



# **Virto Active Directory Service for SharePoint**

**Release 4.2.1**

**Installation and User Guide**

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# Virto Active Directory User Service 4.0.2 for SharePoint

## Overview

Virto SharePoint Active Directory User Service is a web part for SharePoint 2007, 2010 and 2013. It includes extended features for managing data of Active Directory database users.

Web-part includes two components – Self Service (for working with your own data) and User Service (for management of other users' data).

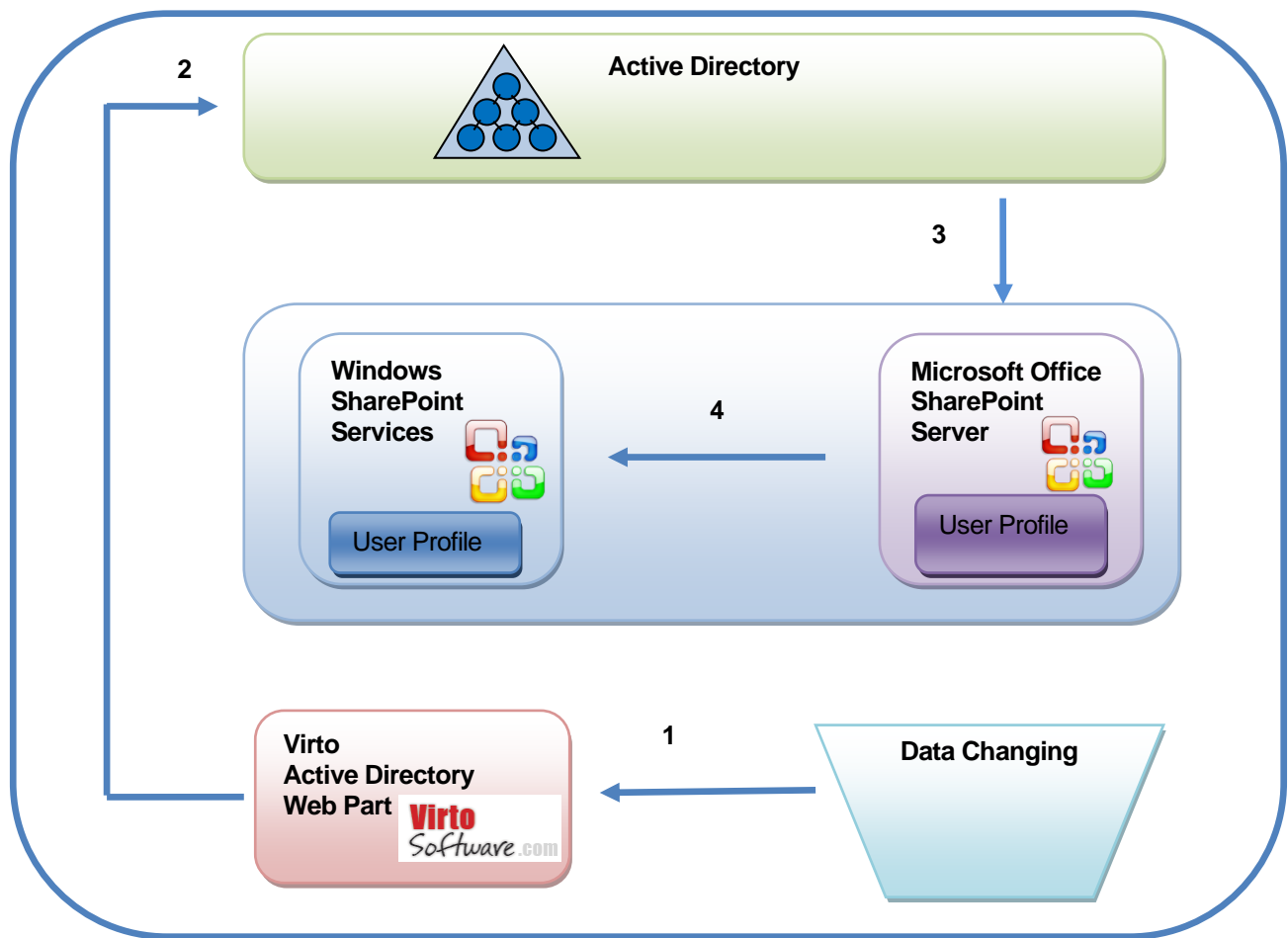
Self Service enables users to manage their AD account by themselves. Any authorized SharePoint user with the help of this web part can quickly change his mobile phone number; add date of birth, car number and any other data of his profile. This is very useful tool that enables to cut time of system administrators which they usually spend on users' data management.

With the help of User Service component you can manage not only your profile but other users' data (if it is allowed by the system security settings). When the web part is adjusted, it is pointed, which SharePoint group will be able to manage other users' profiles. It is also defined which exact data will be available for editing. For instance, you can allow human resources manager to change posts of other users, but personal data (first and last names) will be unavailable for editing.

All Active Directory users are displayed as a list sorted in alphabetical order. It is also possible to find any user with search tools. Web part enables to view user profiles in a special window where all the data are grouped by type (personal data, job details, contact information and etc).

It is required to remember security factor when managing other users' details. This factor is also taken into consideration by the web part developers. The web part can be adjusted by SharePoint administrator; he decides which users will have the rights of managing other users' data. It is also feasible to apply the settings which will forbid not only viewing some fields but will make it impossible to see them for some users.

## Virto Active Directory for SharePoint Data Flow



## System Requirements

### Operating System

Microsoft Windows Server 2003, 2008, 2012

### Server

SharePoint Release 2013:

- Microsoft Windows SharePoint Foundation 2013 or Microsoft Office SharePoint Server 2013;
- Microsoft .NET Framework 4.5;

*SharePoint Release 2010:*

- Microsoft Windows SharePoint Foundation 2010 or Microsoft Office SharePoint Server 2010;
- Microsoft .NET Framework 3.5;

*SharePoint Release 3:*

- Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007;
- Microsoft .NET Framework 3.5;

**Note:** This product is not compatible with SPS 2003 and WSS v2.

## Browser

Microsoft Internet Explorer 7 or higher is required.

## Installation

This section describes how to install, upgrade, uninstall, or contact Support for the Virto SharePoint Active Directory Web Part.

## Expected Outage

The expected outage time is from 2 minutes to several hours depending on your hardware and number of SharePoint sites. Though we recommend all Virto users to upgrade on a weekend.

## Installing Virto Active Directory Service for SharePoint

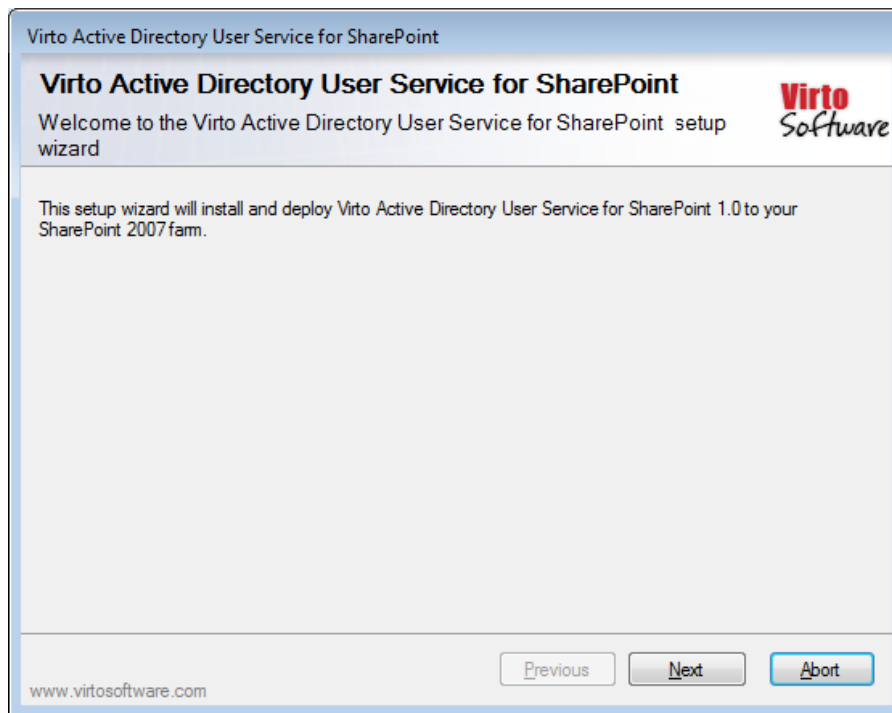
Before you begin, you need to make sure you have access to the server and your account must have the appropriate administrative privileges to install applications.

The Virto SharePoint Active Directory User Service Setup program provides links to the various installation components for the Active Directory User Service.

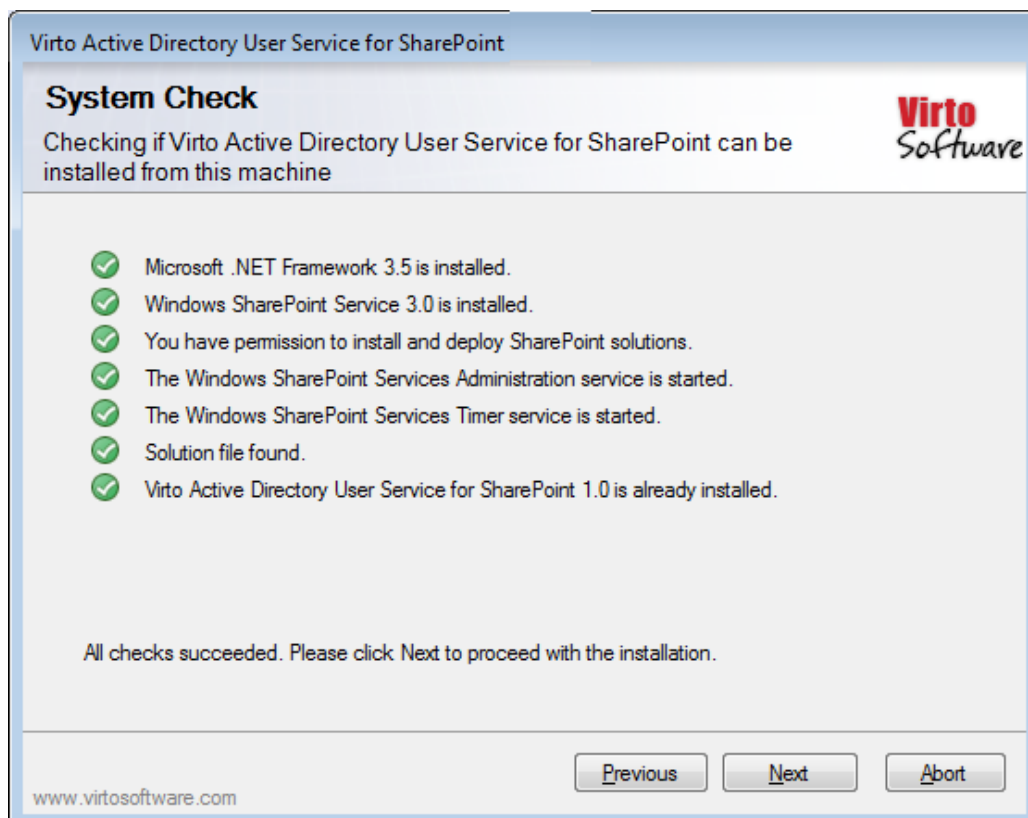
**Note:** Virto Active Directory User Service package contains two web parts: Virto SharePoint Active Directory User Service Web Part and Virto SharePoint Active Directory Self User Service Web Part. After installation **both** web parts will be available for adding to SharePoint site page.

