



**Directify** ®

Directory Wizards Inc

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## What's in this guide?

The Directify Administrator Guide will help you:

- understand Directify and its features
- configure Directify
- set up Directify for end-user use
- troubleshoot issues with the use of Directify

## What's not in this guide?

The basics of installation and getting started are found in the Directify Release Notes - Install Guide found at [dirwiz.com/directify/doc](http://dirwiz.com/directify/doc).

Our advice? Follow directions in the Install Guide to get the Directify User Interface (UI) up and running, then come back to this guide for a more in-depth look at Directify features and configuration. That way, you can follow along and try features in the UI as you're learning.

## Who is this guide for?

While it is primarily intended for system/directory administrators who are already familiar with LDAP directory servers, it's also for anyone who wants to learn about and give Directify a try. If any concept seems confusing, please contact us at [support@dirwiz.com](mailto:support@dirwiz.com) for clarification.

## How to use this guide

First things first - we recommend you use this guide electronically as we've included links to our knowledge base for additional information, where applicable.

Directify is designed to be used with any LDAP directory - and we mean ANY! As long as Directify can communicate via LDAP, it can be used to help you help others manage directory information.

For more commonly used directory types, such as Active Directory, you have the option of selecting a template during set up that provides a head start on typical configuration. We've crafted this guide, however, to assist you in configuration no matter what directory type you are using.

In the Directify Configuration View section, we will go over the options each tab provides and instruct you how to start from scratch; as if you selected Other for the System Type at installation. Understanding the product in this way helps even if you opt to use a template.

Later, we'll explain the templates and how they give you a head start.

**IMPORTANT NOTE:** *Keep an eye out for these notes! When you see them, we're alerting you to an important bit of information.*

## How to contact us

The best way to reach most of us at once is by emailing [support@dirwiz.com](mailto:support@dirwiz.com). We can assist you via email or schedule a call or screenshare, if needed.

Refer to this knowledge base article for information on what we need to best assist you when you're having a problem. Visit our Support page for other support options.

Have an idea for a new feature? Is there something you wish Directify could do for you?

If you have ideas for new features, products, or even tiny utilities, let us know! Our development team is responsive to your needs. Contact us today at [support@dirwiz.com](mailto:support@dirwiz.com).

## About Directify

Directify, formerly known as Profiler, is a web based interface for directory management which allows the authenticated end user, or another designee, the ability to update certain administrator-defined attributes. Originally designed for Active Directory, functionality will work with **any** LDAP directory.

## How Directify works

Directify runs on a web server allowing administrators to configure the interface and end users to use it, all via web browser.

## Features and Functionality

- Windows and Linux versions available
- AES256 encryption support
- Web enabled so you can administrate from any location using a browser
- Single Sign On (SSO) supported
- Search, view, and edit person and group objects including group membership editing
- Automated creation of mail forwarding contacts
- Allow update by managers, assistants, and other appointed Admins
- Email notification of changes made in directify.cgi
- Customize for any LDAP directory - and we mean **ANY** - with templates that help you get started quickly for commonly used directories

## System Requirements

The following minimum requirements are recommended for Directify Server and Client systems:

### Server

#### Operating System

- Windows - 2003 (64 bit) or better
- Linux - 64 bit Operating System, libc v2.19 or greater

#### Web Server

- Any web server that supports CGI (i.e., Microsoft Internet Information Services (IIS) or Apache)

#### Storage

- 50mb hard disk
- Access to a domain controller for each domain (LDAP port 389 tcp)
- An administrator account ID and password with necessary permissions to update objects

#### Network

- Access to LDAP port 389 tcp each domain
- An account ID and password with necessary permissions to update objects
- The Directify server must be configured with a DNS server and a DNS Host entry created

#### Directory

- Any LDAP directory type
- Active Directory - minimum requirement AD 2008

**Client**

- Client network connection
- 56kbps
- Web Browser: Internet Explorer 10 or better, Mozilla Firefox, Chrome

**What's NOT required to run Directify**

- Microsoft .NET
- Java
- Database Software (SQL, Access etc)
- The web server does NOT need to be a member of the forest or to any domain (unless using integrated authentication)
- Client web cookies (no cookies are stored on the web browser)

## Licensing

Directify is licensed per domain. You define the domain during the Directify installation. Each domain requires its own installation of Directify.

