

HarePoint Active Directory Self Service Manual

For SharePoint Server 2019, SharePoint Server 2016, SharePoint Server 2013, SharePoint Foundation 2013, SharePoint Server 2010, SharePoint Foundation 2010, Microsoft Office SharePoint Server 2007 and Microsoft Windows SharePoint Services 3.0.



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I. Introduction

HarePoint Active Directory Self Service is a web part for SharePoint 2007/2010/2013/2016/2019 which allows users to manage and update their Active and SharePoint Directory profiles. With this product, you'll always have up-to-date directory information with practically no cost.

HarePoint Active Directory Self Service - Windows Internet Explorer											
C C C Klp:85/_layouts/HarePointSelfService/ChangeUserProperties.aspx											
Arrorites RavePoint Active Directory Self Service											
Site Actions 👻 🐋											
team HarePoint Active Directory Self Service My Settings Update your user information, regional settings, and alerts.											
Home S											
Libraries Site Pages	You are using trial version of	HarePoint Active Directory Self Serv		Sign Out Logout of this site.							
Shared Documents		lephones Organization	1	User Self Service Update your Active Direct user information.	ory						
Lists	First Name	Alexander									
Calendar	Initials	Ρ									
Tasks	Last Name	Gorlach									
Discussions	Display Name	Alexander Gorlach									
Team Discussion	Description										
	Office	310									
Recycle Bin	Telephone	+1 877 6274522 Other									
🖄 All Site Content	E-mail										
	Web Page				Other						
			Save	e Cance	el						

HarePoint Active Directory Self Service is a must-have instrument for domain administrators. With the help of this product, administrators can provide users with the possibility to add and modify the information in their Active Directory profile by oneself. Any user authorized on the web site can independently and quickly change his mobile phone number, address, etc.

With HarePoint Active Directory Self Service, site administrator can:

- Configure the set of profile fields shown to the user;
- Set the attributes of fields those available for editing or for reading only;
- Add own descriptions to the fields;
- Set a mask for fields in the form of regular expressions, which would eliminate the obviously incorrect data;

- Configure the web part access for certain users only / groups of users only;
- Identify users who would be able to edit not only their own Active Directory profile and SharePoint profile, but also the profiles of other users;
- Get logs with the data on all changes made;
- Receive reports on users' activity via email. These can be both detailed reports with a list of actions and customizable immediate notifications on changes.

II. Deployment

1. System requirements

HarePoint Active Directory Self Service is designed to operate in:

- Microsoft SharePoint Server 2019,
- Microsoft SharePoint Server 2016,
- Microsoft SharePoint Server 2013,
- SharePoint Foundation 2013,
- Microsoft SharePoint Server 2010,
- SharePoint Foundation 2010,
- Microsoft Office SharePoint Server 2007,
- Microsoft Windows SharePoint Services 3.0

(hereinafter referred to as SharePoint) environments.

The Product has no special requirements to operating system and its components, RAM memory space and CPU type. The Product may operate at any configurations where SharePoint is deployed; it requires 10 Mb of disk space on each SharePoint server.

2. Licensing and trial limitations

HarePoint Active Directory Self Service is licensed for a number of SharePoint Web Front-End Servers or servers where "Microsoft SharePoint Web Application" service is running. The number of licenses should correspond to a number of servers. The list of services installed on the server can be viewed by opening System Settings tab and clicking the link "Manage servers in this farm" on Central Administration site.

You may use the Product on the basis of one of two licenses:

- 1. **Trial License**. Provided automatically for a 30-day period to use the Product in organization's environment without any limitation of Product functionality.
- 2. **Commercial License**. This license is purchased for a number of SharePoint Servers and allows using the Product in the organization's environment without any limitation by usage time and functionality.

Note that after purchasing Commercial License and entering registration keys into the Product settings, the Product becomes fully functional.

See product page at <u>http://www.harepoint.com/</u> for more details about Product licensing and pricing.



3. Installing Active Directory Self-Service

To install the product you'll need Site Collection Administrator rights.