To access the Virto Active Directory User Service Setup program download **Virto.SharePoint.2013.ADConfigFeature.zip** file and unzip it. Open unzipped folder and run extracted Setup.exe file.

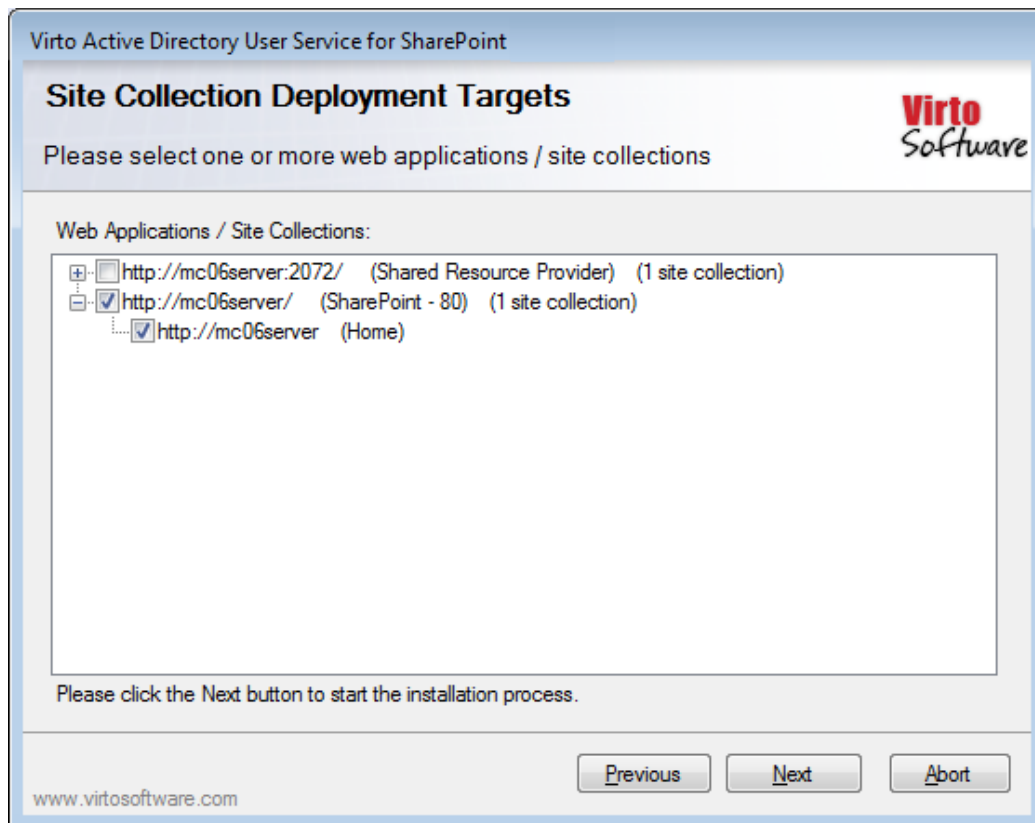
The setup wizard window will appear.



Virtto SharePoint Active Directory User Service setup wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click “Next”.

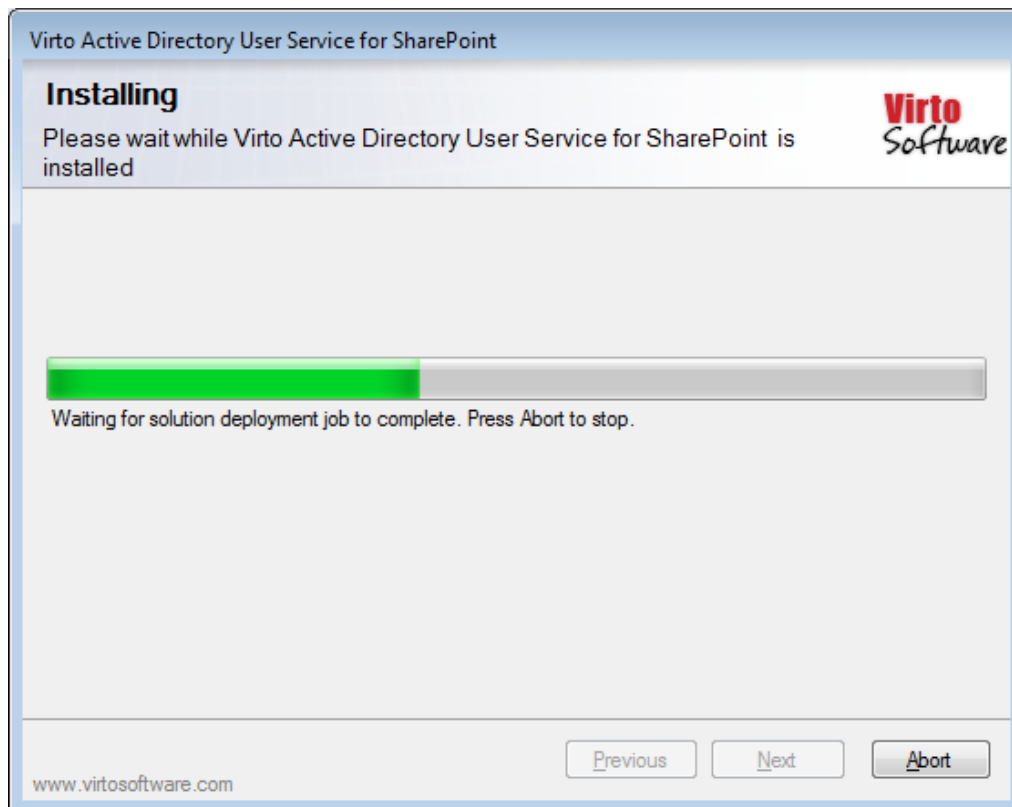


Check “I accept the terms in the License Agreement” and click “Next”.

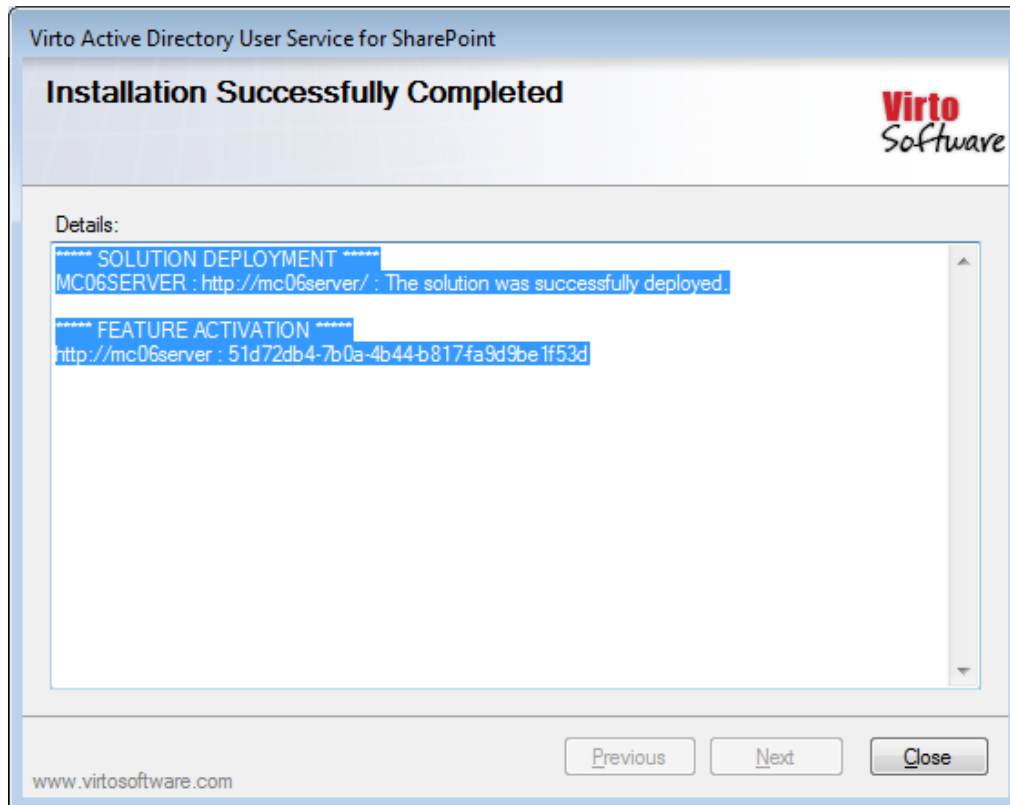


Select the web application(s) where you want to install the product.

**Warning:** You must be logged in to the SharePoint server with a Site Collection Administrator account to automatically activate this feature.



Then click "Next".



Click “Close” to complete the installation.

## Installing Virtto Active Directory User Service for SharePoint 2010

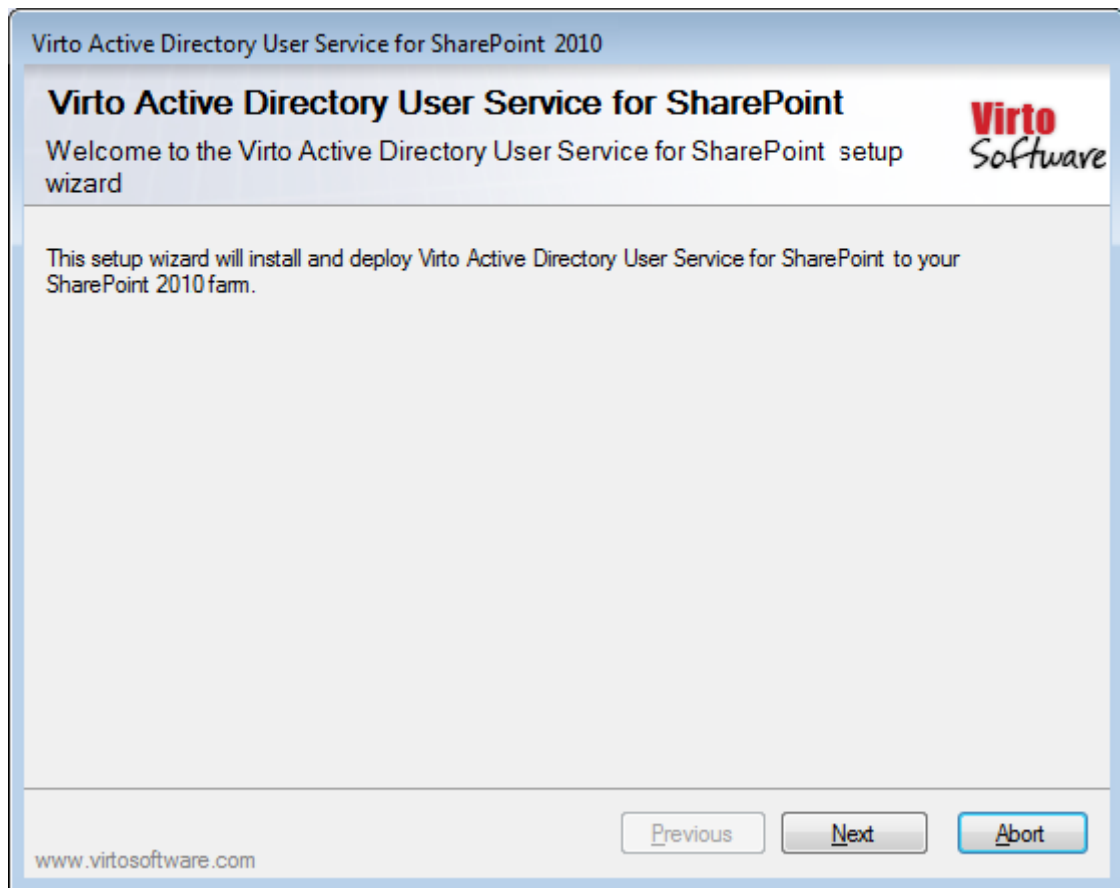
Before you begin, you need to make sure you have access to the server and your account must have the appropriate administrative privileges to install applications.