Our technical support team is happy to assist you in determining how many Directify installations are required for your goals and environment.

## Your Key and Installation

You may request a download at any time at [dirwiz.us/download](http://dirwiz.us/download). You'll receive a temporary key with your download of the software.

Once you have purchased Directify, you are entitled to a permanent license key. To receive a permanent key, send an email to [keys@dirwiz.com](mailto:keys@dirwiz.com) and provide the Serial number specified on the Directify Configuration View (`config.cgi`) on the About tab.

Remember, your maintenance needs to be current to receive a permanent license key. If this is your initial purchase, we'll contact you regarding your permanent key once payment is received in full. If you are a current client, you may request a permanent license key if your maintenance is current.

## The Directify Maintenance Contract

The first year of maintenance is included in your initial cost and entitles you to upgrades and technical support. Renew the contract yearly, and you'll continue to enjoy access to software updates as well as speedy personal email and telephone support for your questions. Ask us anything - no request is too small - and our support specialists will get back to you with an answer.

Do you have a special request? Is there a feature you would like to see in Directify? Just ask! Our developers are always looking for ways to improve the Directify experience. We'll work with you to see if the enhancements you desire are possible.

You can reach technical support Monday - Friday, 9am-5pm EST, excluding major US holidays and honoring Daylight Savings Time (EDT). Contact us with your questions anytime at [support@dirwiz.com](mailto:support@dirwiz.com) and we'll respond during our normal business hours.

Directify supports LDAP directories with SSL installed and enabled.

The SSL port number is different than a standard LDAP port number. That is, the standard LDAP port number for Active Directory (AD) is 389, but the standard SSL LDAP port number is 636.

Security of the Directify User Interface (UI) may be controlled via IIS virtual directory share. Contact [support@dirwiz.com](mailto:support@dirwiz.com) for more information.

Please see the current Directify Release Notes - Install Guide for installation and upgrade instructions.

If you are using a supported directory, Templates are a shortcut for Directify configuration. Currently, you are able to select from *Active Directory - Exchange*, *Active Directory - LDS*, or *Active Directory - No Exchange* templates upon installation. You are also able to select *Other* for any other LDAP directory type.

If you select *Other*, you may follow the instructions in the *Directify Configuration View* article to configure Directify from scratch. Template options, however, will pre-populate Directify with commonly used options, making your configuration task easier.

If you mistakenly select an incorrect template during installation, you may reinstall to start over.

### **Active Directory - with or without Exchange**

The difference between selecting with or without Exchange for Active Directory is the inclusion or exclusion of Exchange attributes from the expanded schema.

Items that are pre-populated are:

- Forms for group, contact, and user objects with the most popular attributes already added in the Form Editor
- Search tab options including the Object Types and Attributes
- Schema override for thumbnailPhoto (JPEG) and c (countrystring) already configured properly

### **Active Directory - LDS (Lightweight Directory Services)**

Items that are pre-populated are:

- Forms for group, user, and inetorgperson objects with the most popular attributes already added in the Form Editor
- Search tab options including Object Types and Attributes
- Schema override for thumbnailPhoto (JPEG) and c (countrystring) already configured properly

You may edit, remove, or move any of the objects provided via template.



## Overview

Directify Configuration View, hereinafter referred to as config.cgi, is the highly configurable backbone of the Directify software package. Connect your directory, provision access, define search parameters and create custom forms to manage all aspects of the end-user facing Directify End User View, hereinafter referred to as directify.cgi.