Please access any WFE server of the SharePoint farm, unpack the product archive into a folder on the local disk and Run SETUP.EXE. Installation Wizard will start:

HarePoint Active Directory Self Service								
HarePoint Active Directory Self Service								
Welcome to the HarePoint Active Directory Self Service setup wizard.								
This setup wizard will install and deploy the following solutions to your SharePoint 2010 farm: 1. HarePoint Active Directory Self Service for SharePoint 2010								
Back Next Ca	ancel							

Press Next button on the wizard's welcome screen and the wizard will check if the product can be installed:

HarePo	int Active Directory Self Service						
Pre	requisites						
	cking if HarePoint Active Directory Self Service can be installed from this hine.						
	You have permissions to install and deploy SharePoint solutions.						
🥑	Checking if Administrative Service is running.						
	Microsoft SharePoint Foundation Administration is running.						
	Checking if Timer Service is running.						
	Microsoft SharePoint Foundation Timer is running.						
	Checking if solutions exist in package.						
	Solutions are detected.						
	Checking if solution 'HarePoint Active Directory Self Service for SharePoint 2010' file exists.						
	Solution file C:\Users\Polivanniy\Desktop\temp\self\Resources\2010\HarePoint.SelfService.wsp						
	was found. Charleine if ank time "Uner Paint Antine Directory Call Consider for Charle Paint 2010" in share to						
	Checking if solution 'HarePoint Active Directory Self Service for SharePoint 2010' is already installed						
	Solution 'HarePoint Active Directory Self Service for SharePoint 2010' is installed (version						
	1.3.478.1232).						
	Checking for updates						
	No new version (current version: 1.3.478.1232).						
All checks succeeded. Please click Next to proceed with the installation.							
Back Next Cancel							
www.harepoint.com							

Should any problems be detected, please rectify them and restart the installation wizard.

At the next step of the Wizard, you'll choose site collections where the Product should be deployed. Select required site collections and follow the instructions of the Wizard to complete installation:

HarePoint Active Directory Self Service
Installation Progress
Completed
Installation completed successfully
Start activating features for solution HarePoint Active Directory Self Service for SharePoint 2010. Start activating site collection features. Site Collection feature HarePoint Active Directory Self Service Feature 'b8477b31-d0a9-4d9e-a7eb- 9227a18443c0' activated in http://oleg-pc. Site Collection feature HarePoint Active Directory Self Service Menu Icon Feature '023f5d52-e522- 445d-a85e-5619c852e203' activated in http://oleg-pc. Site Collection feature HarePoint Active Directory Self Service Feature 'b8477b31-d0a9-4d9e-a7eb- 9227a18443c0' activated in http://ultest. Site Collection feature HarePoint Active Directory Self Service Menu Icon Feature '023f5d52-e522- 445d-a85e-5619c852e203' activated in http://ultest. Site Collection feature HarePoint Active Directory Self Service Menu Icon Feature '023f5d52-e522- 445d-a85e-5619c852e203' activated in http://ultest. Site Collection feature HarePoint Active Directory Self Service Menu Icon Feature '023f5d52-e522- 445d-a85e-5619c852e203' activated in http://ultest. Finish activating site collection features. Finish activating features for solution HarePoint Active Directory Self Service for SharePoint 2010. Executing of the installation actions completed. Installation session completed at 25.04.2012 12:36:57.
www.harepoint.com

See the Section III of this manual for the post-install Product configuration guide.

4. How to repair, upgrade or remove the Product

To repair, upgrade or remove the product you'll need Site Collection Administrator rights.

Please enter to any WFE server of the SharePoint farm, unpack the product archive into a folder on the local dis and run SETUP.EXE. Installation Wizard will be launched. Following instructions of the Wizard, pass system check step similar to those during the product installation (see chapter 3). Upon completing these steps, the Wizard will ask you to repair, upgrade or remove Product components.

HarePoint Active Directory Self Service								
Upgrade								
Please select the operation you wish to perform								
HarePoint Active Directory Self Service is already installed. What would you like to do?								
Repair Retract the solutions and deploy them again.								
Remove Retract the solutions and delete them from the SharePoint solution store.								
Change Change deployment targets for the solutions.								
Please click Next to start the selected operation.								
www.harepoint.com Back Next Cancel								

Select the required type of operation and follow further instructions of the Wizard.