Virtto SharePoint Active Directory User Service for SharePoint 2010 setup program provides links to the various installation components.

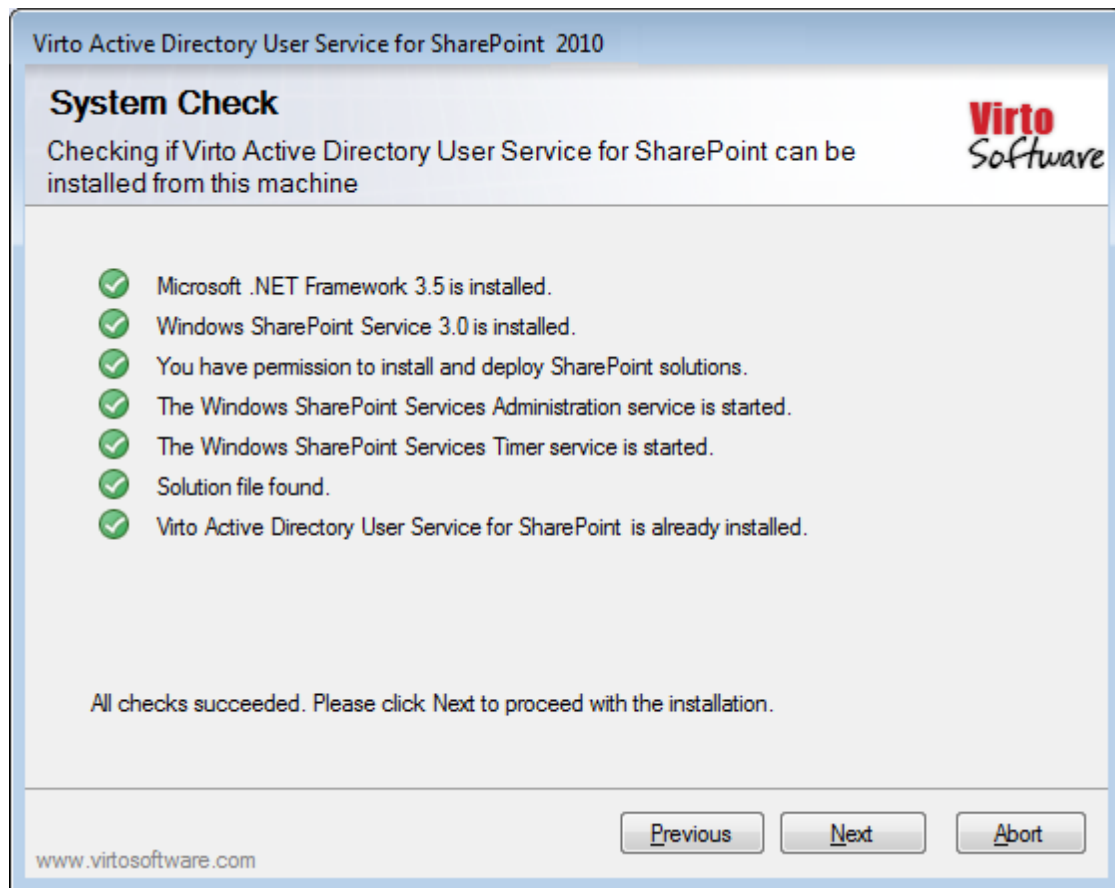
To access Virtto SharePoint Active Directory User Service for SharePoint 2010 Setup program download **Virto.SharePoint.2010.ADConfigFeature.zip** file and unzip it. Run extracted Setup.exe file.

The setup wizard window will appear.





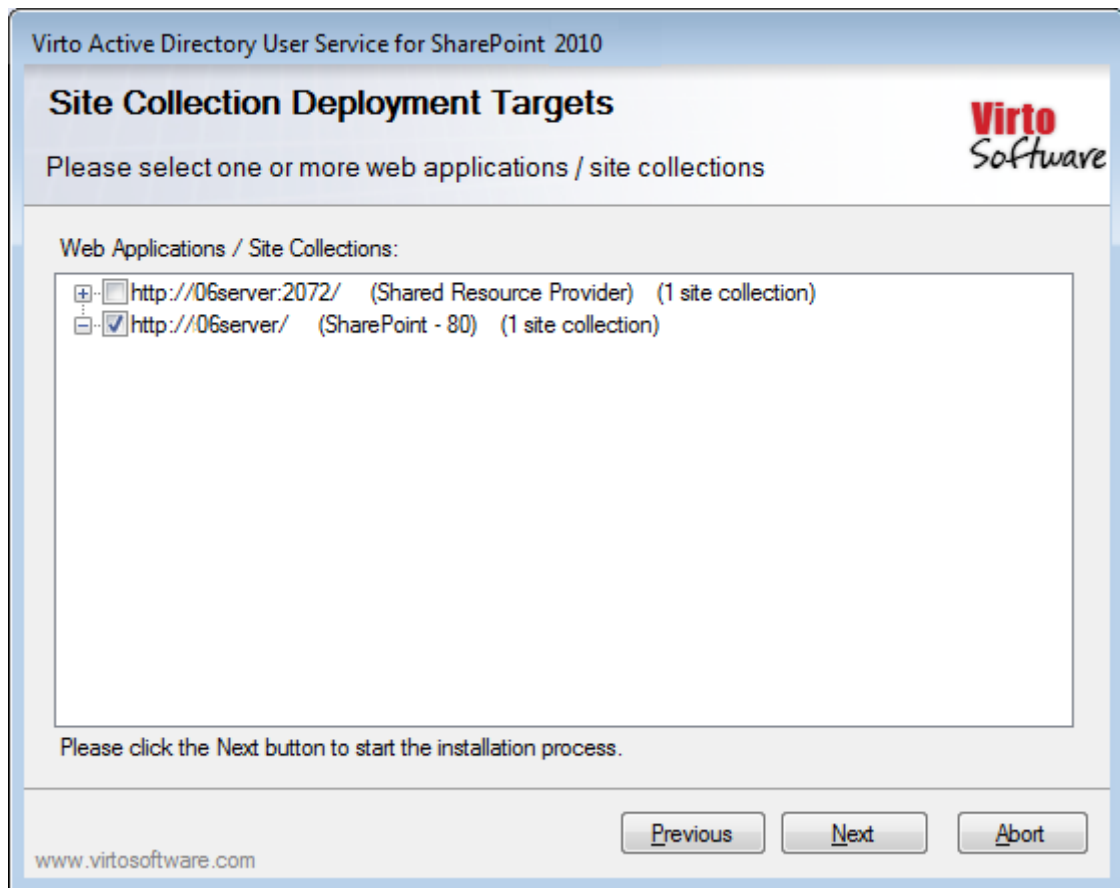
Virto SharePoint Active Directory User Service wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click "Next".



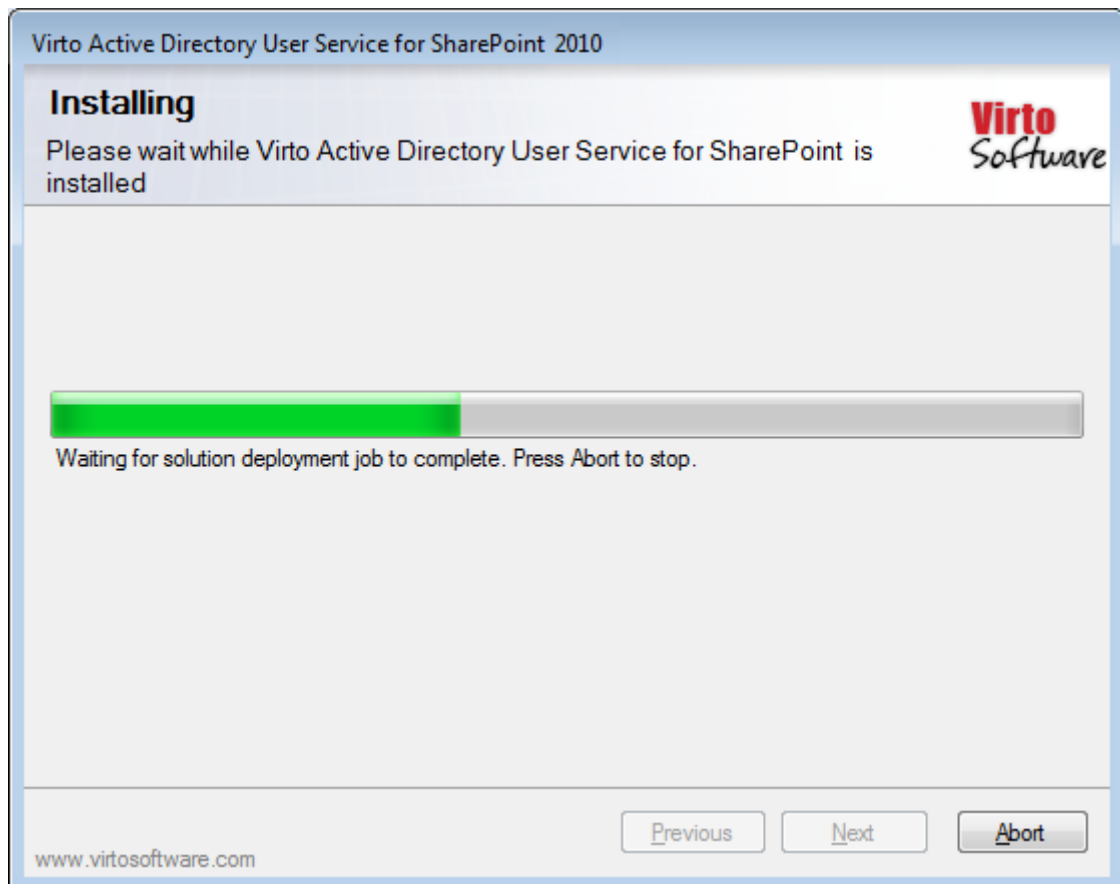
Check "I accept the terms in the License Agreement" and click "Next".

Select the web application(s) where you want to install the product.