**IMPORTANT NOTE:** *Description of the tabs and configuration for config.cgi refer to working with the interface from scratch - that is, selecting Other as the directory type during installation. Selecting Other gives you the ability to configure any LDAP directory type. Information detailing what is pre-populated for you when you select a specific directory type are found in the Templates article.*

## Directify Configuration View Tabs

**About Tab** View system, software, and license information. Maintain licensing.

**LDAP Tab** Authenticate and read your directory schema.

**Admins Tab** Configure additional directify.cgi administrators.

**Forms Tab** Define directify.cgi forms by object type.

**Search Tab** Manage directify.cgi search functionality.

**Notify Tab** Configure options for email notification of directory updates and establish syslogging (optional).

**General Tab** Manage additional directify.cgi options including mail forwarding.

## About Tab

The About tab contains information about the software, licensing, and your system as it pertains to the software.

The **Serial** number, found in parentheses at the top of the tab, is a unique number generated by your installation of the software. You will be required to provide it when you request a permanent key. Since the Serial number is generated each time the software is installed, you will need to request a new key if you have to move the installation to a new server.

Some of the information found on the About Tab will be familiar to you because it pertains to your system, such as Computer Name and Install Directory. You'll also find the Build ID, Current Date, the Release Date of the version you have installed, and the Software Version number.

In the lower left of the tab is the License Key entry box. Enter your key string there and press Save to retain it.

**IMPORTANT NOTE:** *While you will be able to navigate around the Directify Configuration View (config.cgi) without a key, the Directify End User View (directify.cgi) will not function and will produce an error if anyone tried to log in if a key is not saved and valid.*

Once you have saved your key information, the Key Info box on the bottom right of the page will populate with information pertaining to your licensing of Directify. Again, you will see the Serial Number and Build ID. You will also see your Customer name (as recorded in our client database), your Key Serial number, the Maint Expire date which tells you the end of your paid maintenance period, and your Maint Left which calculated the days until the end of your paid maintenance period.

**IMPORTANT NOTE:** *Maint Expire and Maint Left refer to the amount of time left on your maintenance, which refers to your ability to utilize technical support services provided by Directory Wizards and access to upgrades of the software. Your key will **not** cease to work on that date, and you will always be able to obtain a key for the last available version of the software to which you were entitled under your Maintenance Agreement. You will need to renew your maintenance, however, in order to receive ongoing technical support or to upgrade to the latest version of the software.*

## LDAP Tab

The LDAP tab allows you to identify your directory and download the schema. Once configured, it contains information about your specific directory and enables Directify to utilize the directory schema.

### IP/DNS

IP address or host name of the source system.

### Port

The LDAP port your have configured in your directory. LDAP typically uses port 389, however this can be set to any valid TCP/IP port the source server is listening on.

### SSL

The SSL parameter can be used to set the port, and may enable additional functionality.

- **No:** (default) sets standard port (389), no encryption
- **StartTLS:** allows encryption over standard non-encrypted port (389)
- **SSL/TLS - Basic:** sets SSL standard port (636), enables encryption but not expiration checking of certificates.
- **SSL/TLS - Expiration Check:** sets SSL port (636), enables encryption and expiration checking of certificates.

**IMPORTANT NOTE:** *Directory Wizards strongly recommends using SSL/TLS options if you desire encryption, but provides the StartTLS option as an alternate. If you have any questions regarding the security of your connection, please contact our Technical Support Team.*

### ID

The login ID of an administrative account.

### Password

The password that corresponds to the login ID specified.

**IMPORTANT NOTE:** *Notice that you are not able to access any tabs other than About and LDAP at this time. Once you have successfully configured the LDAP options, the other tabs will become available for configuration.*

### Test LDAP button

Clicking this will test that the information provided in the other fields is valid to provide access to the directory. When you Test LDAP, you will receive a pop-up indicating Auth Bind Success if Directify is able to connect to your directory server.

### View RootDSE

Clicking this will pop-up the unique RootDSE of the defined directory server. It provides data about the server, such as its capabilities, the LDAP version it supports, and the naming contexts it uses.

