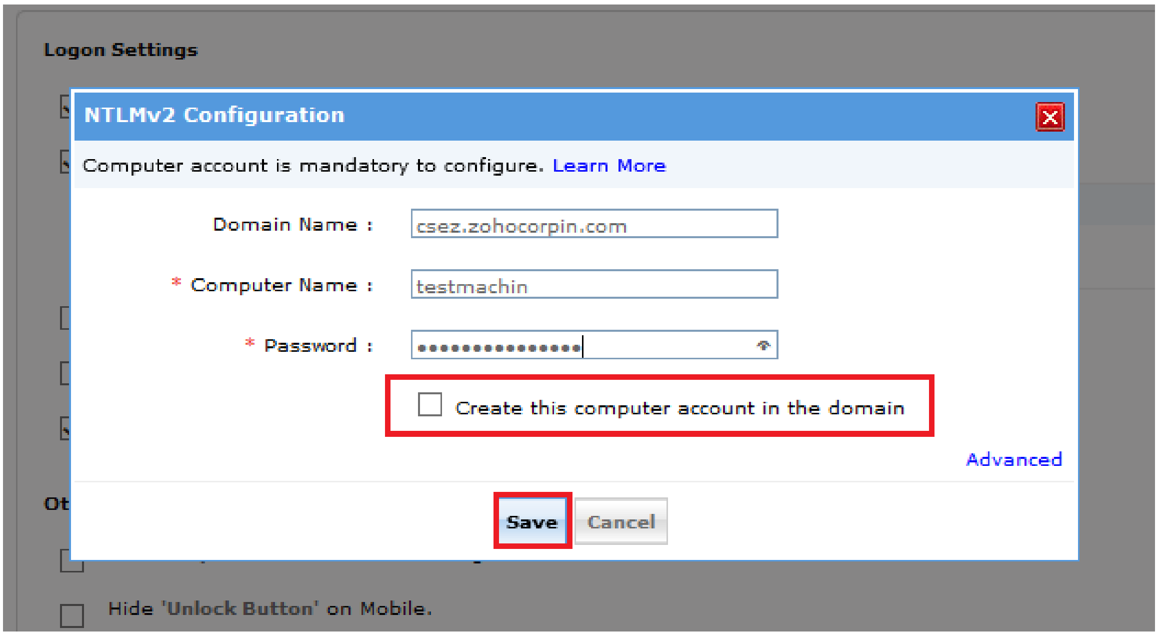
Other Settings

□ Hide 'Help Button' on End-Users Page.

□ Hide 'Unlock Button' on Mobile.

Save Cancel

3. To use the NTLM security provider as an authentication service, a **computer account has to be created** in Active Directory with a specific password which meets the password policy in Active directory. **This computer account should not be associated with any physical computer in your network.**
4. If you already have such a computer account, enter its **name** and **password** in the fields provided.
5. If not, then enter a computer **name** and **password** of your choice, and select the option '**Create this computer account in the domain**'
6. Click **Save** to finish.



Logon Settings

NTLMv2 Configuration

Computer account is mandatory to configure. Learn More

Domain Name : csez.zohocorpin.com

* Computer Name : testmachin

* Password : •••••••••••••••

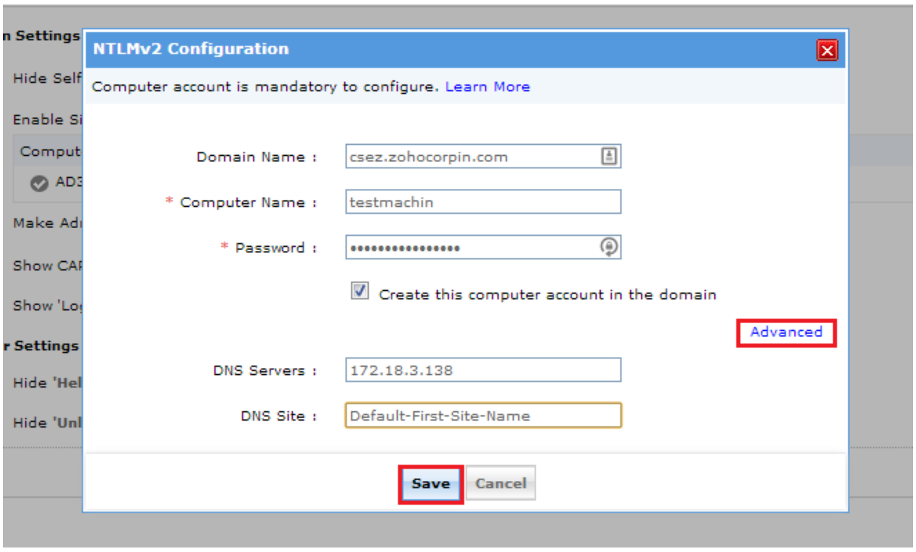
□ Create this computer account in the domain

Advanced

Save Cancel

□ Hide 'Unlock Button' on Mobile.

7. In case you've installed ADSelfService Plus in a machine that does not belong to the domain you have chosen, click **Advanced** and specify the **DNS Server** and **DNS Site** of the domain you have chosen before saving the settings.



NTLMv2 Configuration

Computer account is mandatory to configure. Learn More

Domain Name : csez.zohocorpin.com

* Computer Name : testmachin

* Password : ••••••••••••••••

☑ Create this computer account in the domain

Advanced

DNS Servers : 172.18.3.138

DNS Site : Default-First-Site-Name

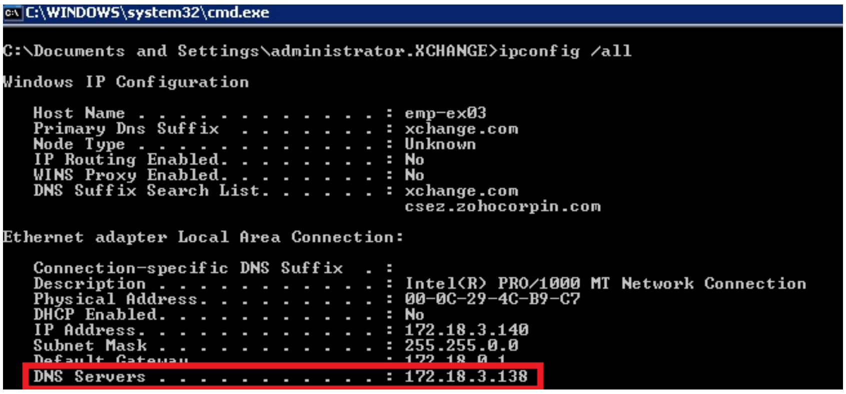
To identify the DNS Server IP address:

- Open Command Prompt from a machine belonging to the domain that you have selected
- Type ipconfig /all and press enter
- Use the first IP address displayed under DNS Server

To identify the DNS Site:

- Open Active Directory Sites and Services in Active Directory
- Expand the Sites and identify the Site in which the Domain Controller configured under the selected domain appear
- Use the Site name for DNS Site

See the images below for reference.