After the product is removed by Wizard, only Product's logs will be kept in the SharePoint ULS (Unified Logging Service) Log file folder. By default the logs are located here: C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\LOGS\

III. Product Overview

1. Getting started

This product consists of three parts:

- Administration page at Site Collection Administration; _
- Web-part that provide service for end-users; _
- Menu icon "User Self Service" at user's site menu.



This product is designed for managing by Site Collection administrators. This means that all settings have a scope of site collection. For example, if you have installed the Product on two site collections, you must enter the same product licensing keys into the settings at both site collections.



After the Product installation, users will be able to open the page with web-part at the address like:

http://site/ layouts/HarePointSelfService/ChangeUserProperties.aspx

using the link "User Self Service" in user's menu.

You should make post-installation configuration (see chapter 2 of this section) to make sure that the Product works as expected.

Also you can turn off the link in the user's menu and add web-part to some site page to offer the Product service for end-users (see chapter

3 of this section).

2. Post-installation configuration

Go to Site Collection Administration. Open the "HarePoint Active Directory Self Service" link in the Site Collection Administration section:



If you have license for the Product, please enter the license code into the "**Licenses**" section. This section also describes the type of your current license and in case of Trial License, the number of days left to its expiration:

Licenses	Trial mode: 30 days left.				
Specify license keys for each SharePoint server where HarePoint Active Directory Self Service is installed.	1 server was found where the product is installed.				

The most important setting is "Active Directory Connection Settings":

Specify account used to retrieve and save data into Active Directory. Typically, this account must be a member of the Domain Admins group. If no account is specified, the user will be prompted for password each time he wants to save changes.

Username	
Password	

Enter Login and Password of the user, who has privileges of editing user attributes. When these fields are filled, Active Directory attributes will be changed on behalf of the specified user.

This field can be left empty. In this case, each time the user edits his details a dialog requesting his Password to access the profile will appear:



Note that it is recommended to avoid entering passwords at web pages for security reasons.

The setting "Limit Access to Web Part" allows you to grant or deny access to the web-part for specified SharePoint users and/or groups:

Limit Access to Web Part Specify the users/groups that will not be able to view or change properties using HarePoint Active Directory Self Service web part.	 only specified users and groups will be able to use web part all users will be able to use web part, excluding specified users and groups
	Alexander Gorlach;

Radio buttons will switch the list of users and groups below to "white list" or to "black list".

Restricted users will see either web part, nor any warning or notification, except the product page with the address like <u>http://site/ layouts/HarePointSelfService/ChangeUserProperties.aspx</u> where the warning will appear.

To enable logging of user's activity, tick "Enable Active Directory Property Change Log". You can also specify when to start a new log file (old logs will be kept).

Enable Active Directory Property Change Log Write log file on the server when users change their properties.	Change Log Schedule Options Monthly Every 10 View Less
	View Logs

Log files are stored into the SharePoint ULS (Unified Logging Service) Log file folder. By default the logs are located here: C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\LOGS\

You can also press "View Logs" button to choose and download log files.

See other Product settings in the next chapter of this Manual.

3. Configuring web-part appearance

When you add web-part to the page, you can configure its appearance and layout in usual way by clicking "Edit Web Part" button:

		Editing	g Tools	Web Part Tools								Alexander Gorlach 🗸
Browse P	Page	Format Text	tInsert	Options					_			
Paste	ору	Verdana BII	 11px abe x₂ x² 	• •2, <u>A</u> , A ₂	╘╘┇	Styles	Text Layout +	Markup	n 🕺 🦓 🖗 🖗 🕺 NII	ect v	•	
Clipboard	ł		Font		Paragraph	Styles	Layout		-	rkup		
												HarePoint Active Directory Self Service $ imes$
HarePo	oint Ac	tive Direc	tory Self Se	ervice							\bigcirc	 Appearance
You an	re using	trial versio		t Active Direct	ory Self Service (30 days	left).			×			Title HarePoint Active Directory Self
Gene	eral	Address	Telephones	Organizatio	n			•	P	Edit Web Par Connections		Height
First Na	ame		Alexan	ler					-	Connections		Should the Web Part have a fixed height?
Initials	5		P									Yes Pixels No. Adjust height to fit zone.
Last Na	ame		Gorlach	1								Width
Display	y Name		Alexan	ler Gorlach								Should the Web Part have a fixed width?
Descrip	iption											No. Adjust width to fit zone.
Office												Chrome State
Teleph	none		+1 877	6274522				Othe	r			 Minimized Normal
E-mail			gorlach	@harepoint.com	n							Chrome Type
Web Pa	age							Othe	r			Default
												+ Layout
					Save		C	ancel				+ Advanced
												OK Cancel Apply