### Save

Click this button to save the credentials supplied and load the schema. Once the LDAP information is successfully saved, the rest of the tabs will become available for configuration.

Depending on the size of your directory, you may see the interim Saving pop-up for several seconds. Once the schema is successfully read and saved, you will see confirmation.

Finally, you'll notice that once you have a successful connection to your directory, the rest of the configuration tabs become available to you.

The Admins tab allows you to configure optional additional administrators for the Directify End User View (directify.cgi) and manage their access.

By default, an end user is able to edit their own record and no others. The Admins tab allows you to change this default behavior and control which additional users, if any, are able to edit other user objects in the Directify End User View (directify.cgi).

### User Permissions

By default, the first option in the User Permissions box is checked, and therefore, enabled. This option allows users to edit their own object when logged in to directify.cgi. If you want users to ONLY view their own objects and NOT edit them, you may click to remove the check from this box.

The second option available in the User Permissions section allows you to designate other users who have permission to edit an object if they are defined within that particular object, such as a manager or assistant.

Simply select the attribute where the alternate editor is identified. For example, if you select *manager*, the person identified as the manager of a particular object would be able to edit that users' information. Notice that you may select more than one attribute here. If, in addition to *manager* you also select *assistant*, you'll see that 2 Attribute(s) Selected appears at the top of the drop-down list, and those identified as manager or assistant of a particular person object will also be able to edit that object.

Make sure to also click the check box and Save if you would like to enable this feature. Merely selecting attributes in the drop-down will not enable this feature unless the check box is also selected.

### Administrators

You may want to add other individuals who are permitted to edit objects other than their own or create new objects. Administrators identified here may be configured differently than those identified in the User Permissions section above.

Let's start with the bottom of the box, in the field adjacent to the Search button. This is where you add additional Administrators who are permitted to edit and create objects via Directify.

Simply enter part of a user name and click Search.

A pop-up will open with suggestions based on your search.

Click in the check box next to the object then click Add to set as an additional Directify Administrator.

You can add as many Administrators as you like, and removing this is as easy as clicking the minus sign to the left of the object.

**IMPORTANT NOTE:** Notice the difference between adding an admin here, in the Administrators box versus the first option of adding one in the User Permissions box. If you add an admin that is defined in the user object itself, they will **only** have access to the object that defines them and only have edit capabilities. Any admin added here will be able to edit **ANY** object included in the LDAP Search Base. By default, this is the root of your directory. Other options in the Administrators box will help you limit edit access and enable object creation, if desired.

Now that you've added other Administrators, you can define what they can and cannot do. First, you are able to restrict their editing capabilities to their own container, including sub-containers or not. Once you've selected an option, be sure to check the box to enable this feature.

You may also grant Directify Administrators the ability to create new objects - any object type that is included in your directory schema. They will only be able to create objects in the container that you specify.

When you access the drop-down, you'll see that your root level containers populate the list. Select the container where you'd like to allow Admins to create contacts. Then be sure to click the box to enable this feature.

**IMPORTANT NOTE:** Notice that you may restrict Directify Administrators edit access to their own container (and sub-containers, if selected) **and still** set a completely different container the same Administrators to create objects. If both options are utilized, the Administrator will be able to edit within the containers they are restricted to, as well as in the container specified for object creation, by design.

As with any tab, remember to Save your options on the Admins tab before clicking over to another tab.

Finally, any Admin added here will be able to edit attributes set to Admin edit in your forms. More information on this feature is found in the section regarding the Forms tab.

On the Forms tab, you will create forms for editing and creating objects, and determine which attributes will be visible and/or editable on `directify.cgi`. You may configure both forms for edit and forms to create for multiple object types each.

**IMPORTANT NOTE:** *In this section, we will first discuss the Forms tab and how to create a form. At the end of the section, we will detail the difference between Edit and Create form types.*

### Form List

It's easy to add a new form! Simply select the desired object type from the drop-down at the top of the tab. Then click the + button to the right to add the form.