C:\WINDOWS\system32\cmd.exe

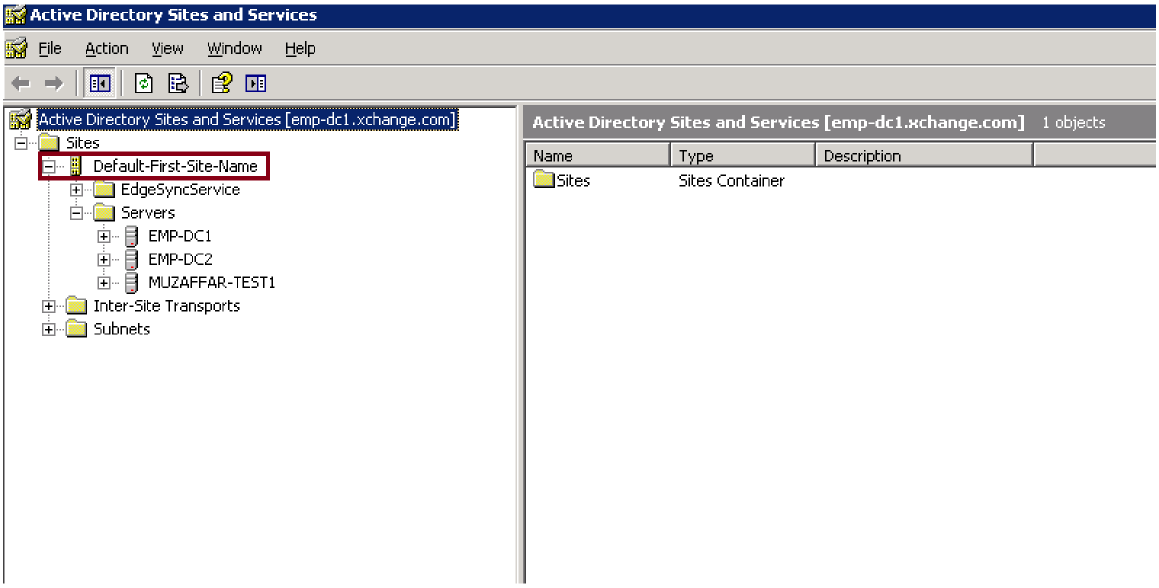
```
C:\Documents and Settings\administrator.XCHANGE>ipconfig /all

Windows IP Configuration

   Host Name . . . . . . . . . . . . : emp-ex03
   Primary Dns Suffix  . . . . . . . : xchange.com
   Node Type . . . . . . . . . . . . : Unknown
   IP Routing Enabled. . . . . . . . : No
   WINS Proxy Enabled. . . . . . . . : No
   DNS Suffix Search List. . . . . . : xchange.com
                                       csez.zohocorpin.com

Ethernet adapter Local Area Connection:

   Connection-specific DNS Suffix  . :
   Description . . . . . . . . . . . : Intel(R) PRO/1000 MT Network Connection
   Physical Address. . . . . . . . . : 00-0C-29-4C-B9-C7
   DHCP Enabled. . . . . . . . . . . : No
   IP Address. . . . . . . . . . . . : 172.18.3.140
   Subnet Mask . . . . . . . . . . . : 255.255.0.0
   Default Gateway . . . . . . . . . : 172.18.0.1
   DNS Servers . . . . . . . . . . . : 172.18.3.138
```


Active Directory Sites and Services
File Action View Window Help
Active Directory Sites and Services [emp-dc1.xchange.com]
Sites
Default-First-Site-Name
EdgeSyncService
Servers
EMP-DC1
EMP-DC2
MUZAFFAR-TEST1
Inter-Site Transports
Subnets
Active Directory Sites and Services [emp-dc1.xchange.com] 1 objects
Name
Type
Description
Sites
Sites Container

Login CAPTCHA:

Enabling this setting will display a CAPTCHA image on the login page. End-users must enter the text shown in the CAPTCHA image in order to login to the self-service portal. Login CAPTCHA serves as a security measure against bot-based brute force attacks.

Steps to configure login CAPTCHA:

1. Click on **Logon Settings (Admin --> Customize --> Logon Settings)**
2. Select the option **Show CAPTCHA (Word Verification Image) on Login Page**.
3. You can choose to enable captcha for the **admin and domain user login page** and **reset password and unlock account login page**.
4. Click **Captcha Settings** link. Here you can configure whether to show captcha every time or only after a certain number of invalid login attempts.
5. Select the option **'Show CAPTCHA after...'** to enable captcha only after a certain number of invalid login attempts. Enter the number of invalid login attempts allowed and the time (in minutes) to reset the invalid login count.
6. Select the option **'Show captcha every time'** to display captcha every time someone tries to login to the product.
7. Click **Save**.

Multi login Option:

By default, users can log in to ADSelfService Plus by entering their username and password. Alternatively, you can allow users to log in to ADSelfService Plus using their mobile number, email or any AD attribute which has a unique value in place of their username.

Steps to configure multi login option:

8. Click on **Logon Settings (Admin --> Customize --> Logon Settings)**
9. Check the **'Enable other unique attributes to login into the product'** checkbox.
10. Click **'Select Attribute list'** link to select the AD attributes that can be used by end-users for logging in to ADSelfService Plus.
11. By default, you have 3 attributes to choose from: i) mail ii) telephoneNumber and iii) userPrincipalName
12. You can also add other AD attributes with unique values by entering the attribute's LDAP name in the **'Add Attributes**' box.

    Note: Make sure that you choose an attribute whose value is unique across the domain. E.g.: sAMAccountName, email, telephoneNumber.
13. Click **'Save'** to finish.

IMPORTANT:

The following conditions must be considered while enabling multiple login option:

1. If two users have the same value for any of the log in attribute, then both users will not be able to log in.
2. Attributes that have multiple data types as value like objectGUID, distinguishedName, etc., cannot be used as a log in attribute.

Customize User Logon Page

Using this feature of ADSelfService Plus,you can customize the user logon page.The process of customization is brought about using the "drag and drop" method.

This feature comprises of two different fields.They are:

- Pre -Defined Field
- Custom Field

Pre-Defined Field:

These are the default elements that are provided to you (admin).There are five different fields available.

- Reset Password
- Unlock Account
- Enrollment
- Change Password
- Self Update

Operations That Can Be Performed On The Pre-Defined Elements:

Though the Pre-Defined elements are default ones,you have the right to 'edit or delete' these options from the user logon page.To modify the pre-defined elements,you are provided with the following options:

- EDIT **-** Clicking on ✏ icon - which appears on mouseover the pre-defined element - would pop up a dialog box via which you can edit the contents of these pre-defined elements
- DELETE - Click on the ✗ icon in order to delete the predefined elements from the user logon page.

The deleted element can be re-enabled by clicking and dragging the same from the 'Pre-Defined Elements Area' available on the left side of the Logon Page Customizer**.**

Custom Field:

You can add new attributes onto the user logon page using this custom field. The elements that can be added are

- Text
- Link
- Image
- Horizontal Line
- Vertical Line

To view the working of the above mentioned options, click "CUSTOM FIELD ATTRIBUTES"

User Logon Dialog Box:

Just as you can reposition various fields on the user logon page,you can also re-map the 'user logon box'.Moving the mouse pointer over this dialog box enables "Hide" button,which when clicked leads to another dialog box.

