DIRECTIFY®

Administrator's Guide

DIRECTORYWIZARDS

About this Guide

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 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.

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 play around in the configuration interface 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 for clarification.

How to use this guide

Directify is designed to be used with any LDAP directory – and we mean <u>ANY</u>. 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 templates and how they give you a head start.

IMPORTANT NOTE: *Keep an eye out for our logo! When you see it, 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. We can assist you via email or schedule a call or webex 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 any 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.

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Introduction

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 has been expanded so that Directify will work with <u>any</u> 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.
- 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 – that means ANY – with templates that help you get started quickly for commonly used directories

System Requirements

Server Operating System

- Windows 2000 or better
- Linux
- must run on 64 bit OS

Web Server

- Any web server that supports CGI, such as 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

Client

- Any web browser that supports javascript and CSS

Browser

- Internet Explorer 10 or better
- Firefox 6 or better
- Chrome 6 or better

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. (Except for integrated authentication)
- Client web cookies—no cookies are stored on the web browser

See detailed and up-to-date requirements in our [knowledge base](#).

Licensing and Upgrades

Whether this is your first Directify experience or you are an old friend, there are a few things to note about licensing and upgrades.

If you are new to Directify, by now you should have at least a temporary license key and a download link. If not, you may visit our [Download page](#) any time—24 hours a day, 7 days a week—to request an automated download link and temporary key. If you have any trouble receiving this information, please email support@dirwiz.com and we'll send you what you need on our next business day.

If this is an upgrade from a prior version, you'll need a current Directify maintenance contract to obtain a license key. If your maintenance is current, send us an email at keys@dirwiz.com with the Serial Number, found on the Directify Configuration View (config.cgi) About Tab, to receive an updated key. Don't have a current contract? Yes, you guessed it. Email us at sales@dirwiz.com and we'll help you get up to date. However, please feel free to use the temporary license provided to start setting it up.

If you are moving Directify to another server/drive/directory, you'll need a new license key. Send us an email at keys@dirwiz.com with the Serial Number of the new installation, found on the Directify Configuration View (config.cgi) About Tab. With that, we'll provide you an updated key for your new installation.

When everything is all set and you have a permanent Directify license key, copy the license key

string and save it on the Directify Configuration View (config.cgi) About Tab to keep things running without interruption.

The Directify Maintenance Contract

The first year of technical support and maintenance is free when you purchase licensing. 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 question(s). 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 make the Directify experience more personal. We'll work with you to see if enhancements are possible.

You can reach technical support Monday – Friday, 9am-5pm EST[1] via email at support@dirwiz.com or phone at 302.482.8004 (option 2 for support).

Security

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) and Exchange 200x (Ex200x) is 389, but the standard SSL LDAP port number is 636.

Security of the Directify UI may be controlled via IIS virtual directory share. Contact support@dirwiz.com for more information.

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[1]excluding major US holidays and honoring Daylight Savings Time (EDT)

Installing Directify

Please see the current Release Notes – Install Guide for installation and upgrade instructions: www.dirwiz.com/directify/doc/

Templates

If you are using a supported directory, Templates are a shortcut to configuration. Currently you are able to select from *Active Directory – Exchange*, *Active Directory – LDS* (Lightweight Directory Services), 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](#) section to configure from scratch. Template options, however, will pre-populate Directify with commonly used options, making your configuration easier. The difference between selecting with or without Exchange for Active Directory is the inclusion or exclusion of Exchange attributes from the expanded schema.

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

Active Directory – with or without Exchange

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 Object Types and Attributes.
- Schema override for thumbnailPhoto (JPEG) and c (countrystring) already configured properly.

Active Directory – LDS

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.

Directify Configuration View (config.cgi)

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 *section.*

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 tries 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 calculates 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 <u>not</u> 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 you 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.
Yes – Basic: sets SSL port (636), enables encryption but not expiration checking of certificates.
Yes – Expiration Check: sets SSL port (636), enables encryption and expiration checking of certificates.