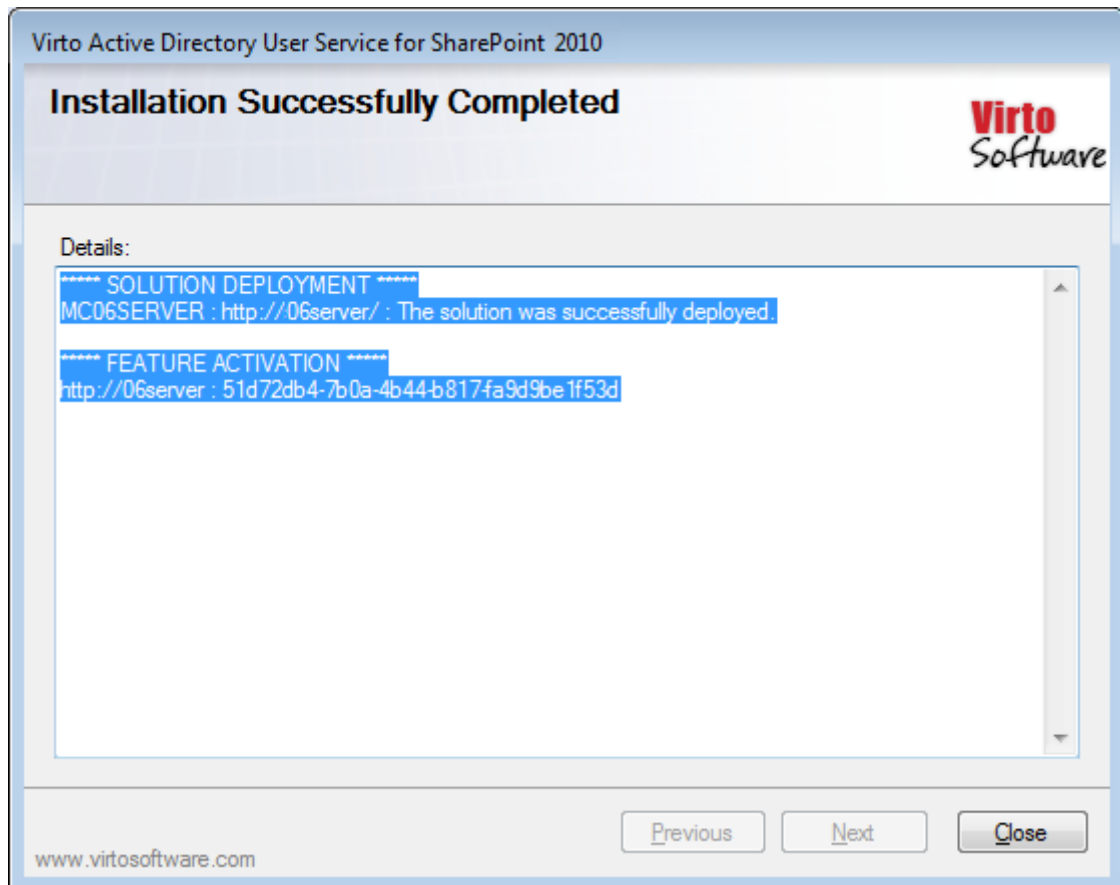
**Warning:** You must be logged in to the SharePoint server with a Site Collection Administrator account to automatically activate this feature.



Then click "Next".



Click “Close” to complete the installation.



## Installing Virtto SharePoint Active Directory User Service for SharePoint 2013

The installation is similar to the process described for SharePoint 2010.

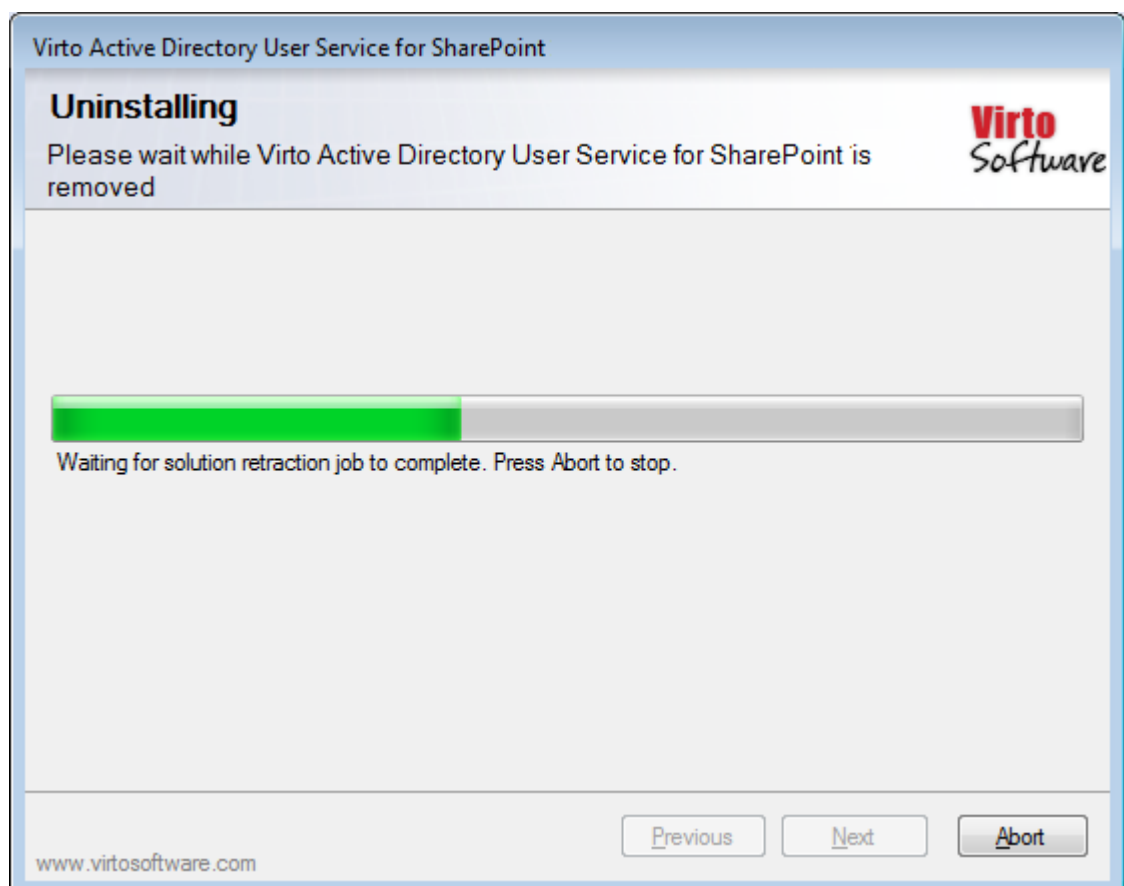
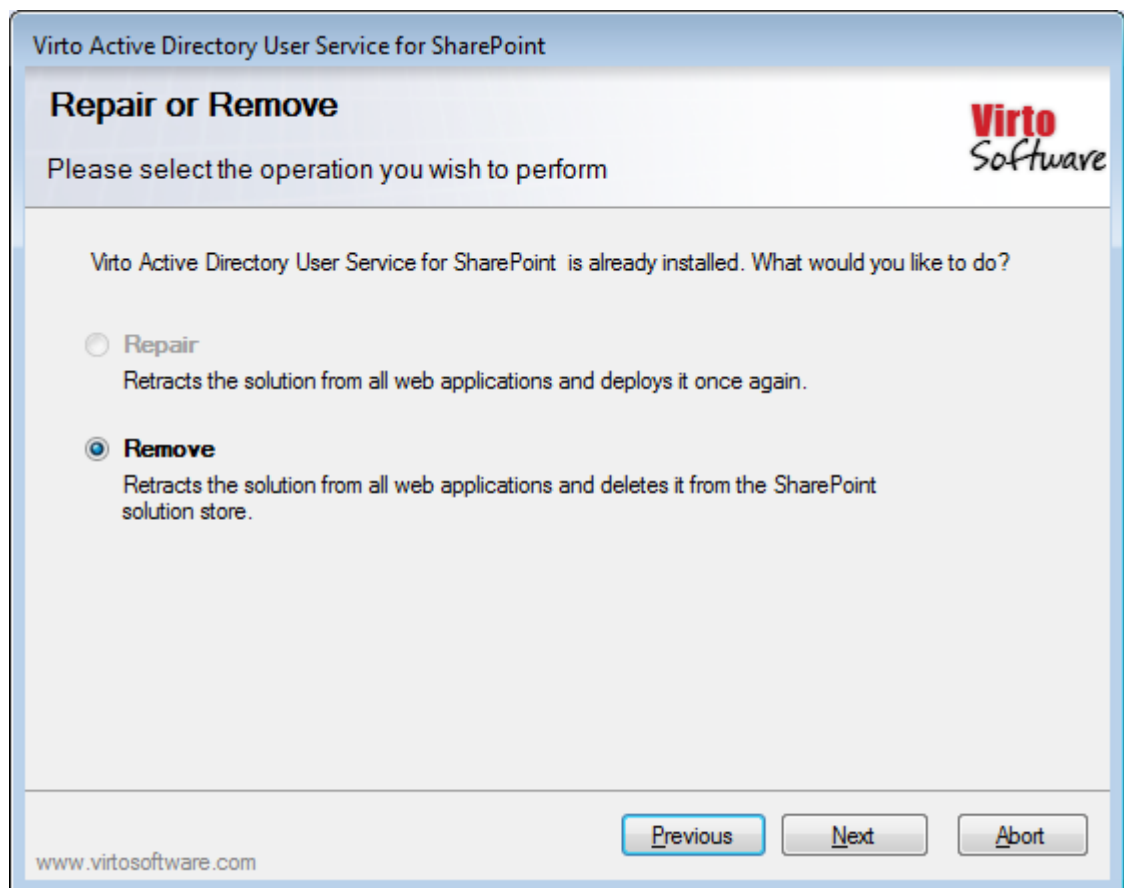
### License Activation

To see full instruction for successful activation of your component, please download “Virtto License Manager” PDF instruction from [Downloads](#) section of our site or read it in [Wiki](#).

## Uninstalling Virtto SharePoint Active Directory User Service Web Part

To uninstall the Web Part:

1. Double click the Setup.exe extracted from downloaded **Virtto.SharePoint.ADConfigFeature.zip** file.
2. The program performs the system checks again. Once that has successfully completed, the program prompts you to Repair or Remove the solution. Select Remove, and click “Next”.



## Upgrading Virto SharePoint Active Directory User Service

If you already use Virto SharePoint Active Directory User Service web part and need to upgrade it to the latest version, download the.zip file from <http://www.virtosoftware.com>. Unzip the file and run setup.exe as it is described in the *Installing Virto SharePoint Active Directory Service Web Part* section.

**Note:** it is highly recommended to exit License Manager before upgrading. If you need to use License Manager, run it after upgrading.

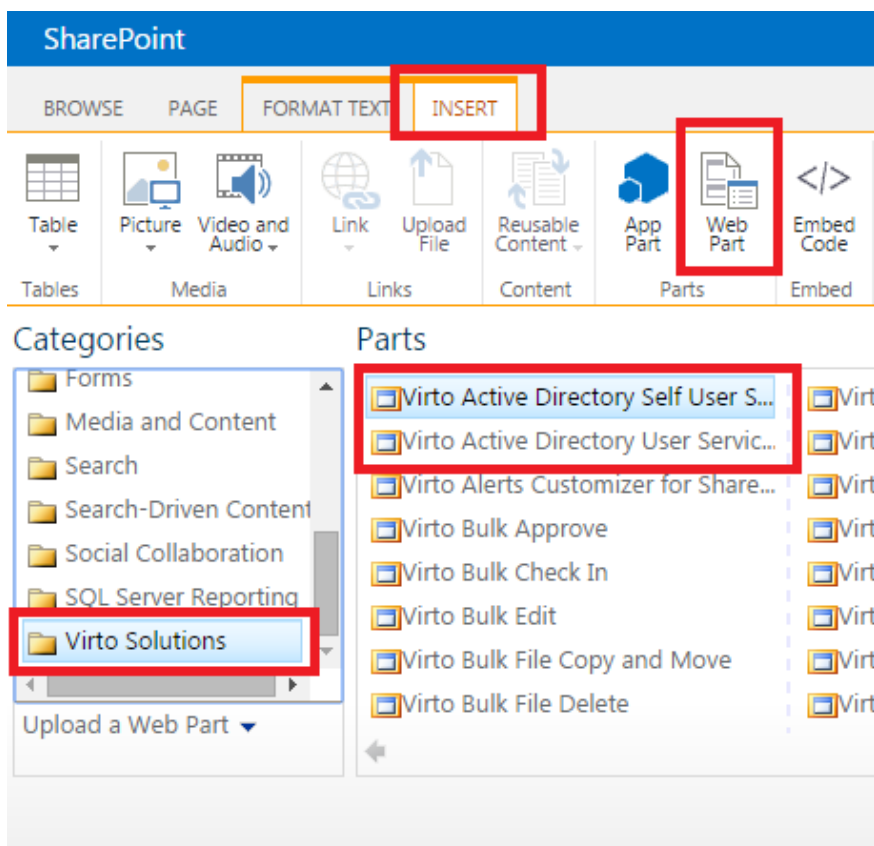
On the step 3 you will check the box “Upgrade” and click “Next”.