The Product also has two settings at Site Collection Administration, which affect the web-part appearance:

Self Service Link	Page title:
Activate or deactivate Self Service link feature in the current site	HarePoint Active Directory Self Service
collection dropdown menu.	Deactivate
Properties and Tabs Organize properties and tabs available on the Self Service web part.	Edit Layout Edit Properties Update Available Properties

"Self Service Link" turns on and off link "User Self Service" at the user's menu, which points to the page on the current site with the address like:

http://site/ layouts/HarePointSelfService/ChangeUserProperties.aspx



"Properties and Tabs" allows configuring web-part fields and tabs, and marking some fields as readonly.

Self Service Link Activate or deactivate Self Service link feature in the current site collection dropdown menu.	Page title: HarePoint Active Directory Self Service Deactivate
Properties and Tabs Organize properties and tabs available on the Self Service web part.	Edit Layout Edit Properties
	Update Available Properties

At "**Properties and Tabs**" section, click "**Edit Layout**" button, and a window with the web-part tabs will be opened. Click on the tab name in the list to edit fields set for this tab:

HarePoint Activ							
List Tools Items List		r					
🔲 Tab Name	Properties						
General	First Name; Initials; Last Name; Display Name; Description; Office; Telephone; E- mail; Web Page; Photo						
Address	Street; P. O. Box; City; State/Province; Zip/Postal Code; Country/Region						
Telephones	Home; Pager; Mobile; Fax; IP Phone; Notes						
Organization	1 Title; Department; Company; Manager	_					
Add new item Docs Docs2 HPADC Discussions	HarePoint Active Directory Self Service Tab List - Edit Edit Save Cancel Paste Copy Commit Clipboard Actions Tab Name * Organization	□ ×					
Team Discussion	Lookup Properties Add > Titl	e					
		partment mpany					
🔊 Recycle Bin		nager					
All Site Content	t Up						
	Down						
	Created at 4/27/2012 5:10 PM by Oleg Polivanniy Last modified at 4/27/2012 5:10 PM by Oleg Polivanniy						
	Specify the users groups that will have ability to chance properties of other users						

Here you can edit the list of fields displayed on the tab and the order of these fields.

At "**Properties and Tabs**" section, click "**Edit Properties**" button to open the list with the web-part fields list:

arePoint Active D List Tools tems List	irectory Self Se	rvice Properties List				>
Display Name	Source	Property Name	Syntax	Additional Property	Readonly	ſ
Country/Region	Active Directory	со	Choice	None	No	
Company	Active Directory	company	Text	None	No	
Department	Active Directory	department	Text	None	No	
Description	Active Directory	description	Text	None	No	
Display Name	Active Directory	displayName	Text	None	No	
Fax	Active Directory	facsimileTelephoneNumber	Text	otherFacsimileTelephoneNumber	No	
First Name	Active Directory	givenName	Text	None	No	
Home	Active Directory	homePhone	Text	otherHomePhone	No	
Notes	Active Directory	info	Text	None	No	
Initials	Active Directory	initials	Text	None	No	
IP Phone	Active Directory	ipPhone	Text	otherIpPhone	No	
Photo	Active Directory	thumbnailPhoto	Photo	None	No	
City	Active Directory	I	Text	None	No	

The list contains the following columns:

- Display Name Field name as it is displayed at web-part.
- Source This parameter is responsible for the source of obtained data of this field and the directory to which changes will be saved.
- Property Name The corresponding Active Directory attribute name.
- Syntax Specifies the data type accepted by the given field and the way of data input, for example, "Text" stands for free text input, "Photo" means the field contains a graphic file, and "Choice" means the user will be offered the choice of previously defined options. The borders of possible field values can be restricted in the field settings, for example, by using the following options:
 - Predefined Values In this setting you can specify predefined values for the profile field.
 Also here you can enable or disable the use of values not from a predefined list.
 - Regular Expression Using regular expressions, it is possible to specify a mask of output for the field, as well as a message that would be shown if an error occurs. The solution has already several patterns of regular expressions, for example, for checking E-Mail, phone and Url.