The newly popped-up dialog box contains "Keep The Logon Form Hidden By Default" checkbox. Checking this option would disable the user logon box.

Enabling The User Logon Box:

To enable the User Logon Box ,click on 'Show' icon (which appears when the logon box is in a disabled state).

Steps Involved In Configuring The User Logon Page:

1. Click on "Customize User Logon Page" link on the 'Logon Settings' page (Admin --> Customize --> Logon Settings)
2. Drag and position the "Pre Defined Elements" in the desired locations
3. Click on "Custom Fields" and add the fields of your choice from the options available.
4. Click on "Preview This Settings" to view the page before being saved
5. Hit the "SAVE" button to save the configured settings.

CUSTOM FIELD ATTRIBUTES:

ADD TEXT ATTRIBUTE:

Using this attribute you can add (as well as format) the text on the user logon page.Clicking this option would pop up a window via which you can configure the text to be displayed on the user logon page.

ADD LINK ATTRIBUTE:

Create links to other web pages with the help of this Add Link Attribute. Clicking on this option would pop up another window which contains the following two fields:

- Name - specify the name of the web site
- Target URL - mention the URL of the page (which is to be linked)

ADD IMAGE ATTRIBUTE:

Add images onto the 'User Logon Page' with the help of this 'Add Image Attribute'.

ADD LINE:(Horizontal & Vertical)

Using this 'Add Line' option,you can add lines onto the 'User Logon Page'. T**he lines that you create can be moved as well as resized as you desire.**

Rebranding

"Rebranding" is a feature using which you can customize the ADSelfService Plus display settings "based on the environment" in which it is deployed.

Steps Involved In Configuring The "Rebranding" Feature:

1. Click on 'Rebranding' (Admin --> Customize --> Rebranding)
2. Browse and Select the desired image (logo for your application) via "Change Image/Logo" field
3. Select the "Desired Color" from the "Change Theme Color" field
4. Pick the "Font Style" from the "Font Family" drop down box
5. Select the "Font Size" from the "Font Size" drop down box
6. Specify an appropriate 'Browser Title'
7. Choose the 'Browser Title Image'
8. Enable the "Customize Password Policy Messages" checkbox to re-configure the standard "Domain Password Policy" regulations (displayed in the pages that a user goes through while "resetting/changing" his password)

This process of re-configuring can be done by editing the "html" file found at the location specified below:

<installation_directory>\webapps\adssp\html\<your_domain_name>_PasswordPolicy.html

To restore the 'Default Domain Policy' settings,disable the 'Customize Password Policy Messages' checkbox & click on the 'Update Domain Objects' button (Refresh Icon) in the Domain Settings feature.

9. Hit the "SAVE" button to store the configured settings

Change Image / Logo for Admin Users:

An administrator can replace the default ADSelfService Plus logo with his corporate logo or an image of his choice. The modified image present at the top left corner of the Application will then be viewed by all Self-Service Users.

To replace the default ADSelfService Plus logo

1. Login ADSelfService Plus
2. Click on the "Admin Tab"
3. Click on "Rebranding"
4. Click on "Browse" and provide a check against the "Change Image / Logo" box provided and select your corporate image or logo.
5. Click on "Save" to save the changes.

Customize messages at Reset Password /Unlock Account pages

An Administrator can customize the header and footer messages on one or all pages in ADSelfService Plus, directing a user to perform a password reset (Using "Forgot your Password" link) or account unlock (Using "Unlock your Account" link). Customization of header and footer is done by providing links, or text messages within a HTML Table element.

To customize the Header and Footer Messages in one or all the pages edit the file "CustomLayout.txt" from the location provided below,

<installation_directory>\webapps\adssp\html\

Each page directing to Password Reset or Unlock Account has different names as described below.

"url-reset" : "Reset Your Password" Page where users enter their name & select their domain. Enter your text messages in the file "CustomLayout.txt" within the open and close Tags provided below.

<url-reset-header>Enter Message or Link </url-reset-header>
<url-reset-footer> Enter Message or Link </url-reset-footer>

"url-validateuser" : "Security Questions" Page where users answer secret questions. Enter your text messages in the file "CustomLayout.txt" within the open and close Tags providded below.

```
<url-validateuser-header> Enter Message or Link </url-validateuser-header>
<url-validateuser-footer>Enter Message or Link  </url-validateuser-footer>
```

"url-resetpassword" : This is the Page which provides "Domain Password Policy requirements" for users when Password Reset / Unlock Accounts. Enter your text messages in the file "CustomLayout.txt" within the open and close Tags providded below.

```
<url-resetpassword-header> Enter Message or Link </url-resetpassword-header>
<url-resetpassword-footer> Enter Message or Link </url-resetpassword-footer>
```

"url-resetresult" : This page shows the status of a "password reset" or "account unlock". Enter your text messages in the file "CustomLayout.txt" within the open and close Tags provided below.

```
<url-resetresult-header>Enter Message or Link  </url-resetresult-header>
<url-resetresult-footer> Enter Message or Link </url-resetresult-footer>
```

Example:

```
<url-reset-header>
<table>
<tr>
<td class = "blacktxt">Enter your text message</td>
</tr>
</table>
</url-reset-header>
```

(Note: Save a BackUp copy of the existing file CustomLayout.txt before editing.)

Personalize

ADSelfService Plus offers you with a feature by name 'Personalize' using which you can modify the settings of this application to suit your requirements.In other words,you can create your own environment within this application via this 'Personalize' feature.

Features:

This feature:

- Allows you to change the 'default login credentials' provided to you by this application at the time of purchase.
- Allows you to view this application in the language that you prefer.
- Lets you to set the 'time zone' of your choice
- Lets you to choose the 'Date' & 'Time' formats as per your requirements.

Configuration:

Changing The Logon Credentials:

1. Enter the 'Old Password' in the specified box.
2. Follow it up with the 'New Password' & confirm the same in the succeeding field.

Creating An Enviroment Of Your Own Within ADSelfService Plus:

1. Choose the 'language' that you desire
2. Select the 'Time Zone'
3. Choose the 'Date & Time' formats
4. Click on 'Save' to store the configured settings

System Utilities

Under this tab,you are provided with the features via which you can 'update' as well as 'secure' the settings of the ADSelfService Plus application.

The features listed under this tab are:

- Dashboard Updater
- Automatic DB Backup
- Site Based DC

Dashboard Updater:

Update the dashboard of the ADSelfService Plus application with the help of the Dashboard Updater feature available under the System Utilities tab. Besides dashboard updation, this tab also provides you with the option of synchronizing ADSelfService Plus with your organization's Active Directory.

Features available under this tab

- AD Synchronizer.
- Locked Out Users.
- Password Expired Users.
- Soon-To-Expire User Passwords.