You'll receive a pop-up asking you to choose which type of form you'd like to add - Edit or Create.

Note that you will only be able to configure one form for each object type in Edit Forms and Create Forms. If you attempt to add more than one form for an object type you'll receive a warning that the Form already exists.

To remove a form at any time, click the trashcan icon on the right.

The other icon is a pen and will take you to the Form Editor.

### Form Editor

In the Form Editor view, everything you see above the double lines is a tool that allows you to add form items. As you include different items, note that each will be added to the bottom of the form. We'll show you how to manage the order of items a little later.

### Add Headings

You can add Heading lines by clicking the Heading button in the upper left of the Form Editor box. When you do, a new Heading line is added.

By default the text *New Heading* will populate the Heading line. Simply replace that text with your desired Heading. If you want a blank space, you may blank out the field to add a blank Heading if you so choose.

**IMPORTANT NOTE:** *If you not replace the text or blank it out, New Heading\* will remain and show on your end user form.*

A blank Heading will appear as a blue line on the `directify.cgi` form. To remove a Heading, simply click the - (minus/dash) button on the right end of the line.

### Add Text

Perhaps you'd like to include instructions somewhere on your form. Click the Text button to add descriptive Text to your form. When you do, a new Text line is added.

Simply type your text into the blank text box that appears here. To remove a text line, simply click the - (minus/dash) button on the right end of the line.

### Add Attribute Lines

Attribute lines are the most important part of the form. This is what enables your end user to manage their own information.

All available attributes for your directory are listed in the attribute drop-down. Simply select an attribute from the list, then click the + (plus) button to the right of the drop-down to add it to your form.

Once added, in each attribute line you'll see the name of the attribute both on the right and on the left in an editable field. You may replace the text in the field so that the end user sees a more descriptive title for the field.

For example, name attributes in Active Directory are givenname and sn. By using the editable fields, you may name these form lines First Name and Last Name instead.

For each attribute, you can determine who can edit it via form:

- **Allow Edit:** Any logged in user may edit this attribute for their own object. Additionally, alternate editors specified in the User Permissions section of the Admins tab may edit this attribute for those objects they have permission to edit.
- **Admin Edit:** Only Admin's specified on the Admins tab may edit this attribute.
- **View Only:** Logged in users can view this information, but no one may edit this attribute.

Once you have built your form to your specifications, be sure to click the Save button at the bottom of the tab before exiting the Form Editor view to retain your configuration.

**IMPORTANT NOTE:** \*If you would like to use available mail forward options described in our General Tab section, you will need to add one or two fields to the default form - `_exchange-mailforward` and `deliverandredirect` (optional). The former provides a field where the user enters the email address to forward email to, and you will find it at the end of the drop-down list of attributes. The latter will add a check box that a user can select to initiate maintaining a copy of each message in the mailbox while also forwarding. Review the General Tab section for more information on this feature.\*

You may control the data an end user may select in the End User View (`directify.cgi`) by using Pre-Defined Values and Macros.

On many Attribute lines in the Form Editor you'll see a turned-down page icon on the right end. Click this icon to configure Pre-Defined Values.

Enter your desired Pre-Defined Values in the box, one value per line. For example, you may want to use Pre-Defined Values for the Company or Department attributes so that the attribute data is consistent.

Now, if you would like to link other attributes to a selection, use the Link Value Selection To: drop-down.

Say you have three Company names for three different physical locations:

- Acme East - 111 Eastern Blvd, Easthaven, NY 12345
- Acme Central - 222 Central Ave, Centralia IL 23456
- Acme West - 333 West Rd, Westville, CA 34567

You can link the fields for street address, city, state, and zip code to the company name selection to populate those fields with consistent information.

So, first, enter your company names into the Pre-Defined Values box for the Company attribute:

```
Acme East
Acme Central
Acme West
```

Then, go to the `streetAddress` attribute and enter the appropriate values there, matching line for line with the company values:

```
111 Eastern Blvd
222 Central Ave
333 West Rd
```

Finally, select the Company in the Link Value Selection To: drop-down just under the entry box.