**Note:** if you had activated the license while installing the previous Virto SharePoint Active Directory Service version, you do not need to activate it now.

## Adding Web Part to a Page

Active Directory Service installation package contains two web parts - **Virto SharePoint Active Directory User Service** and **Virto SharePoint Active Directory Self User Service**. After installation you can add both of web parts or just one of them.

Click “Edit Page”. Then click “Add Web Part”. Select **Virto Active Directory User Service** or **Virto Active Directory Self User Service** or both and click “Add”.



## Active Directory Service Adjustment

To adjust Virto SharePoint AD User Service and Virto SharePoint AD Self User Service, you need to define **fieldsets** and then adjust each of web parts with “Edit Web Part” button. Fieldsets are the same for both web parts.

## Active Directory User Service Adjustment

### Fields Management

First of all administrator has to add all the required fields which will be used in fieldsets. Go to “Site Settings” and choose “Virto Active Directory Service Settings”

## Site Settings

### Users and Permissions

People and groups  
Site permissions  
Site app permissions

### Web Designer Galleries

Site columns  
Site content types  
Master pages and page layouts  
Composed looks

### Site Administration

Regional settings  
Language settings  
Site libraries and lists  
User alerts  
RSS  
Sites and workspaces  
Workflow settings  
Virto Unzip Settings  
Site Closure and Deletion  
Popularity Trends  
Term store management  
Site output cache  
Content and structure  
Content and structure logs  
Manage catalog connections  
Site variation settings  
Translation Status

**Virto Active Directory Service Settings**

### Look and Feel

Design Manager  
Master page  
Title, description, and logo  
Page layouts and site templates  
Welcome Page  
Device Channels  
Tree view  
Change the look  
Import Design Package  
Navigation  
Image Renditions

### Site Actions

Manage site features  
Reset to site definition  
Delete this site

### Reporting Services

Manage Shared Schedules  
Reporting Services Site Settings  
Manage Data Alerts

### Search

Result Sources  
Result Types  
Query Rules  
Schema  
Search Settings  
Searchable columns

**Note:** fields and fieldsets used for AD User Service and AD Self Service are the same. In case you are going to use both web parts, you do not need to manage fields and fieldsets one more time, just select required fieldset.

If you decided to use default connection (see **Virto SharePoint Active Directory User Service Web Part Settings** section), fill out domain name, account name and password fields and click “Save”. These data will be used for connection to AD information.

Virto Active Directory User Service for SharePoint 2013

Virto AD User Service Settings

**Active Directory connection settings**

☐ Use Default  
☒ Use Specific

Type in a fully qualified domain name. Example: mydomain.local

Fully qualified domain name:  
(example : mydomain.local)

virtosoft

Account name:

Admin

Password:

.....

**Use Fieldset:**

Default ▼

Then you can see used fieldset. All fieldsets have the one list of fields but different settings.

List of available fields with view, edit and search permissions

Select fieldset for working with AD information. Define which actions will be allowed for each field (viewing, editing, and searching).

Manage Fields Fieldset: Default ▼

Display Name	Allow View	Allow Edit	Allow Search
Account	✓	✓	✓
Email	✓	✓	✓
Post Office Box	✓	✓	✓
Title	✓	✓	✓
Company	✓	✓	✓

First of all it is required to manage fields in the fieldset. Click “Manage Fields”.

List of available fields with view, edit and search permissions

Select fieldset for working with AD information. Define which actions will be allowed for each field (viewing, editing, and searching).

Manage Fields Fieldset: Default ▼

Display Name	Allow View	Allow Edit	Allow Search
Account	✓	✓	✓
Email	✓	✓	✓
Post Office Box	✓	✓	✓



You will go to “Fields Management” page. Three blocks will be displayed: “Available Fieldsets” (see “**Fieldsets Adjustment**” section to learn more), “List of Available Field Formats” and “List of Fields”.

## Fields Management

### List of available fieldsets

Fieldsets are used for managing view, search and edit permissions for every AD field. You can create unlimited amount of fieldsets and use them for working with AD information. Each fieldset must have unique title. Default fieldset can be used as well.

Fieldset Title

[Click here to add new fieldset](#)

### List of available field formats

Field formats are used for validating input data. Here you can add new, delete or edit existing field format.

Name	Comment	Regular Expression	
E-mail	Please type a valid e-mail here.	<code>^[a-zA-Z0-9_%+~]+@[a-zA-Z0-9-~]+\.[a-zA-Z]{2,4}\$</code>	X
Positive integer	Please type a positive integer number here.	<code>^\d+\$</code>	X
Integer	Please type an integer number here.	<code>^[+-]?\d+\$</code>	X
Floating point number	Please type a floating poing number here.	<code>^[+-]?[0-9]*\.[0-9]+\$</code>	X
Web url	Please type a valid web url here.	<code>^((https? ftp):// (\? (\d{1,3})\.){3}(\d{1,3})\? (((\[-a-zA-Z0-9~\.\_+&amp;#%\$#=-\ \\ +)'?)*\$</code>	X

[Click here to add new field format](#)

### List of Fields

These fields are displayed in web part and available for editing according to the selected fieldset.

Displayed Name	AD Name	Tab Name	Sorting Order	Field Format	Allow Empty Values	Allow Multiple Values	Is Lookup Field	Max Value Length
Account	sAMAccountName	General	1		✓			×
Email	mail	Contact Information	1		✓			×
Post Office Box	postOfficeBox	Organization	1		✓			×

## Available Field Formats

Administrator can set parameters for fields' values. This will help to validate entered data when sending data to Active Directory. For example, the format of "E-Mail" field can be set. It is entered with regular expressions. You can find the list of regular expressions on <http://www.regular-expressions.info/>.

Create any amount of field formats. To make field format work, define required format for a field (see **“Adding and Editing Fields”**).

## Adding and Editing Fields

Click any field to edit its information. Or click “Add Field” to add a new one.

Postal Code	postalCode	Contact Information	5	✓	✕
Location	l	Contact Information	6	✓	✕
Address	streetAddress	Contact Information	7	✓	✕
<div> <div> Add Field </div> </div>					

The following parameters can be set for every field:

- 1) Displayed Name – name displayed in the list of fields.
- 2) AD Name – name in Active Directory corresponding to the current field.

- 3) Tab Name – Web Part’s tab which contains this field. Only one tab name can be selected.
- 4) Sorting Order – number of position in the list.
- 5) Allow Empty Values – ability to allow users to leave this field empty.
- 6) Allow Multiple Values – ability to allow users to enter more than one value for this field.

**Note:** “Allow Empty Values” and “Allow Multiple Values” check boxes work only in case Active Directory fields have the same settings.

- 7) Field type – type of field. The following types can be used.

- **String (or multiple strings);**

## New Field Adding

Displayed Name *	<input type="text"/>
AD Name *	<input type="text"/>
Tab Name:	General ▼
SortingOrder *	<input type="text"/>
Allow Empty Values	<input type="checkbox"/>
Field type *	String (or multiple strings) ▼
AllowMultipleValues	<input type="checkbox"/>
Max Value Length	<input type="text"/>
Field Format	None ▼

- **Integer** (enables to define minimum and maximum value);

Displayed Name *	<input type="text"/>
AD Name *	<input type="text"/>
Tab Name:	General ▼
SortingOrder *	<input type="text"/>
Allow Empty Values	<input type="checkbox"/>
Field type *	Integer ▼
Min value	<input type="text"/>
Max value	<input type="text"/>

- **Boolean** (enables to display checkboxes instead of txt box);

Displayed Name *	<input type="text"/>
AD Name *	<input type="text"/>
Tab Name:	General ▼
SortingOrder *	<input type="text"/>
Allow Empty Values	<input type="checkbox"/>
Field type *	Boolean ▼

- **Person** (just enter available logins (each login on new line);

<b>Displayed Name *</b>	Manager
<b>AD Name *</b>	manager
<b>Tab Name:</b>	General
<b>SortingOrder *</b>	
<b>Allow Empty Values</b>	<input type="checkbox"/>
<b>Field type *</b>	Person
Enter available logins (each login on new line) <div>           ga            Paul_virto            mb         </div>	
<div>OK</div> <div>Cancel</div>	

- **DateTime** (you can check the box “Date only” to display only the date, date picker can be used);

<b>Displayed Name *</b>	
<b>AD Name *</b>	
<b>Tab Name:</b>	General
<b>SortingOrder *</b>	
<b>Allow Empty Values</b>	<input type="checkbox"/>
<b>Field type *</b>	DateTime
<b>Date only</b>	<input type="checkbox"/>

- **Image** (only .jpg format is allowed).

General	About Me	Contact Information	Organization
<div>Save</div> <div>Cancel</div>			
<b>Account</b> nb			
<b>First Name</b> Nick			
<b>Last Name</b> Brook			
<b>Display Name</b> Nick Brook			
<b>Initials</b>			
<b>Photo</b> <div> <div>Choose File</div> <div>No file chosen</div> </div> <div> <input type="checkbox"/> Clear image         </div>			
<div>Save</div> <div>Cancel</div>			

8) Max Value Length – defined maximum length of entered text or symbols.

- 9) Field Format – one of available field formats (see “**Available Field Formats**” section).
- 10) “Lookup Field” – add any amount of values for this field which will be selected from the dropdown in the future (the list of cities for “Location” field for example”).

Max Value Length

Field Format: None

☒ Lookup Field

Lookup Values:

- Chicago
- London
- Sidney

Lookup Field

OK Cancel

Click “OK” to save the settings.

**Note:** there may be a situation, when user adds field that does not have any values in corresponding AD field (field is empty). In this case when user fills out this field with the web part, the same value will be written in the corresponding AD field as well.

When the list of fields is defined, you can adjust fieldsets.

## Fieldsets Adjustment

### Editing Fieldset

**Fieldsets** contain group of settings for fields. Fieldset defines which actions to do with fields will be allowed for users: viewing, editing, or searching.

Used fieldset is displayed on the “SharePoint Active Directory User Service Settings” page. One fieldset is used by default.

List of available fields with view, edit and search permissions

Select fieldset for working with AD information. Define which actions will be allowed for each field (viewing, editing, and searching).

Manage Fields

Fieldset: Default

Display Name	Allow View	Allow Edit	Allow Search
Account	✓	✓	✓
Email	✓	✓	✓
Post Office Box	✓	✓	✓

To change settings for field in the field set, just click the required field and make required modifications. Then click “Save”.

Display Name

**Account**

**Email**

**Post Office Box**

**Title**

**Company**

**Description**

Please click this link to edit field options

Display Name	Allow View	Allow Edit	Allow Search	
Account	✓	✓	✓	
Email	✓	✓	✓	
Post Office Box	✓	✓	✓	
Title	✓	✓	✓	
Company	✓	✓	✓	 
Description	✓	✓	✓	
First Name	✓	✓	✓	

## Creating Fieldset

You can create any amount of fieldsets and apply them for different sites of SharePoint groups.

In order to create new fieldset, click “Manage Fields” and use “Click here to add new fieldset” link.