All the above mentioned features can be updated via this "Dashboard Updater" feature .

The updation is brought about by configuring 'schedulers at regular intervals' which perform the task of updating the features available under this tab.

> You are also provided with the option of editing the schedulers that bring about the updation process. To do so, click on the 'Edit' icon.

AD Synchronizer

The AD Synchronizer synchronizes the ADSelfService Plus database with your Organization's Active Directory. Scheduling ADSelfService Plus synchronization with your organization's Active Directory helps in the update of Application dashboard reports.

Users will be able to view an updated Dashboard and latest reports from the Active Directory.

The Synchronization is based on the Schedule frequency which is editable and displayed on the Table.

To modify the Schedule Frequency:

1. Click on "Admin" Tab -->>"Dashboard Updater"
2. From the Actions column of the "Dashboard Updater" table click on the ✏ edit icon.
3. This Pops-Up the "AD Synchronizer" where you can set the "Schedule Duration"
4. The "AD Synchronizer" schedules a report depending on any of the frequency listed below based on User selection.
    1. **Daily** - A Report will be scheduled once a day at the time selected.
    2. **Weekly** - A report will scheduled once a week on "selected day from Drop Down menu" at "Selected time of that Day"
    3. **Monthly** - A report will be scheduled once every month at a "selected time from drop down menu" on a "selected date from drop down menu"
    4. **Hourly** - A report will be scheduled once in every "selected from drop down menu" hours.

> The "Dashboard Updater" table lists the "Schedule Frequency" and the Schedule for the "Next Run". Any fresh data updated in Active Directory will be synchronized with ADSelfService Plus at the time displayed under the "Next Run" column.

Locked Out Users

From the "Actions" column of the "Dashboard Updater" table, click on the ✏ edit icon to schedule an update of the ADSelfService Plus dashboard. The dashboard will display the latest data about Locked-Out Users.

Password Expired Users

From the "Actions" column of the "Dashboard Updater" table, click on the ✏ edit icon to schedule an update of the ADSelfService Plus dashboard. The dashboard will display the latest data about Password Expired Users.

Soon-To-Expire User Passwords

From the "Actions" column of the "Dashboard Updater" table, click on the ✏ edit icon to schedule an update of the ADSelfService Plus dashboard. The dashboard will display the latest data about Soon-to-Expire User Passwords.

Automatic DB Backup

As a proactive measure against the loss of data,the ADSelfService Plus application provides you with a feature by name Automatic DB Backup.This feature assists you in creating 'schedulers for data backups' at regular intervals,thereby precluding any chance of losing data.

Configuration:

1. Select the frequency (daily,weekly,monthly or hourly) for scheduling.
   - In case of selecting the Weekly (or) Monthly option,you have to specify the 'time' & 'date' at which the scheduling will take place.
   - In case of selecting the Daily (or) Hourly option,you have to specify the 'time' at which the scheduling will take place
2. In the 'Back-up Storage Path' text box,provide the path name for these 'Back-Up' files.
3. Click on 'Save' to store the configured settings.

If the specified path is wrong or unavailable, the database will be stored in the default backup folder under the product installation directory

Site Based DC

Site Based DC is a nifty feature in ADSelfService Plus that will ensure the changes made by end-users through self-service are updated in Active Directory without any delay. In Site Based DC, you assign a particular set of Domain Controllers to an OU. When a user from that OU resets his password or self-updates his profile information using ADSelfService Plus, the data is quickly updated in the DCs assigned to that OU, in the same order, as configured under Site Based DC settings.

Configuring Site Based DC

- Navigate to "Admin" Tab --> "System Utilities" --> "Site Based DC"
- Select a domain from the drop-down menu. You will see a list of OUs and domain controllers belonging to that domain
- Select an OU to see the list of DCs that are assigned to that OU.
- Click "Select More DCs" to add or remove DCs from the list
- Click on the Up/Down arrow buttons at the top right corner to choose the order in which the DCs will be updated. The first DC in the list will be updated first.
- Select the option "Inherit to Child OUs" to apply the settings of parent OUs to child OUs.
- Click "Save"

Product Settings

This tab offers you with features via which you can establish the software settings of the ADSelfService Plus application.

The utilities available under this tab are:

- Connection
- Server Settings
- Windows Service

Connection

The 'Connection' feature is used to configure the 'Port Settings' of the ADSelfService Plus application. It is also used for 'establishing connections' with other 'Manage Engine' products.

- Configuring Port Settings
- Establishing Connection with other ManageEngine Products

Configure The Port Settings

Steps to be Followed In-order To Configure The Port Settings :

1. Click on 'Connection' (Admin --> Product Settings --> Connection)
2. Specify the 'Default Port Number'(8888) (OR) Specify the 'Port Number' - of your choice- in the respective box provided
3. Check the 'Enable SSL Port' checkbox for 'safe transfer of data' via encryption (Click on **'SSL Certification Tool'** for further details)
4. Check the 'Enable LDAP SSL' checkbox (for secure communication between Active Directory & ADSelfService Plus)
5. Select the 'Session Expiry Time' - time for which the user session would last - from the drop-down box
6. Click on 'Save' to store the configured settings

Configuring Access URL:

In case you have hosted ADSelfService Plus over the internet or behind a proxy server, you can configure access URL to provide end-users with access to ADSelfService Plus. Clicking on the access URL will take users to ADSelfService Plus. Here's how you can configure access URL:

1. Click 'Configure access URL' link
2. Enter the 'Server Name', 'Protocol' and 'Port Number'
3. Click 'Save'
4. Establish Connection with other ManageEngine Products:

Steps to be Followed to establish Connection with other ManageEngine Products:

1. Enter the 'Server Details'
   - The 'Application Name' (with which the connection is to be established)
   - The 'Server Name'(the 'Manage Engine Product Installed Machine' which is to be connected)
   - The 'Port Number' of the 'Server'
   - Configure the 'Protocol'(http/https)
2. Under the 'Authentication Details' option enter
   - The 'Login Name' &
   - The Password

3. Click on 'Test Connection' (to test the 'Established Connection') & then click 'Save'

Entrusting 'SSL Certification' with SSL Certification Tool

Entrusting this 'SSL Certificate' upon an ADSelfService Plus ensures 'safe transfer of data' between this application & various others.

The SSL Tool brings about data security via 'encryption' process.

This page provides you with the 'Guidelines for Installing the SSL certificate' along with a 'CSR Generator form'.

Guidelines For Installing The SSL Certificate On The ADSelfService Plus Application:

Installing the 'SSL certificate onto the ADSelfService Plus' application is a 'three-step process':

1. SSL Certficate Request
2. Generating The Keystore File &
3. Embedding the SSL Certificate With ADSelfService Plus

SSL Certificate Request:

Before requesting for a certificate from any certifying authority,one needs to create a tomcat specific **'.csr file'** & a '**.keystore file**'.These two files should be named as '**selfservice.csr'** & '**selfservice.keystore'** respectively.