Now, when an end user selects a value for Company, the Street Address data will populate and cannot be changed or edited. Repeat these steps for City, State, Zip, and Country if desired, and all values will populate, resulting in consistent attribute data in your directory.

### Deleting Form Parts

Delete unneeded Heading, Text, Attribute lines by clicking on the - (minus/dash) button at the far right of the line. Don't worry if you hit this button by mistake - you will be asked to confirm the deletion before it occurs.



### **Moving Form Parts**

The up/down arrow icon on the far left indicates that all form parts can be re-ordered. Click and hold to move the item line.

Don't forget to click the Save button at the bottom of the form to save the form. Leaving the tab without clicking Save will reset any changes you have made. Click Close to leave the Form Editor view of the Forms tab. Doing so will return you to the Form List view.

### **Edit and Create form types**

In the Form List section, while creating a form, you are prompted to decide which type of form you would like to create - one for Edit or one for Create.

**Edit forms** are the ones that the majority of end-users will utilize to edit their own person object. This is the default form they will see when they authenticate to Directify. If their person object in the directory is a contact object, they will see the Edit form for a contact object, while if their person objects is a user, they will see the Edit form for a user object.

**Create forms** are those that only Directify Administrators will use to create a new person object in the Directory.

You'll notice that Create forms have all the same form parts as Edit forms and you can manipulate all the same form parts. There is really no difference in how these forms appear in the Form Editor view on config.cgi, except you'll notice a designation in the top bar of the form.

The Search tab provides options to define search capabilities on `directify.cgi`.

## Search Options

In the Search Options section, you can set the number of search results you'd like to display as well as a specific location in your domain structure to search.

The Result Limit is a simple drop-down selection - simply choose the number of results you'd like to return. The default is 10.

By default, the LDAP Search Base is the root of your domain. If you click the Guess button, that root will automatically fill in the field. You may limit search capabilities to just part of your structure by entering the fully qualified domain name (FQDN).

**IMPORTANT NOTE:** *Configuring Directify different for distinct parts of your domain is possible with additional installations of Directify. Please contact [support@dirwiz.com](mailto:support@dirwiz.com) for more information.*

## Object Types

Define the types of objects you'd like returned.

Typically this will be person and group objects, but you may add any available object type here. Simply select each object type from the drop-down menu.

Click the + (plus) button to add it.

You may delete an object type by clicking the - (minus/dash) button.

## Attributes

Which attributes would you like to search? In addition to including name attributes, perhaps you'd like to search by employee number or some other unique attribute. You may configure Directify to search as many or as few attributes as you'd like.

Simply select each desired attribute from the drop-down menu.

Then click the + (plus) button. You may add as many attributes as you would like.

You may delete an attribute by clicking the - (minus/dash) button.

Don't forget to click the Save button to save the configuration for this tab.

The Notify tab allows you to configure optional notifications and syslogging.

## SMTP Server

These settings are required to enable email notifications. If you do not wish to enable email notifications, leave this section blank.

All notification include details regarding the changes made including:

- cn of object modified
- remote IP of user
- logged in user
- attributes edited and whether information was added, modified, or deleted

**Server:** TCP/IP address (or host name) of an SMTP server. This is required information. If left blank, all SMTP notifications will be disabled.

**From Address:** This is a standard SMTP address such as support@dirwiz.com. this address is included in the message sent from Directify.

**Subject:** Specify a subject you would like for the notifications.

**Notify options:** Select whom you would like to receive notifications, as follows:

- **Notify User Object** - will notify the user whose object is changed via directify.cgi. This can be the authenticated user themselves updating their own information, or a change made by another designee determined on the Admins tab. Click the box to enable.
- **Notify User Object's ,attribute.** - will notify the object identified in a particular field such as manager or assistant. Once you click this option it will notify the object specified in the drop-down. So, for example, if you specify the manager attribute here, a user's manager will be notified when changes are made to any of their direct reports if they are specified in that user objects manager attribute.
- **Recipients** - add additional recipients to receive all updates here. You may want to add your Directify Admin or an HR contact, for example. First, search for the person object in the field, then click the + (plus) button to add it. You may remove Recipients by clicking the - (minus/dash) button to the left of the added Recipient.