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.

Admins Tab

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 objects 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 dropdown 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 them 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 for 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.

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 do 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,

simple 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 field, you may name these form lines First Name and Last Name instead.

In the middle of the line is a selection box allowing you to determine whether an attribute should Allow Edit or be View Only in the end-user facing directify.cgi. This way, you can provide view only access of some attributes, but allow users to update others.

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*
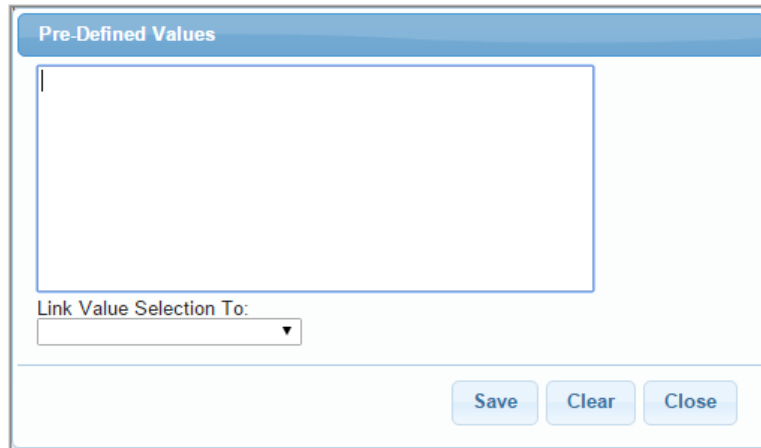- *deliverandredirect (optional)*

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.*

Controlling Attribute Data with Pre-Defined Values and Macros

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.

Illustration 1: Form Editor: Pre-Defined Values pop-up

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:

Illustration 2: Form Editor: Pre-Defined Values - Company

Then, go to the Streetaddress attribute and enter the appropriate values there, matching line for line with the Company values. Finally, select Company in the Link Value Selection To: drop-down, like this:

Illustration 3: Form Editor: Pre-Defined Values - Streetaddress linked to Company

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

Deleting Form Parts

Delete unneeded Heading, Text or 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 object 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.

Search Tab

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.

IMPORTANT NOTE: *Configuring Directify differently for distinct parts of your domain is possible with additional installations of Directify. Please contact* 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.

Notify Tab (Optional)

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 notifications 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 a 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 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 syslog 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.

General 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 direcitfy.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.*

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 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. In the example shown, 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 Contacts, 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 (see more information about this function and a way to change the default below).

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.

Directify End User View (directify.cgi)

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.

Below, find an screenshot showing an example of how the default user form looks in directify.cgi.

Illustration 4: Directify.cgi - default user edit form included in Active Directory template

Users may search for other users by default, but may not edit their information. When they do, the

information will look similar but none of the fields will be editable.

Illustration 5: Directify.cgi – Create contact object form included in Active Directory template

If the logged in user is a Directify Admin the ability to create objects has been defined on the Admins tab and an appropriate form is created, you will also see a button to Create Object. Above is an example of a form to create a contact which is pre-loaded with Active Directory templates.

Back-up and Restore

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 \Directify to an another location. To restore Directify, copy the entire \Directify back-up directory and paste to the original location or to a new server.

You may need a new license key. If you receive a license error, contact keys@dirwiz.com for a new key.

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

Move or Reinstall Directify

Each Directify installation is licensed to run on a specific server identified by the serial number found on the Directify About Tab on the Directify UI.

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. Let us know the original licensed serial number (prior to reinstalling or moving) and the new serial number as it appears on the Directify 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.

Uninstall Directify

There is no uninstall program. You can simply delete your \Directify directory. We suggest you backup 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.

Troubleshooting

FAQ

Visit the the knowledge base for help with most questions. http://www.dirwiz.com/kb

Contacting Support

Email us at support@dirwiz.com or visit dirwiz.com/support for phone support options.

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