Generating The 'csr' file:(with the help of the 'CSI GENERATOR' form)

Steps To Be Followed:

1. In the 'Common Name' textbox,provide the 'domain name' for accessing the 'Server'(eg. www.example.com)
2. Specify the 'Organizational Unit'(OU) in the respective textbox provided

3. In the 'Organization' textbox,provide the 'Legal Name' of your organization.
4. Specify the 'City'(in which your organization is located) in the textbox provided
5. Mention the 'State/Province' (in which your organization is located) in the respective textbox provided
6. Provide the 'Country Code'(of the country where your organization is located)
7. In the 'Password' textbox,specify the 'Password'(minimum 6 characters in length) that you will be asked while installing the certificate

Optional Features:

8. In the 'Validity' textbox, set the 'Validity Period' for the certificate(by default,it is 90 days)
9. Public Key Length
10. Click on the 'Generate CSR' button to generate the CSR file.

Generating The Keystore File (and associating it to the CA signed certificates):

1. Unzip & extract all the certificates received from the CA to the <installation directory>\jre\bin
2. To generate keystore and add signed certificates,follow the below mentioned instructions:

Directions to generate keystore for 'Go Daddy' certificates:

```
keytool -import -alias root keystore selfservice.keystore -trustcacerts -file gd_bundle.crt
keytool -import -alias cross -keystore selfservice.keystore -trustcacerts -file gd_cross.crt
keytool -import -alias intermed -keystore selfservice.keystore -trustcacerts -file
gd_intermed.crt
keytool -import -alias tomcat -keystore selfservice.keystore -trustcacerts -file
selfservice.crt
```

Directions to generate keystore for 'Verisign' certificates:

```
keytool -import -alias intermediateCA -keystore selfservice.keystore -trustcacerts -file <
your intermediate certificate > .cer
keytool -import -alias tomcat -keystore selfservice.keystore -trustcacerts -file
selfservice.cer
```

Directions to generate keystore for 'Comodo' certificates:

```
keytool -import -trustcacerts -alias root -file AddTrustExternalCARoot.crt -keystore
selfservice.keystore
keytool -import -trustcacerts -alias addtrust -file UTNAddTrustServerCA.crt -keystore
selfservice.keystore
keytool -import -trustcacerts -alias ComodoUTNServer -file ComodoUTNServerCA.crt -
keystore selfservice.keystore
keytool -import -trustcacerts -alias essentialSSL -file essentialSSLCA.crt -keystore
selfservice.keystore
```

Embedding The SSL Certificate into ADSelfService Plus:

1. Ensure that Enable SSL Port is checked in the product.
   - Login in to "ADSelfService Plus"
   - Click on Admin -->>Product Settings -->>'Connection'
   - Provide check against 'Enable SSL Port' option
   - Click on Save (This will "Enable SSL Port")
2. Copy SelfService.keystore from <InstallDir>\jre\bin to <InstallDir>\conf
3. Edit "server.xml"(at <InstallDir>\conf) by replacing the value of:
   - "keystoreFile" with "./conf/SelfService.keystore"
   - "keystorePass" with whatever password you entered into the CSR generator. Save the server.xml
4. Restart ADSelfService Plus.

If the browser presents no warning,then you have installed the SSL certificate successfully.

- You are provided with the option of 'editing' an 'already configured connection' by clicking on the 'Edit' icon.
- Changes in the 'Port Number' will come into effect only at the 'Restart of the ADSelfService Plus application'
- Incase you want to refer to the 'Server' with the 'Machine Name' instead of using the 'Port Address',then it can be done so by declaring the 'Port Number' as '80'.

Server Settings

Here you can configure mail servers, SMS gateways and proxy settings required by ADSelfService Plus for sending notifications, OTP, etc.

- Configuring Mail Server Settings
- Configuring SMS Server Settings
- Configuring Proxy Settings

Mail Server Settings

Please follow the steps below to configure mail servers:

- Go to **Server Settings (Admin --> Product Settings --> Server Settings)**
- Specify the name or IP address of the **Mail Server** and its **Port number** in the respective boxes provided.
- In the **From Address** field enter the e-mail address from which you would like to receive the report mails.
- Click **Advanced Settings**.
- Enter the **Username** and **Password** of the Mail Server to avoid anonymous login.
- Choose the **Connection Security** (SSL/TLS) from the drop-down menu (for securing the data transmission between ADSelfService Plus & other applications)
- Check the **Send E-mails In HTML format** option. This option allows you to insert images, format the body of the message, etc. By default the mail will be sent in plain text format.
- Click **Save**

To verify your 'Mail Server Settings', send a test email via the "Send Test Mail" Link. A 'Test Mail' will be sent to the specified e-mail IDs.

SMS Server Settings

You can configure ADSelfService Plus to use your own GSM Modem for sending SMS. We also support 3rd party SMS providers like Clickatell (built-in support) or you can configure your own custom SMS Gateway.

- GSM Modem configuration
- Clickatell configuration
- Custom SMS Provider configuration

Configuring GSM Modem

- Go to **Server Settings (Admin --> Product Settings --> Server Settings)**
- Click **SMS Settings** tab.
- Select **GSMModem** from the SMS Provider drop down box.
- Specify the **Modem Port**.
- Click **Save**.

Steps Involved In Configuring The Modem Port & Modem Speed:

- Connect your GSM Modem to the Serial Communication Port.
- Only a serial cable must be used for connectivity.
- The port number for Window Devices will be comX. Eg. com7 or com8.
- Enter the Port Number to which the modem is connected :eg.(COM 1).

Requirements For Establishing SMS Server Connection:

- Modem/ Mobile must have GSM functionality with a provision to insert the SIM card.
- Should support 7bit (GSM default alphabet), 8bit and Unicode (UCS2) encoding.

- Matching these criteria allows ADSelfService Plus to support your modem/ mobile phone.

Configuring Clickatell

To use Clickatell as your SMS provider, you need to buy Clickatell SMS credits. Once you have enough SMS credits, you can start configuring Clickatell as you SMS provider.

- Go to **Server Settings (Admin --> Product Settings --> Server Settings)**
- Click **SMS Settings** tab.
- Select **Clickatell** from the SMS Provider drop down box.
- Click **Save**.

Configuring Custom SMS Provider

You can configure you own custom SMS gateway provided that the gateway is HTTP or SMTP based. Please follow the steps given below:

- HTTP-based SMS Provider
- SMTP-based SMS Provider

HTTP-based SMS provider:

- Go to **Server Settings (Admin --> Product Settings --> Server Settings)**
- Click **SMS Settings** tab.
- Select **Custom** from the **SMS Provider** drop down box.
- Select **HTTP** from the **Send SMS via** drop down box.
- Select whether you want to use **Post** or **Get HTTP method** for sending SMS.
- Enter the **HTTTP URL** of your SMS gateway provider.
- Enter the **HTTP Parameters** specific to your SMS provider.