**Test SMTP:** to test your SMTP settings, click the Test SMTP button.

You will receive another pop-up that tells you whether the test was successful or not.

Once the SMTP tab is configured to your specifications, be sure to click Save at the bottom before exiting the tab.

## Syslog box

Configure optional syslogging. Simply add your suslog server, and select the desired Log Level.

You may test your Syslog settings by clicking the Test Syslog button.

Make sure to Save your Syslog options at the bottom of the tab before clicking to another tab.

Additional configuration options are available on the General tab.

## User Interface

The User Interface box provides configuration options for additional features.

The first section is **Login Screen**. This section allows you to fill in required elements for login to `directify.cgi` that remain consistent among end-users. Either the domain prefix or suffix are required for login. So, you may configure one or the other here so that end-users need only enter their login ID to authenticate.

**IMPORTANT NOTE:** *The required format for the Login Screen will differ by directory type. For Active Directory, only Prefix or Suffix may be used. However, with AD LDS, both must be defined. If you'd like more information or assistance configuring this option, please contact [support@dirwiz.com](mailto:support@dirwiz.com).*

The **Customization** section gives you additional control over the end-user interface.

*Page Title* allows you to set a custom title that appears on the `directify.cgi` login screen, on the browser tab, and in the top bar of your browser when the tab is active. If you leave the Page Title blank, the Directify name will appear with version number.

*Disable Search* will do just that when enabled - end-users who login via `directify.cgi` will be able to edit their own object but will not be able to search for any other.

**IMPORTANT NOTE:** *If you have defined other Admins on the Admins tab, be aware that those Admins will not have the ability to access additional objects if you have disabled search.*

*Session length* allows you to set how long a user may be logged into `directify.cgi` and idle before timeout. The default for this setting is 5 minutes. You may increase it up to 60 minutes.

*JPEG Size Limit* allows you to prevent users from uploading a .jpeg or .jpg file that is outside your parameters should you have a user photo option in your directory.

**IMPORTANT NOTE:** *JPEG Size Limit is calculated in bytes. For example, 10240 bytes=10 kilobytes.*

## Exchange Options (Active Directory with Exchange only)

This feature allows end users to set up, edit, activate, and deactivate their own email forward information.

In this section, we will guide you to configure some of the parameters for this optional feature. Additionally, a few things will need to be done away from the General tab for this functionality to be fully configured.

First, you will need to create a container (OU) in your directory to store automatically created contacts. This container must be off the root of the domain, i.e. `ou-Directify Auto-Created Contact,dc=domain,dc=com`.

Once the OU is created, refresh `config.cgi` and you should be able to find it in the *Organizational Unit* drop-down. The container you create should be intended for Directify use only. Directify mail forwarding function is designed to delete any contact in the folder that is not being used.

Another feature configured here is *SMTP Domain Restrictions*, if there are any. If you've had trouble with email forwarding to a certain domain, simply list it here. Use @ preceding the domain name, and separate multiple domains with a | (pipe) symbol.

If an end user tries to configure a forward to an email address containing that domain, they will receive an error message.

By default Directify will maintain the OU containing the mail forward contacts. That is, once an end user has removed their forwarding email address on `directify.cgi`, the corresponding contact previously created will be deleted. It maintains this information by using the `altrecipientBL` attribute information.

**IMPORTANT NOTE:** *Directify will ONLY delete contacts in the OU that you created and specified for this purpose. Directify will NEVER delete an object outside this specific OU.*

You do have the option to turn off this default behavior and maintain the contact in the specified OU by checking *Disable remove of unused auto-created contacts in OU*. When checked, the delete function is disabled. When the end user removes their mail forward address, the mail forward contact is NOT deleted. If the same user enters the same forward address again in the future, Directify will use the contact previously created.