• Additional Property – Active Directory attribute name to save additional related values. If this property is specified, web-part displays the "Other..." button to enter additional values.

Telephone	+7 9062 388132	
E-mail	Other Telephone	
Web Page	New Value: Current Values:	Remove
		Edit
	OK	Cancel

• Read Only – This column allows marking field as read only.

HarePoint Self Se	ervice Property				
Display Name *	Country/Region				
Description					
Source	 Active Directory SharePoint 				
Property Name	co(Choice)				
Additional Property	None There is no additional multivalued property for selected property.				
Readonly					
Predefined Values	Use Predefined Values				
Regular Expression	Write regular expression: Write error message: Select regex for commonly used field types				
Number of Rows					
	Cancel				

Also the following properties are available in the field settings:

- Number of Rows Number of rows in the editing area of this field.
- Description Field description displayed in the web part.

Note, that if you wish to prohibit modifying of some field with the help of web-part, you can action in one of the following ways:

- Mark this field as read-only at Properties List window.
- Remove this field from the web-part at Tabs List window.
- Button "Update Available Properties" updates the list of available properties. In order not to refer to the directory service each time, available properties are saved to the service list during the installation of the HarePoint Self Service solution. When changes are made to the structure of Active Directory service or to the list of available properties, press this button to update the information.

4. Adding web-part to the page

Note that you need Design permission level to modify web pages. To add web-part to the page, click "Edit Page..." in "Site Actions" menu, go to "Insert" tab and click "Web Part" button. After that, open HarePoint category and choose "HarePoint Active Directory Self Service" and click Add button.

					Editing	Tools		Alexander Gorlach 🚽	
Site Action	ons 👻 🐋	i 📝	Browse	Page	Format Tex	Insert			
Table	Picture	Q Link	Upload File	Web E Part	xisting New List List				
Tables	Media	L	inks	W	eb Parts				
Catego	ories	v	Veb Part	s		Abo	ut the Web Part		
Bar Cor Fon Har Mec Soc		tent ation	HarePoin	nt Active Di	rectory Self Se	Hare	rePoint Active Directory Self Service Point Active Directory Self Service WebPart Web Part to: Rich Content •	Add Cance	1
selfser selfadr Home			у						E

After inserting web-part, click "Save & Close" button:

Site Actions 👻 🐋 🧊	Editing To Browse Page Format Text	ols Insert		Alexand	er Gorlach 🗸	
Save & Close Edit	Edit roperties Rename Page Manage	sions E-mail a	Make Incoming Lit mepage Actions	brary Library View All Page Library		
Recently Modified selfservice selfadm Home	HarePoint Active Director	y Self Service				
How To Use This Library Libraries	First Name Initials	Alexander P				
Site Pages Shared Documents	Last Name Display Name	Gorlach Alexander Gorlach				
Lists Calendar	Description					
Tasks	Office Telephone	+7 9062 388132			Other	
Team Discussion	E-mail Web Page	gorlach@mapilab.com				
Recycle Bin		www.harepoint.com	Save	e Cance	Other	

To configure web-part appearance see the previous chapter of this Manual.

Appendix A. Troubleshooting

To simplify the search and solve possible problems Windows Event Log error reporting has been added.

A.1 Product is not available at Site Collection Administration

Open "Site Collection Features" at Site Collection Administration and make sure the following features are activated:

- HarePoint Active Directory Self Service
- HarePoint Active Directory Self Service Menu Icon

A.2 Web-part asks for the user's password when it clicks on the "Save" button.

Check that "Active Directory Connection Settings" are not empty at the product settings in Site Collection Administration (see chapter 2 of Section III). Note that it is recommended to avoid entering passwords at web pages for security reasons.

A.3 Some users see a blank page without web-part.

Check "Limit Access to Web Part" setting at the product settings in Site Collection Administration (see chapter 2 of Section III).