## Fields Management

List of available fieldsets



Fieldsets are used for managing view, search and edit permissions for every AD field. You can create unlimited amount of fieldsets and use them for working with AD information. Each fieldset must have unique title. Default fieldset can be used as well.

Fieldset Title

[Click here to add new fieldset](#)



List of available field formats

Field formats are used for validating input data. Here you can add new, delete or edit existing field format.

Name	Comment	Regular Expression	
E-mail	Please type a valid e-mail here.	^[a-zA-Z0-9_%+~]+@[a-zA-Z0-9~]+\. [a-zA-Z]{2,4}\$	
Positive integer	Please type a positive integer number here.	^\d+\$	

Type name of new fieldset and click “Save”.

Fieldset Title


Fieldset for HR  

Now it will be possible to select this fieldset for using instead of default one (settings of web part, “Edit Web Part” button).

To adjust new fieldset, select it from the list and change settings for required fields as described above.

List of available fields with view, edit and search permissions

Select fieldset for working with AD information. Define which actions will be allowed for each field (viewing, editing, and searching).

 Manage Fields

Display Name	Allow View	Allow Edit	Allow Search	
Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Post Office Box	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

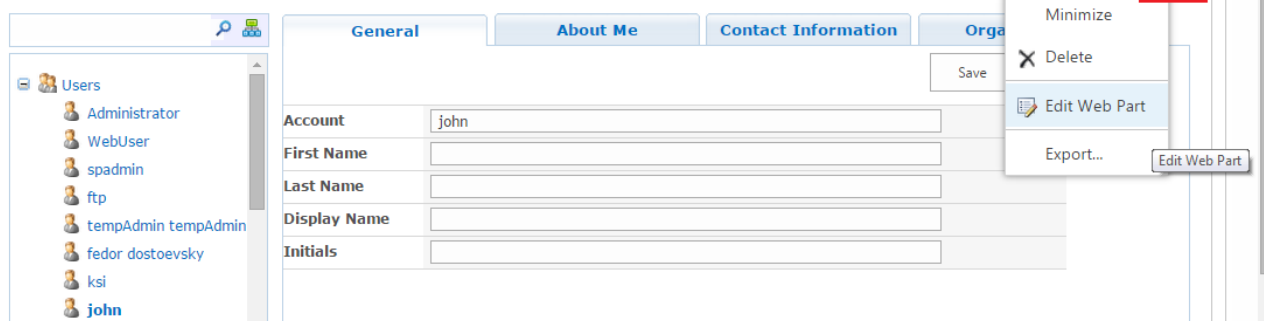
Fieldset: Fieldset for HR ▼

Now you can add User Service web part to different pages of SharePoint and create fieldsets for working with AD.

## Active Directory User Service Web Part Settings

Use “Edit Web Part” in the upper right hand corner of the page.

Virto Active Directory User Service for SharePoint 2013



Block of web part settings will be displayed.

◀ Virtto Active Directory User Service for SharePoint 2013 x

Virtto AD User Service Settings

**Active Directory connection settings**

☐ Use Default  
☒ Use Specific

Type in a fully qualified domain name. Example: mydomain.local

Fully qualified domain name:  
(example : mydomain.local)

virtosoft.local

Account name:  
Admin

Password:  
.....

---

**Use Fieldset:**

Default ▼

---

**Select the Site Group(s) permitted to update user profiles**

Only the site administrator is allowed to modify these permissions

☒ Approvers  
☒ Designers

## Type of Connection

First of all select the type of connection to AD:

- 1) *“Use default”* – default data will be required for connection to AD, defined by administrator; default data is defined on the Active Directory User Service Settings (see the next section).
- 2) *“Use specific”* – specific details will be required for connection to AD, can be defined by users who has access to AD. In this case it is required to enter domain name, account name, and password.

◀ Virtto Active Directory User Service for SharePoint 2013 x

Virtto AD User Service Settings

**Active Directory connection settings**

☐ Use Default  
☒ Use Specific

## Who Updates Profiles

Now define which SharePoint groups will be able to update user profiles.

### Select the Site Group(s) permitted to update user profiles

Only the site administrator is allowed to modify these permissions

- ☒ Approvers
- ☒ Designers
- ☐ Excel Services Viewers
- ☒ Hierarchy Managers
- ☐ Quick Deploy Users
- ☐ Restricted Readers
- ☐ Style Resource Readers
- ☒ Team VirtoSoftware Members
- ☐ Team VirtoSoftware Owners
- ☐ Team VirtoSoftware Visitors
- ☐ Translation Managers

## Which Profiles Can Be Updated

In case you want to define group of users which profiles will be possible to edit, you can type path to his group in the special settings block. When you click “Apply” or “OK” the web part will display only users within this group.

### Enter the Organization Unit Path

Type in the directory path to the Organizational Unit containing the users you want to display in the Web Part

MyCompany\Sales

Example: MyCompany\Production. Users within the Production organizational unit from MyCompany organizational unit are displayed in the Web Part. (Leave this text box blank to show users from all Organizational Units.)



## Interactive Search Parameters

You can define maximum of users displayed while searching. Just type required number. Click “OK” or “Apply” to save the settings.

### Interactive search settings

Enter number of displaying search results. To show all results leave this field blank.

## Other Settings

Define maximum height of users list to display in web part.

### Web part size settings

Maximum height of users list in pixels (default value is 400)

### Users visibility settings

☐ Show inactive users

You hide inactive users in the list. Uncheck the box “Show inactive users” in this case.

Now the basic settings of web part are defined. Click “OK” to finish or us “Apply” to save the settings and continue adjustment.

## Active Directory Self Service Adjustment

### Fields Management

First of all administrator has to add all the required fields which will be used in fieldsets. Go to “Settings – Site Settings”.

**Note:** if you already adjusted fields and fieldsets as described in **Active Directory User Service Adjustment** section, you **don’t** need to manage fields and fieldsets one more time. These settings are the same for both web parts. Just move to **SharePoint Active Directory Self Service Web Part Settings**.

Then find the link “Virto SharePoint Active Directory Service Settings” and follow it.

# Site Settings

## Users and Permissions

People and groups  
Site permissions  
Site app permissions

## Web Designer Galleries

Site columns  
Site content types  
Master pages and page layouts  
Composed looks

## Site Administration

Regional settings  
Language settings  
Site libraries and lists  
User alerts  
RSS  
Sites and workspaces  
Workflow settings  
Virtio Unzip Settings  
Site Closure and Deletion  
Popularity Trends  
Term store management  
Site output cache  
Content and structure  
Content and structure logs  
Manage catalog connections  
Site variation settings  
Translation Status

**Virtio Active Directory Service Settings**

## Look and Feel

Design Manager  
Master page  
Title, description, and logo  
Page layouts and site templates  
Welcome Page  
Device Channels  
Tree view  
Change the look  
Import Design Package  
Navigation  
Image Renditions

## Site Actions

Manage site features  
Reset to site definition  
Delete this site

## Reporting Services

Manage Shared Schedules  
Reporting Services Site Settings  
Manage Data Alerts

## Search

Result Sources  
Result Types  
Query Rules  
Schema  
Search Settings  
Searchable columns

You will go to “Active Directory User Service Settings” page.

## Active Directory User Service Settings

### Active Directory default connection settings

AD account data used for logging in by default. Users who know these details can perform different actions allowed by the web part.

Fully qualified domain name:  
(example : mydomain.local)

Account name:

Password:

Save

Clear

### List of available fields with view, edit and search permissions

Select fieldset for working with AD information. Define which actions will be allowed for each field (viewing, editing, and searching).

### Manage Fields

Fieldset:

Display Name	Allow View	Allow Edit	Allow Search
Account	✓	✓	✓
Email	✓	✓	✓
Post Office Box	✓	✓	✓
Title	✓	✓	✓
Company	✓	✓	✓

If you decided to use default connection (see **Virto SharePoint Active Directory self Service Web Part Settings** section), fill out domain name, account name and password fields and click “Save”. These data will be used for connection to AD information.

## Active Directory User Service Settings

### Active Directory default connection settings

AD account data used for logging in by default. Users who know these details can perform different actions allowed by the web part.

Fully qualified domain name:  
(example : mydomain.local)

Account name:


Password:




Then you can see used fieldset. All fieldsets have the one list of fields but different settings.

List of available fields with view, edit and search permissions

Select fieldset for working with AD information. Define which actions will be allowed for each field (viewing, editing, and searching).

 **Manage Fields**


Fieldset:

Display Name	Allow View	Allow Edit	Allow Search
<b>Account</b>	✓	✓	✓
<b>Email</b>	✓	✓	✓
<b>Post Office Box</b>	✓	✓	✓
<b>Title</b>	✓	✓	✓

First of all it is required to manage fields in the fieldset. Click “Manage Fields”.

List of available fields with view, edit and search permissions

Select fieldset for working with AD information. Define which actions will be allowed for each field (viewing, editing, and searching).

 **Manage Fields**

Fieldset:

Display Name	Allow View	Allow Edit	Allow Search
<b>Account</b>	✓	✓	✓
<b>Email</b>	✓	✓	✓
<b>Post Office Box</b>	✓	✓	✓

You will go to “Fields Management” page. Three blocks will be displayed: “Available Fieldsets” (see “**Fieldsets Adjustment**” section to learn more), “List of Available Field Formats” and “List of Fields”.

## Fields Management

### List of available fieldsets

Fieldsets are used for managing view, search and edit permissions for every AD field. You can create unlimited amount of fieldsets and use them for working with AD information. Each fieldset must have unique title. Default fieldset can be used as well.

Fieldset Title

[Click here to add new fieldset](#)

### List of available field formats

Field formats are used for validating input data. Here you can add new, delete or edit existing field format.

Name	Comment	Regular Expression	
E-mail	Please type a valid e-mail here.	^[a-zA-Z0-9_%.+~]*@[a-zA-Z0-9-]+\.[a-zA-Z]{2,4}\$	X
Positive integer	Please type a positive integer number here.	^\d+\$	X
Integer	Please type an integer number here.	^[+-]?\d+\$	X
Floating point number	Please type a floating poing number here.	^[+-]?[0-9]*\.[0-9]+\$	X
Web url	Please type a valid web url here.	^((https? ftp)://(\{([0-9]{3})\}d{1,3}\.?)? ([a-zA-Z0-9-]+\.[a-zA-Z]{2,4}))(\{([0-9]{3})\}d{1,3}\.?)? ([a-zA-Z0-9-]+\.[a-zA-Z]{2,4}))(\{([0-9]{3})\}d{1,3}\.?)? ([a-zA-Z0-9-]+\.[a-zA-Z]{2,4}))\$	X

[Click here to add new field format](#)

### List of Fields

These fields are displayed in web part and available for editing according to the selected fieldset.

Displayed Name	AD Name	Tab Name	Sorting Order	Field Format	Allow Empty Values	Allow Multiple Values	Is Lookup Field	Max Value Length	
Account	sAMAccountName	General	1		✓				X
Email	mail	Contact Information	1		✓				X
Post Office Box	postOfficeBox	Organization	1		✓				X

## Available Field Formats

Administrator can set parameters for fields' values. This will help to validate entered data when sending data to Active Directory. For example, the format of "E-Mail" field can be set. It is entered with regular expressions. You can find the list of regular expressions on <http://www.regular-expressions.info/>.

Create any amount of field formats. To make field format work, define required format for a field (see **"Adding and Editing Fields"**).

## Adding and Editing Fields

Click any field to edit its information. Or click "Add Field" to add a new one.