You may also opt to hide these auto-created contacts in your GAL. To do so, simply check the box labeled "Hide auto-created contacts from Exchange address lists".

Make sure to click Save once you've configured your desired options.

In order to make this option available to your end users to configure on `directify.cgi`, you will also need to revisit your Forms tab and add one or two attributes:

- `_exchange-mailforward` - this attribute will provide a field for users to enter their email forwarding address on the end user form
- `deliverandredirect` (optional) - this option will provide the user the option to retain email in their mail account AND send a copy to their forwarding address. If this attribute is not included on the form, or if it is not selected by the end user, your default policy for email forwarding will apply.

Each user will first need to authenticate in `directify.cgi` prior to having the ability to view and edit their own information. How `directify.cgi` appears to the end user next is largely dependent on how you've configured it to look. Once the user authenticates, they will be taken directly to their record.

Users may search for other users by default, but may not edit their information. When they search for another user, the information shown will look similar to their own, but none of the fields will be editable - unless, of course, the logged in user is a specified Directify Admin or other user designated by attribute to be able to edit another person object.

If the logged in user is a Directify Admin and the ability to create objects has been defined on the Admins tab and an appropriate form created, you will also see a button to Create Object.

On the Directify user page, there are 3 parts you can customize:

1. The logo on the User login page: Add the desired picture/logo by adding the jpg picture file to `\cgi` directory, named as `logo.jpg`. (i.e. `\Directify-v7.0\cgi\logo.jpg`)
2. On the Directify Admin General tab, enter a custom Page Title (this changes the text below the login boxes as well as the browser tab's page title).
3. Customize Login ID/password labels by adding these lines to your `config.txt`. The defaults are Login ID and Password, but you can name them anything you'd like. Find `config.txt` in the data directory (`\Directify-v7.0\data\config.txt`). The lines to add for each are:  
**pageid=Your Desired text for ID**  
**pagepw=Your Desired text for Password**

Creating a back-up of Directify is just like backing-up a directory. To back-up, simply zip and/or copy all of the Directify files found in your Directify installation to another location.

To restore Directify, copy the entire Directify back-up directory and paste to the original location.

You may need a new license key. If you receive a license error, contact [keys@dirwiz.com](mailto:keys@dirwiz.com) for a new key. You will need to provide the Serial Number found on the About tab of config.cgi.

Each Directify installation is licensed to run on a specific server identified by the Serial Number found on the About Tab in the Directify Configuration View (config.cgi).

Licensing rules apply when reinstalling or moving Directify to another server. The serial number is unique for every install, so you'll need a new license key. To obtain one, contact [keys@dirwiz.com](mailto:keys@dirwiz.com). Let us know the original licensed Serial Number (prior to reinstalling or moving) as well as the new Serial Number as it appears on the About tab. See the licensing section for more information.

To move Directify to a new server, transfer the program files and connection information to the new server in one of two ways.

**Recommended:** Copy the entire Directify directory from the original location to the new server.

OR

Run the Directify installation program on the new server. Next, copy the following folder and files to move the configuration data files to the new server:

`\directify\data\forms \directify\data\*.txt` (excluding `key.txt` as you will need to request a new key)

You will also need to reconfigure your IIS virtual directory to point to the new location.



There is no uninstall program. You can simply delete your Directify directory. We suggest you back-up the directory first in case you want to reinstall later. There are no registry entries to clean up. You will want to remove the Directify IIS virtual directory.

**FAQ**

Visit the knowledge base for help with most questions: [dirwiz.com/kb](http://dirwiz.com/kb)

**Contacting Support**

Email use at [support@dirwiz.com](mailto:support@dirwiz.com) or visit [dirwiz.com/support](http://dirwiz.com/support) for phone support options.