  Note:

  - Separate the HTTP parameters by an ampersand (&) sign.
    Example format:
    userName=xxx&password=yyy&mobileNumber=%mobNo%&message=%message%.
  - You can use the following parameters:
  - **userName** = the parameter which is used to denote the API authentication username.
  - **xxx** = API authentication username.
  - **password** = the parameter which is used to denote the API authentication password.
  - **yyy** = API authentication password.
  - **mobileNumber** = recipient parameter.
  - **%mobNo%** = this macro denotes the user's mobile number.
  - **message** = message parameter.
  - **%message%** = this macro denotes the SMS message content.
  - **More HTTP Parameters** - If you SMS provider requires more parameters like unicode and apiID, include them as well using the '&' sign.

- Specify the **response** you get from your provider to determine whether the SMS has been sent successfully.
- Select the option **Convert Message into Unicode** to send SMS in Unicode format.
- Click **Save.**

SMTP-based SMS provider:

- Go to **Server Settings (Admin --> Product Settings --> Server Settings)**
- Click **SMS Settings** tab.
- Select **Custom** from the **SMS Provider** drop down box.
- Select **HTTP** from the **Send SMS via** drop down box.
- In the **From Address** field enter an email ID from which you want to send the SMS. Eg: noreply@adselfserviceplus.com
- In the **To Address** field enter the %mobNo% macro followed by the email of your provider. For example: %mobNo%@clickatell.com. Refer your SMS provider to know the exact values.
- Enter the details required in the **Subject** field. Generally, it would be either mobile number or message depending upon your SMS provider.
- Enter the details required in the **Content** field. This also depends on your SMS provider. Please refer them to know the exact values.
- Click **SMTP Server Settings**.
- Enter the **name or IP address** of the “SMTP Server” and its **Port number**.
- Enter the **username** and **password** of the SMTP server
- Click **Save**.

Note: If you don't configure the SMTP server settings, then the mail server configured under the Mail Settings tab will be used.

Proxy Settings

Please follow the steps below to configure proxy settings:

- Go to **Server Settings (Admin --> Product Settings --> Server Settings)**
- Click **Proxy Settings** tab.
- Select the option **Enable Proxy Settings**.
- Enter the **Server Name/IP address**, **Port Number** and the required **authentication details of the proxy server.**
- Click **Save** button.

Windows Service

Whenever an application is declared as a NT Service,then it can be accessed from any system,irrespective of it's location(the server in which it is installed).To declare the ADSelfService Plus as a NT Service follow the steps given below:

Steps To Be Followed Inorder To Install & Start ADSelfService Plus As A Service:

1. Please stop the ADSelfService Plus,if it is running(Start --> Programs -->ADSelfService Plus --> Stop ADSelfService Plus)
2. Install as a Service(Start --> All Programs --> ADSelfService Plus --> NT Service --> Install ADSelfService Plus as a Service)
3. Start as a service
   - Start -->Run and type 'services.msc'
   - Right-click on "ManageEngine ADSelfService Plus" and Click on Properties.
   - Go to Logon Tab and choose "This Account" option. Enter an Administrative credential and click OK.
   - Right click on Manage Engine ADSelfService Plus and Click on Start

Now it would be possible to access the ADSelfService Plus application,even if the system - in which ADSelfService Plus has been installed - is in a 'logged off' state.

License Management

As the name suggests, this feature enables you to manage licenses – that of ADSelfService Plus. Since ADSelfService Plus is a "per user" license product, this feature bears a huge significance.

When users enroll with ADSelfService Plus, they are provided with the access rights termed as the "license". In more simple terms, just as you need a license to drive a car, you need a license to use the services of ADSelfService Plus.

Why Do We Need License Management Feature?

What Exactly Is License Management?

Let's us assume an organization comprises of 5000 users and it purchases 5000 user licenses. Gradually, over the years, about 1000 employees drop out of the organization. Then, it means 1000 licenses, for which the organization made a payment, is being wasted! Now, what if the product offers the organization a chance to reuse these licenses,by giving it to new arrivals?! After all, an organization is a place where there will be steady influx and efflux of employees!

Well, this is "license management" in a nutshell - as simple as that! Manage user licenses, so as to provide the organization maximum benefit.

Advantages:

- Clients get their money's worth. No wastage of licenses = no wastage of money.
- Since old licenses are reused, there is no need to buy new licenses for new arrivals. More savings.
- Everything is organized.

In short,"license management" performs a sort of "drain the swamp" work for keeping an organization in an orderly manner.

Restricting inactive users from accessing ADSelfService Plus is a part of effective license management.

Click on Restrict Users for further details.

Restrict Users

In this page we discuss

- The users who can be restricted from using the License
- Configuring The License Management Feature
- Enabling a Restricted User

The users who can be restricted from using the License

License management involves the process of restricting users who fall under the following five categories:

1. Account Expired Users
2. Account Disabled Users
3. Inactive Users
4. Deleted Users &
5. Service Accounts.

1.Account Expired Users:

This happens for user accounts that are created for a shorter time duration (eg.in the case of a temporary employee). As the account's time duration elapses,the user account gets expired - as there is no point in maintaining a disembodied account. A user with an expired account will be stripped of his license.

2.Account Disabled Users:

The rights for disabling a user account is in the hands of the administrator. By disabling a user account,the administrator denies user the access to ADSelfService portal. This usually happens when a user retires from an organization.

3.Inactive Users:

License Management feature allows the administrator to block users who have been inactive for a specified time period.The time period can be set to any number of days (your choice). Using this feature you - the administrator - can take precautionary steps inorder to prevent any disarray in an organization.

All the Domain Controllers of the selected domain must be configured in ADSelfService Plus using Domain Settings in order to create a valid inactive users list.

4.Deleted Users:

Just as the license management feature restricts the inactive users, it can also forbid the deleted users from accessing the ADSelfService portal.As in most cases, there is no need of licenses for users who have been deleted from an organization.

5.Service Accounts:

A service account is a user account that is created explicitly to provide a security context for services running. Resetting the password for that account will stop the service from running. To avoid such cases service accounts are restricted to access ADSelfService portal.

When a user gets restricted,then the entire database related to that particular user is lost.The user will be restricted from following locations:

- From All Reports
- Login
- Auto Enrollment
- Enrollment Notification
- Organization Chart and Employee Search
- Self Update Manager List
- Technician List

Configuring the License Management Feature:

The license management feature can be configured to restrict users either manually or automatically.

Restrict Users Manually:

1. Navigate to **Admin --> License Management --> Restrict Users**
2. Select the required **Domain**
3. Select the desired **OUs** (if you want to restrict users from a particular OU)

4. Click **Manually**. A new window will open
5. From the **Account Type** drop-down menu select the type of users you want to restrict
6. Click **Generate**. A list of users of the selected type will be generated
7. Select the users you want to restrict. You can select all the users at once or a particular user.
8. Click **Restrict**

Once restricted, the user will not be able to log in or perform any actions using ADSelfService Plus. The enrollment data of the user will be deleted too.