Postal Code	postalCode	Contact Information	5	✓	X
Location	l	Contact Information	6	✓	X
Address	streetAddress	Contact Information	7	✓	X
<a href="#">Add Field</a>					

The following parameters can be set for every field:

- 1) Displayed Name – name displayed in the list of fields.
- 2) AD Name – name in Active Directory corresponding to the current field.
- 3) Tab Name – Web Part's tab which contains this field. Only one tab name can be selected.
- 4) Sorting Order – number of position in the list.
- 5) Allow Empty Values – ability to allow users to leave this field empty.
- 6) Allow Multiple Values – ability to allow users to enter more than one value for this field.

**Note:** “Allow Empty Values” and “Allow Multiple Values” check boxes work only in case Active Directory fields have the same settings.

7) Field type – type of field. The following types can be used.

- **String (or multiple strings);**

## New Field Adding

Displayed Name *	<input type="text"/>
AD Name *	<input type="text"/>
Tab Name:	General ▼
SortingOrder *	<input type="text"/>
Allow Empty Values	<input type="checkbox"/>
Field type *	String (or multiple strings) ▼
AllowMultipleValues	<input type="checkbox"/>
Max Value Length	<input type="text"/>
Field Format	None ▼

- **Integer** (enables to define minimum and maximum value);

Displayed Name *	<input type="text"/>
AD Name *	<input type="text"/>
Tab Name:	General ▼
SortingOrder *	<input type="text"/>
Allow Empty Values	<input type="checkbox"/>
Field type *	Integer ▼
Min value	<input type="text"/>
Max value	<input type="text"/>

OK Cancel

- **Boolean** (enables to display checkboxes instead of txt box);

Displayed Name *	<input type="text"/>
AD Name *	<input type="text"/>
Tab Name:	General ▼
SortingOrder *	<input type="text"/>
Allow Empty Values	<input type="checkbox"/>
Field type *	Boolean ▼

- **Person** (just enter available logins (each login on new line);

Displayed Name *	Manager
AD Name *	manager
Tab Name:	General ▼
SortingOrder *	
Allow Empty Values	<input type="checkbox"/>
Field type *	Person ▼
Enter available logins (each login on new line) <div>           ga            Paul_virto            mb         </div>	
<div>OK</div> <div>Cancel</div>	

- **DateTime** (you can check the box “Date only” to display only the date, date picker can be used);

Displayed Name *	
AD Name *	
Tab Name:	General ▼
SortingOrder *	
Allow Empty Values	<input type="checkbox"/>
Field type *	DateTime ▼
Date only	<input type="checkbox"/>

- **Image** (only .jpg format is allowed).

- 8) Max Value Length – defined maximum length of entered text or symbols.
- 9) Field Format – one of available field formats (see “**Available Field Formats**” section).
- 10) “Lookup Field” – add any amount of values for this field which will be selected from the dropdown in the future (the list of cities for “Location” field for example”.

**Max Value Length**


**Field Format** None ▼

**Lookup Field**

☒ Lookup Field

Lookup Values:

- Chicago
- London
- Sidney



OK Cancel

Now you can see this field in the web part ("Location" field).

Click "OK" to save the settings.

**Note:** there may be a situation, when user adds field that does not have any values in corresponding AD field (field is empty). In this case when user fills out this field with the web part, the same value will be written in the corresponding AD field as well.

When the list of fields is defined, you can adjust fieldsets.

## Fieldsets Adjustment

### Editing Fieldset

**Fieldsets** contain group of settings for fields. Fieldset defines which actions to do with fields will be allowed for users: viewing, editing, or searching.

Used fieldset is displayed on the "Active Directory User Service Settings" page. One fieldset is used by default.

List of available fields with view, edit and search permissions

Select fieldset for working with AD information. Define which actions will be allowed for each field (viewing, editing, and searching).

 [Manage Fields](#)

Fieldset: Default ▼

Display Name	Allow View	Allow Edit	Allow Search
Account	✓	✓	✓
Email	✓	✓	✓
Post Office Box	✓	✓	✓

To change settings for field in the field set, just click the required field and make required modifications. Then click “Save”.

Display Name	Allow View	Allow Edit	Allow Search	
Account	✓	✓	✓	
Email	✓	✓	✓	
Post Office Box	✓	✓	✓	
Title	✓	✓	✓	
Company	✓	✓	✓	
Description	✓	✓	✓	
First Name	✓	✓	✓	

## Creating Fieldset

You can create any amount of fieldsets and apply them for different sites of SharePoint groups.

In order to create new fieldset, click “Manage Fields” and use “Click here to add new fieldset” link.

## Fields Management

List of available fieldsets



Fieldsets are used for managing view, search and edit permissions for every AD field. You can create unlimited amount of fieldsets and use them for working with AD information. Each fieldset must have unique title. Default fieldset can be used as well.

Fieldset Title

[Click here to add new fieldset](#)

List of available field formats

Field formats are used for validating input data. Here you can add new, delete or edit existing field format.

Name	Comment	Regular Expression	
E-mail	Please type a valid e-mail here.	^[a-zA-Z0-9_%+.-]+@[a-zA-Z0-9.-]+\.[a-zA-Z]{2,4}\$	
Positive integer	Please type a positive integer number here.	^\d+\$	

Type name of new fieldset and click “Save”.

Fieldset Title

Self Service



Now it will be possible to select this fieldset for using instead of default one (settings of web part, “Edit Web Part” button).

To adjust new fieldset, select it from the list and change settings for required fields as described above.



List of available fields with view, edit and search permissions

Select fieldset for working with AD information. Define which actions will be allowed for each field (viewing, editing, and searching).

Manage Fields

Fieldset: Self Service ▼

Display Name	Allow View	Allow Edit	Allow Search	
Account	✓	✓	✓	
Email	✓	✓	✓	
Post Office Box	✓	✗	✓	📄 ➡
Title	✓	✓	✓	

Now you can add User Service web part to different pages of SharePoint and create fieldsets for working with AD.

## Active Directory Self Service Web Part Settings

Use “Edit Web Part” in the upper right hand corner of the page.

The Web Part settings will be displayed. Select the type of connection (see web part settings).

Virtto Active Directory Self User Service for SharePoint 2013 x

Virtto AD User Service Settings

**Active Directory connection settings**

☒ Use Default

☐ Use Specific

Use Fieldset:

Self Service ▼

Then select a fieldset to be used for the web part.

Virtto Active Directory Self User Service for SharePoint 2013 x

Virtto AD User Service Settings

**Active Directory connection settings**

☒ Use Default

☐ Use Specific

Use Fieldset:

Self Service ▼

Click “Apply” to save the settings and continue adjustment. Or use “OK” to save the settings and return to web part.

As a result some fields will be visible and available for editing, others will be not even shown and etc.

## Virto SharePoint Active Directory User Service Usage

### Changing AD Information

SharePoint Active Directory User Service allows users to change AD information of **other** users depending on security settings.

**Note:** users do not have to be authenticated in Active Directory for managing profiles. They will be able to manage other users' AD profiles even in case they are added to the SharePoint group with such rights. See **Who Updates Profiles** section.

Virto SharePoint Active Directory User Service web part added to the SharePoint site page looks as list of users and search line grouped by organizational units.

Virto Active Directory User Service for SharePoint 2013

The screenshot displays the 'Virto Active Directory User Service for SharePoint 2013' web part. On the left, there is a list of users with their names and profile pictures: Bernie Madeoff, Chandler Bing, Clyde Bixby, David Mann, demo demo, Gary Lapointe, John Holiday, Keith Moon, Ken Sanchez, Matthew McDermott, Maurice Prather, Scot Hillier, Spencer Reed, Ted Pattison, and Wilson Picket. On the right, there is a form for editing a user's profile. The form has four tabs: 'General', 'About Me', 'Contact Information', and 'Organization'. The 'General' tab is selected. Below the tabs are two 'Save' and 'Cancel' buttons. The form fields include: 'Account' (text input), 'First Name' (text input), 'Last Name' (text input), 'Display Name' (text input), and 'Initials' (text input). At the bottom right of the form, there are two more 'Save' and 'Cancel' buttons.

Click on required user to get information about him registered in the Active Directory.

## Virtu Active Directory User Service for SharePoint 2013

The interface shows a list of users on the left, including Bernie Madeoff, Chandler Bing, Clyde Bixby, David Mann, demo demo, Gary Lapointe, John Holiday, Keith Moon, Ken Sanchez, Matthew McDermott, **Maurice Prather**, Scot Hillier, Spencer Reed, Ted Pattison, and Wilson Pickett. The right side has tabs for General, About Me, Contact Information, and Organization. The General tab is active, showing fields for Account (MauriceP), First Name (Maurice), Last Name (Prather), Display Name (Maurice Prather), and Initials. There are Save and Cancel buttons at the top right and bottom right of the form.

The interactive search tool is available. If the list of existing users is too long, type first letter of user's name and select required user from the list of displayed ones.

## Virtu Active Directory User Service for SharePoint 2013

The search filter 'Ke' is entered in the search bar. The user list on the left is filtered to show Keith Moon, Wilson Pickett, and Ken Sanchez. The right side shows the same tabs and form fields as the previous screenshot, but the form fields are currently empty.

You will see tabs with user information (three tabs are displayed by default; see section “**Fields Management**”).

## Virtu Active Directory User Service for SharePoint 2013

The search filter 'Ke' is still applied. The user list shows Keith Moon, Wilson Pickett, and Ken Sanchez. The right side shows the same tabs and form fields. The form fields are now populated with the details for Keith Moon: Account (KeithM), First Name (Keith), Last Name (Moon), Display Name (Keith Moon), and Initials.

General	About Me	Contact Information	Organization
			<input type="button" value="Save"/> <input type="button" value="Cancel"/>
<b>Title</b>	<input type="text" value="System Administrator"/>		
<b>Description</b>	<input type="text"/>		

General	About Me	Contact Information	Organization
			<input type="button" value="Save"/> <input type="button" value="Cancel"/>
<b>Email</b>	<input type="text" value="km@virtosoft.com"/>		
<b>Mobile</b>	<input type="text" value="+123 456 789"/>		
<b>Home Phone</b>	<input type="text" value="+987 654 321"/>		
<b>Web Page</b>	<input type="text" value="km.virto.com"/>		
<b>Postal Code</b>	<input type="text"/>		
<b>Location</b>	<input type="text" value="Chicago"/>		
<b>Address</b>	<input type="text"/>		

General	About Me	Contact Information	Organization
			<input type="button" value="Save"/> <input type="button" value="Cancel"/>
<b>Post Office Box</b>	<input type="text"/>		
<b>Company</b>	<input type="text" value="VirtoSoft"/>		
<b>Department</b>	<input type="text" value="Operations"/>		
<b>Phone Number</b>	<input type="text" value="+123 456 789"/>		
<b>Physical Delivery Office Name</b>	<input type="text"/>		

Every tab includes several fields with AD information (see section “**Fields Management**”).

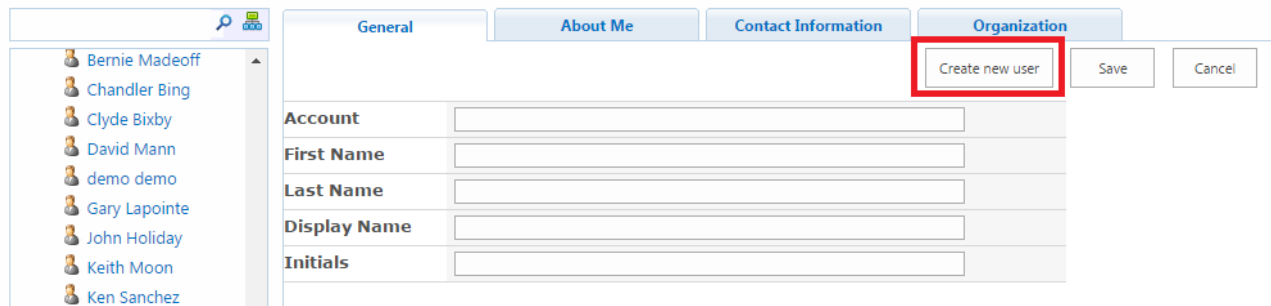
According to the Web Part settings users can edit AD information of other users, or just view or search for it.