Restrict Users Automatically:

1. Navigate to **Admin --> License Management --> Restrict Users**
2. Click **Automatically**. You will be taken to the Restrict Users Scheduler page
3. Click **Add New Scheduler**
4. Enter a **Name** and **Description** for the scheduler
5. Select the **domain** and the desired **OUs**
6. Now select the **type of users** that you want to restrict
7. **Specify the duration** for running the scheduler
8. You can also specify a email ID to which the restricted users list will be sent periodically
9. Click **Save**

Enabling A Restricted User:

Once restricted, the user will not be able to log in or perform any actions using ADSelfService Plus. The enrollment data of the user will be deleted too.

1. Navigate to Admin --> License Management --> Restrict Users. The restricted users list will be displayed
2. Select the users you want to reinstate
3. Click Allow Access
4. A message box will appear stating that the user was successfully reinstated

📝	When a user gets reinstated,the administrator has to re-enroll that particular user (since the information associated with the restricted users gets lost)

Troubleshooting Tips

Domain Settings

1. When I start ADSelfService Plus, none of my domains are discovered. It says "No Domain Configuration available". Why?
2. When I add my domains manually, the Domain Controllers are not resolved. Why?
3. When I add the Domain Controller, I get an error as "The Servers are not operational". What does it mean?
4. When I add the Domain Controller, I get an error as "Unable to get domain DNS / FLAT name". What does it mean?
5. The status column in the domain settings says that the user do not have Admin Privilege?

1. When I start ADSelfService Plus, none of my domains are discovered. It says "No Domain Configuration available". Why?

ADSelfService Plus, upon starting, discovers the domains from the DNS Server associated with the machine running the product. If no domain details are available in the DNS Server, it shows this message.

2. When I add my domains manually, the Domain Controllers are not resolved. Why?

When the DNS associated with the machine running ADSelfService Plus do not contain the necessary information. You need to add the Domain Controllers manually.

3. When I add the Domain Controller, I get an error as "The Servers are not operational". What does it mean?

This means that either the specified Domain Controller is invalid or it could no be contacted at present due to network unavailability.

4. When I add the Domain Controller, I get an error as "Unable to get domain DNS / FLAT name". What does it mean?

This error could be due to any of the following reasons:

1. When the specified user name or the password is invalid.
2. Anonymous login (when no user name and password is provided)
3. When IP Address of the Domain Controller is specified instead of its name.

5. The status column in the domain settings says that the user do not have Admin Privilege?

This is a warning message to indicate that the specified user do not have administrator privileges i.e, the user is not a member of Domain Admins Group. Hence permissions applicable to Administrator may not be available to this user.

Active Directory Self Update

1. Error Code - 80070005 / Error Code - 5 : Error In Setting Attributes, Access is denied
2. While user password reset, I get the following error "Error in setting the Password. The network path not found - Error Code: 80070035"
3. While user password reset, I get the following error "Error in setting the Password. There is a naming violation - Error Code : 80072037"
4. While updating the user information, I get the following error "The server is unwilling to process the request - Error Code : 80072035"
5. While updating the user information, I get the following error " Error In Setting Terminal service Properties. The specified user does not exist - Error Code : 525"
6. I have updated the exchange attributes using ADSelfService Plus, but the properties are not updated in the Exchange Server yet.
7. I am not able to set the Terminal Services properties for the user?
8. When I modify an user, I get the following error "A device attached to the system is not functioning - Error Code : 8007001f "
9. Email address for user not showing up or not set properly?
10. Error - The server is unwilling to process the request while resetting Password, which did not match password complexity
11. Error code: 8007052e
12. Error code: 80070775
13. Error code: 800708c5
14. No such user matched. Verify the LDAP attribute in search query

1. Error Code - 80070005 / Error Code - 5 : Error In Setting Attributes, Access is denied

Cause : User account do not have enough privilege over the object.

Solution :

1. Login to ADSelfService Plus with the "admin" credential.
2. Click on the "Domain Settings" found at the right top corner.
3. Click on the edit image to "Edit Domain Details".
4. Check the "Authentication" and provide the privileged "Domain User Name" and "Domain Password".
5. Save the Changes and continue with the operations.

2. While user password reset, I get the following error "Error in setting the Password. The network path not found - Error Code: 80070035"

While setting the password for the user if the target machine could not be contacted, this error is shown. This could happen when the DNS associated with the machine running ADSelfService Plus do not point to the Domain Controller where the user account is being created (possibly both are in different domains).

3. While user password reset, I get the following error "Error in setting the Password. There is a naming violation - Error Code : 80072037"

One possible reason for this error could be that the password contains some special characters that are not allowed.

4. While updating the user information, I get the following error "The server is unwilling to process the request - Error Code : 80072035"

One possible reasons for this error could be:

1. When modifying the SAM Account Name format for multiple users and when more than one user happen to have the same SAM Account Name.

5. While updating the user information, I get the following error " Error In Setting Terminal service Properties. The specified user does not exist - Error Code : 525"

One possible reason could be that the user or the system account as which the product is run do not have an account in the target domain. Terminal Service properties can only be set if the user account or the system account (applies when ADSelfService Plus is run as a service) that runs ADSelfService Plus has an account on the target domain.

6. I have updated the exchange attributes using ADSelfService Plus, but the properties are not updated in the Exchange Server yet.

ADSelfService Plus modifies the exchange properties in the Active Directory. The changes may not immediately reflect in the Exchange Server. It will get updated after some time.

7. I am not able to set the Terminal Services properties for the user?

One possible reason could be that the user or the system as which the product is run do not have an account in that domain.

Refer to here for starting ADSelfService Plus in User or System account.

8. When I modify an user, I get the following error " A device attached to the system is not functioning - Error Code : 8007001f "

The possible reasons for this error could be:

1. When modifying an user, if an unacceptable format is chosen for the naming attributes. For example, if the format chosen for the Logon Name is LastName.FirstName.Initials and if the user do not have any one of these attributes specified, this error will occur.

9. Email address for user not showing up or not set properly?

The possible reason could be:

1. Email may **Not be set** as per Recipient Policy. check whether all ldap attributes in recipient ploicy query are set to specific value.
2. Check in the user account properties whether you entered the attribute for email. Ex: xyz@**company.com.** The company should be entered to the users.

10. Error-The server is unwilling to process the request while resetting Password which not maches to password complexity

The possible reason could be:

You may not have specified or opt for any options in 'Password Complexity' while creating user account.

Ex: There will be options for password complexity like length of password, Characters that can be used or number of bad login attempts etc. You need to select any degree of complexity, ignoring so will throw above error.

11. Error code: 8007052e

The reason is, the Supplied credentials are invalid.

12. Error code: 80070775

Reason: The referenced account is currently locked out and may not be logged on.

13. Error code: 800708c5

Reason: The password does not meet the password policy requirements. Check the minimum password length, password complexity and password history requirements.

14.No such user matched. Verify the LDAP attribute in search query

Reason: No Users in AD matches with the criteria provided by you.Try choosing the correct matching attributes by checking with the query provided in the "Match criteria for Users in AD",this is obtained by clicking on "Update in AD" button and expanding "Select Attributes" box.

Active Directory Reports

1. When I specify the details and generate the report, it says "No Result available" or incomplete data
2. When I specify the details and generate the service accounts report, it says "No Permission to read"
3. AD Reports shows an object that do not exist in the Active Directory?