If it is allowed for you to edit AD information, just change it and click “Save”.

## Integration with Virto Create & Clone AD User

Virto SharePoint Active Directory User Service allows integration with Virto Create & Clone AD User. In this case “Create new user” button is available on the AD User service web part page.

Virto Active Directory User Service for SharePoint 2013



The screenshot shows the 'Virto Active Directory User Service for SharePoint 2013' web part. On the left is a list of users: Bernie Madeoff, Chandler Bing, Clyde Bixby, David Mann, demo demo, Gary Lapointe, John Holiday, Keith Moon, and Ken Sanchez. On the right, there are four tabs: General, About Me, Contact Information, and Organization. The 'Organization' tab is active, and the 'Create new user' button is highlighted with a red box. Below the tabs is a form with fields for Account, First Name, Last Name, Display Name, and Initials. To the right of the 'Create new user' button are 'Save' and 'Cancel' buttons.

To adjust integration, go to “Edit web part” check the box “Show 'Create User' button” and enter page URL with Virto AD User Create & Clone web part.

### Users visibility settings

☐ Show inactive users

### Interactive search settings

Enter number of displaying search results. To show all results leave this field blank.

15

### Virto AD User Create & Clone integration options

☐ Show 'Create User' button

Page url with Virto AD User Create & Clone web part:

http://demo.virtosoftware.com

Now just click “Create a new user” button and you will be redirected to Create & Clone page.

# create-and-clone

## Virto Create & Clone AD User Web Part for Microsoft SharePoint 2013

Account *	<input type="text"/>
Password *	<input type="password"/>
Confirm password *	<input type="password"/>
First name	<input type="text"/>
Last name	<input type="text"/>
E-mail	<input type="text"/>

Available AD security groups <input type="checkbox"/> Administrators <input type="checkbox"/> Users <input type="checkbox"/> Guests <input type="checkbox"/> Print Operators	Available organizational units (OU) <input checked="" type="radio"/> Do not add to OU <input type="radio"/> Domain Controllers <input type="radio"/> virto users	Available Sharepoint user groups <input type="checkbox"/> Team VirtoSoftware Members <input type="checkbox"/> Team VirtoSoftware Owners
--	---	---

Select user for cloning [Not selected] ▼

Create new user
Cancel

## Virto SharePoint Active Directory Self Service Usage

Active Directory Self Service allows users to change information according to administrator's settings and synchronize these changes with Active Directory. Changes are registered on behalf of user defined by administrator.

There are four data blocks with information fields in the web part: "General", "About me", "Contact Information", and "Organization". The content of these tabs is defined while fields creating.

## VirtoADSelfService

### Virto Active Directory Self User Service for SharePoint 2013

<span style="border: 1px solid black; padding: 2px 10px; background-color: #e0e0e0;">General</span> <span style="border: 1px solid black; padding: 2px 10px; background-color: #e0e0e0;">About Me</span> <span style="border: 1px solid black; padding: 2px 10px; background-color: #e0e0e0;">Contact Information</span> <span style="border: 1px solid black; padding: 2px 10px; background-color: #e0e0e0;">Organization</span>		<span style="border: 1px solid black; padding: 5px 10px;">Save</span> <span style="border: 1px solid black; padding: 5px 10px; margin-left: 10px;">Cancel</span>
<b>Account</b>	<input type="text" value="km"/>	
<b>First Name</b>	<input type="text" value="Keith"/>	
<b>Last Name</b>	<input type="text" value="Moon"/>	
<b>Display Name</b>	<input type="text" value="Keith Moon"/>	
<b>Initials</b>	<input type="text"/>	
<span style="border: 1px solid black; padding: 5px 10px;">Save</span> <span style="border: 1px solid black; padding: 5px 10px; margin-left: 10px;">Cancel</span>		

Change the required fields' values and click "Save".

The same modifications will be done in the Active Directory.

## Using Security Questions for Password Resetting (Use Case)

### **Situation:**

User forgets the password. How to reset the password with an answer to a security question? How this answer is defined?

### **Solution:**

User defines an answer to a security question when he fills out a special field. Information from this field will be verified and if the answer is correct, password will be reset.

### **How to implement:**

Two web [arts are installed on a SharePoint site – **Virto SharePoint Active Directory Self Service** and **Virto SharePoint Password Reset Web Part**.

The first web part allows user to set an answer to a security question (value of the special field), the second web part enables to reset the password when user forgets it.

The following actions must be done:

1. Virto SharePoint Active Directory Self User Service installing.
2. Adding special field which will contain answer to a security question.
3. Virto SharePoint Password Reset Web Part installing.
4. Selecting field (created in 3) in the SharePoint Password Reset Web Part settings for security question answer.

### **Detailed Instruction:**

#### ***For SharePoint site administrator***

Install Virto SharePoint Active Directory User Service. Then go to "Site Actions – Site Settings".

# Site Settings

## Users and Permissions

People and groups  
Site permissions  
Site app permissions

## Web Designer Galleries

Site columns  
Site content types  
Master pages and page layouts  
Composed looks

## Site Administration

Regional settings  
Language settings  
Site libraries and lists  
User alerts  
RSS  
Sites and workspaces  
Workflow settings  
Virtio Unzip Settings  
Site Closure and Deletion  
Popularity Trends  
Term store management  
Site output cache  
Content and structure  
Content and structure logs  
Manage catalog connections  
Site variation settings  
Translation Status

**Virtio Active Directory Service Settings**

## Look and Feel

Design Manager  
Master page  
Title, description, and logo  
Page layouts and site templates  
Welcome Page  
Device Channels  
Tree view  
Change the look  
Import Design Package  
Navigation  
Image Renditions

## Site Actions

Manage site features  
Reset to site definition  
Delete this site

## Reporting Services

Manage Shared Schedules  
Reporting Services Site Settings  
Manage Data Alerts

## Search



Result Sources  
Result Types  
Query Rules  
Schema  
Search Settings  
Searchable columns

Follow the link “Virtio Active Directory Service Settings”.

Click “Manage Fields” and use “Add Field” to add new field to the list.

List of available fields with view, edit and search permissions

Select fieldset for working with AD information. Define which actions will be allowed for each field (viewing, editing, and searching).

 Manage Fields					Fieldset: <span>Default ▼</span>	
Display Name				Allow View	Allow Edit	Allow Search
Account				✓	✓	✓
Email				✓	✓	✓
Post Office Box				✓	✓	✓
Postal Code	postalCode	Contact Information	5	✓		✗
Location	l	Contact Information	6	✓		✗
Address	streetAddress	Contact Information	7	✓		✗
 Add Field						



Enter required data and pay attention to the field “AD Name” (corresponding field from Active Directory).

## New Field Adding

<b>Displayed Name *</b>	Secure answer (Pet`s name)
<b>AD Name *</b>	division
<b>Tab Name:</b>	General ▼
<b>SortingOrder *</b>	8

Click “OK”.

Location	I	Contact Information	6	✓	✕
Address	streetAddress	Contact Information	7	✓	✕
Secure answer (Pet`s name)	division	General	8		✕

■ Add Field

The field will appear in the SharePoint Active Directory Self User Service Web Part.

Virto Active Directory User Service for SharePoint 2013

- Bernie Madeoff
- Chandler Bing
- Clyde Bixby
- David Mann
- demo demo
- Gary Lapointe
- John Holiday
- Keith Moon**
- Ken Sanchez
- Matthew McDermott

General | About Me | Contact Information | Organization

Create new user | Save | Cancel

Account

KeithM

First Name

Last Name

Display Name

Keith Moon

Initials

Secure answer (Pet`s name)

Go to the site where **Virto SharePoint Password Reset Web Part** is installed. Use “Edit Web Part”.

Adjust web part for security question (see User Guide). Define the field (created with the SharePoint Active Directory User Service) as a field with an answer to security question.

Virto Password Reset Web Part for SharePoint 2013 x

Password Reset Configuration

Choose authentication mode

☒ AD authentication

☐ Form based authentication ("Use E-mail address" mode)

Choose security questions using or E-mail address for password reset

☒ Use security questions

☐ Use E-mail address

---

**Security Question**

Security Question Options ("Use security questions" mode)

Security Question #1:

Your Pet's name

AD Custom field name for answer to Security Question #1:

division

Click "OK".

### For user

Go to SharePoint site where the SharePoint Active Directory User Service is installed. Fill out the field "Secure Answer (Pet's Name)". Click "Save".

## ADUserService

Virto Active Directory User Service for SharePoint 2013

Users

- Administrator
- WebUser
- spadmin
- ftp
- tempAdmin tempAdn
- fedor dostoevsky
- ksi
- john

Demo2013 VirtoSoftware

- Margaret Anderson
- SP\_Content
- SP\_Crawler
- SP\_Farm

General About Me Contact Information Organization

Create new user Save Cancel

Account KeithM

First Name Keith

Last Name Moon

Display Name Keith Moon

Initials

Secure answer (Pet's name) Sonya

Create new user Save Cancel

***If user forgets his password.***

Go to the site with anonymous access (contact your administrator).

Virto Password Reset Web Part for SharePoint 2013

<b>User Name *</b>	<input type="text"/>
<b>Security Question:</b>	Your Pet's name
<b>Answer *</b>	<input type="text"/>

(\*)Required Fields

Enter answer to the security question. Click "Submit". If the answer is incorrect, a message will appear.

Virto Password Reset Web Part for SharePoint 2013

<b>User Name *</b>	<input type="text" value="KeithM"/>
<b>Security Question:</b>	Your Pet's name
<b>Answer *</b>	<input type="text" value="Sonia"/>

(\*)Required Fields

Some of your answers have no matches with AD data!

When the answer is correct, password will be displayed and sent by e-mail.

Virto Password Reset Web Part for SharePoint 2013

<b>User Name *</b>	<input type="text" value="KeithM"/>
<b>Security Question:</b>	Your Pet's name
<b>Answer *</b>	<input type="text" value="Sonya"/>

(\*)Required Fields

Success: the new password is: D!qC7]OHCc9bu3

## Version Release History

Release Date	Version	Description
11-19-2020	4.2.1	[*] License manager has been updated
07-08-2015	4.1.2	[*] Indirect membership checking has been added to User service web part.
02-14-2012	3.1.0	[*] User search performance has been improved. [-] Minor bug has been fixed.
01-12-2011	3.0.2	[-] Minor bug has been fixed.
09-22-2011	3.0.1	[-] Minor bug has been fixed.
09-21-2011	3.0.0	[+] Field types are added
08-26-2010	2.4.0	[+] Integration with Virto AD User Create & Clone web part has been added
05-24-2010	2.3.1	[+] First public version for SharePoint 2010
05-06-2010	2.3.0	[+] Interactive user search has been added to User Service [*] Users list view has been changed to tree view in User Service (users are grouped by Organizational Units) [*] Tabs redesign.
11-30-2009	2.2.0	AD Self User Service has been connected to User Service Settings
10-30-2009	2.0.0	Added ability to manage multiple users AD Profile
10-08-2009	First Public Release	First Public Release