1. When I specify the details and generate the report, it says "No Result available" or incomplete data

It could be because of any of the following reasons:

1. When ADSelfService Plus could not contact the Domain Controller as it is not operational or due to network unavailability.
2. In case of multiple Domain Controllers, when the data is not replicated in all the Domain Controllers.
3. The LastLogonTime that is used to determine the inactive users and computers is not replicated in all the Domain Controllers. Hence, you need to specify all the Domain Controllers in the Domain Settings to enable ADSelfService Plus to retrieve the data from all the Domain Controllers.
4. When the password policy is not set (i.e., Max Password Age is set to zero), the Password Expired Users report and Soon to Password Expiry users report will not show any data.

2. When I specify the details and generate the service accounts report, it says "No Permission to read."

This occurs when there is no permission for the user given in domain settings to read the LSA policy object of the computer(s) selected..

3. AD Reports shows an object that do not exist in the Active Directory?

This mismatch could occur when the data is not synchronized with the Active Directory. The data synchronization with the Active Directory happens everyday at 1.00 hrs. If ADSelfService Plus is not running at that time, you can initiate the data synchronization manually by clicking the 🔄 icon of that domain from the Domain Settings.

Troubleshooting GINA

1. I receive the error message "Initiating Connection to Remote Service . . . Failed" why?
2. I receive the error message "Network path not found/Invalid Credential".
3. I receive the error message "The network path was not found".
4. Not able to copy ADSelfServicePlusClientSoftware.msi to the client machines. Why?
5. Couldn't connect to the machine, ADMIN$. Access is denied
6. Logon Failure: The target account name is incorrect.
7. Logon failure: unknown user name or bad password
8. I receive the message "Another installation is already in progress".
9. Couldn't start remote service. Overlapped I/O operation is in progress....

1. I receive the error message "Initiating Connection to Remote Service . . . Failed" why?

- Ensure if such a computer really exists. If so, ensure it is well connected to the network.
- To check for connectivity, ping this computer only from the server where ADSelfService Plus has been installed.

2. I receive the error message "Network path not found/Invalid Credential". Why?

- Ensure if such a computer really exists. if it exists, ensure it is well connected to the network.
- To check for connectivity, ping this computer only from the server where ADSelfService Plus has been installed.

3. I receive the error message "The network path was not found". Why?

- Ensure if such a computer really exists. If so, ensure it is well connected to the network.
- To check for connectivity, ping this computer only from the server where ADSelfService Plus has been installed.

4.Couldn't copy the MSI file "ADSelfServicePlusClientSoftware.msi" to the client machine. Why ?

Reason : Insufficient privilege to access the client machine.

Solution: Update the credential provided under the "Domain Settings" of ADSelfService Plus if Self Service Product is running as an application.

When ADSelfService Plus is running as service, update service account's credential from the "Logon" Tab editing the properties of "Services.msc"

5.Couldn't connect to the Client Machine, ADMIN$.Access is denied

Reason : Admin share might not be enabled.

Solution: Enable Admin share in the client computer and configure ADSelfService Plus domain settings using user credentials that has necessary permission to access the Admin share.

Step 1: Enable Admin Share

- From the client computer, select **Start --> Run** and **type gpedit.msc** and hit enter
- Expand the **Administrative Templates -> Network -> Network Connections -> Windows Firewall**
- Click **Domain Profile** and double click the **Windows Firewall : Allow inbound remote administration exception**
- Select **Enabled** and click **OK**

Step 2: Update the domain settins in ADSelfService Plus with user credential that has permission to access the Admin share

- When ADSelfService Plus is running in console mode, update the credential provided under the "Domain Settings" of ADSelfService Plus.
- When ADSelfService Plus is running as a service, update service account's credential from the "Logon" Tab editing the properties of "Services.msc".

6.Logon Failure: The target account name is incorrect.

1.This error message can occur if two computers have the same computer name. One computer is located in the child domain; the other computer is located in the parent domain.

7.Logon failure: unknown user name or bad password

Reason:.Admin share might not be enabled.

Solution:.Configure Domain Settings(When Run As Console) / Logon Tab(When Run As Service) with Administrative Credentials

8.Another installation is already in progress.

Solution : Try to install after few minutes

9.Couldn't start remote service. Overlapped I/O operation is in progress....

Solution : Try enabling "Remote registry" and "Server" service on the client machine.

Troubleshooting Mac

1. Connection timed out.
2. Connection refused.
3. Logon Failure: Unknown user name or bad password..
4. Permission denied

1. Connection timed out.

- Computer name to IP resolution is okay but the computer is not responding.
- Check if the computer is in ON state and can be pinged from the server where ADSelfService Plus has been installed.

2. Connection refused.

- Open up the mac client. Go to "System Preferences" -> "Sharing" and check if Remote Login is enabled.
- Check if the user credentials provided under the "Domain Settings" is allowed access for "Remote Login".

3. Logon Failure: Unknown user name or bad password
(or)
4. Permission denied.

- Check if the user credentials provided under the "Domain Settings" has Administrative privileges over the mac client.
- Open up the mac client. Go to "System Preferences" -> "Users & Groups" -> "Login Options" -> "Edit" -> "Open Directory Utility".
- Now double click on the "Service" by which the mac client has been joined to Active Directory. Check if the user is listed under "Allow Administration by" list.
- Also Go to Directory Editor in the Directory Utility and check if the Active Directory node can be connected using the user credentials provided under "Domain Settings".

Support

The one place you should turn to for all the guidance you need while working with the ADSelfService Plus application.

It provides you with the following features:

E- Mail Tech Support:

You can submit your queries regarding this application to the Tech Support team that will report back to you as soon as possible.

ADSelfService Plus application provides you with a Toll-Free number (**1-888-720-9500**) to which you can contact in case of requiring any guidance.

User Forums:

A place where the end-users can discuss various issues regarding this application.

You - the admin - too can gain an insight on how to better this application based on the views of the end-users posted under these forums.

Subscribing To ADSelfService Plus:

Subscribing to this application is a very easy task. To do so,the ADSelfService Plus provides you with the following details:

I The 'Get Quote' Option:

You can gain information about the 'price quotes' of this application by submitting the 'ADSelfService Plus Get Quote form' which requires you to fill in some personal details.

II The 'Pricing Details' Option:

You can also view the pricing details of ADSelfService Plus based on your requirements by clicking the 'Pricing Details' option.

III The 'Buy Now' Option:

Subscribe to ADSelfService Plus by clicking onto the 'Buy Now' option. It puts light onto the following features:

- 'Terms & Conditions' to be followed while making use of ADSelfService Plus.
- Two versions of ADSelfService Plus (Standard & Professional)
- Licensing Fee (in accordance with your requirements)

IV Compare Editions Option:

The ADSelfService Plus application is available in two different formats:

- Standard
- Professional

The 'Compare Editions' option provides a comparison between the two available versions,thereby providing you with a clear idea about the version that would suit you the best.