One Identity Password Manager for AD LDS 5.9.6

Administration Guide
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Legend

💥 WARNING: A WARNING icon indicates a potential for property damage, personal injury, or death.

⚠️ CAUTION: A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

ℹ️ IMPORTANT, NOTE, TIP, MOBILE, or VIDEO: An information icon indicates supporting information.

Password Manager for AD LDS Administration Guide
Updated - November 2021
Version - 5.9.6
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About Password Manager

Password Manager for AD LDS Overview

One Identity Password Manager for AD LDS (Active Directory Lightweight Services) is a Web-based application that provides an easy-to-implement and use, yet highly secure, password management solution. Users can connect to Password Manager by using their favorite browser and perform password self-management tasks, thus eliminating the need for assistance from high-level administrators and reducing help desk workload. The solution offers a powerful and flexible password policy control mechanism that allows the Password Manager administrator to ensure that all passwords in the organization comply with the established policies.

Password Manager for AD LDS allows managing users that do not have accounts in the Active Directory. For example, using Password Manager for AD LDS you can manage passwords for contractors and other external users.

Integration with One Identity Quick Connect Sync Engine, Redistributable Secret Management Service facilitates cross-platform password synchronization that enables Password Manager to change.

The key features and benefits of Password Manager for AD LDS include:

- **Global access.** Password Manager for AD LDS provides 24/7 and 365 days access to the Self-Service site from intranet computers as well as via Internet from any most common browser. The solution supports flexible access modes and logon options.

- **Strong data encryption and secure communication.** The solution relies on industry-leading technologies for enhanced communication security and data encryption.

- **Cross-platform password synchronization.** Password Manager for AD LDS has been designed to use One Identity Quick Connect Sync Engine, Redistributable Secret Management Service, which makes it possible to automatically synchronize users’ passwords across multiple connected data sources.
- **Web interface for a helpdesk service.** Password Manager for AD LDS features the Helpdesk site which allows administrators to delegate helpdesk tasks to dedicated operators. These tasks include resetting user passwords, managing users' Questions and Answers profiles, and assigning temporary passcodes to users.

- **Email event notifications.** Administrators can configure event notifications that are sent by email to designated recipients when specified events occur.

- **Powerful password policies.** Password Manager for AD LDS ensures that only passwords that meet administrator-defined policies are accepted. Unsuccessful authentication attempts are logged and the corresponding accounts are locked if necessary.

- **Granular policy enforcement.** Password policies are applied on a per-group or per OU basis.

- **Questions and Answers authentication mechanism.** To reset passwords or unlock accounts, users are prompted to answer a series of questions for which users provide their secret answers when registering with Password Manager for AD LDS.

- **Enhanced user name search options.** Users can be allowed to view their account attributes, such as user logon name, first name, display name, and SMTP address, when searching for their forgotten user names. A more specific search query returns the most relevant search results.

- **Fault tolerance and scalability.** Password Manager for AD LDS is designed to work with network load balancing clusters and in a Web farm environment.
Getting Started

Different Site for Different Roles
Password Manager for AD LDS Components
Licensing
Checklist: Installing Password Manager for AD LDS
Installing Password Manager for ADLDS
FailSafe support in Password Manager
Specifying Custom Certificates for Authentication and Traffic EncryptionBetween Password Manager Service and Web Sites

Different Site for Different Roles

The Web Interface allows multiple Web sites to be installed with individual, customizable configurations. The following is a list of Web sites that are available out-of-the box.

- **Administration site** is designed for individuals who are responsible for implementing password self-management tasks and password policies to suit the specific needs of their organization.

- **Helpdesk site** handles typical tasks performed by helpdesk operators, such as resetting passwords, unlocking user accounts, assigning temporary passcodes, and managing users' Questions and Answers profiles.

- **Self-Service site** provides users with the ability to easily and securely manage their passwords, thus eliminating the need for assistance from high-level administrators and reducing helpdesk workload.

  - **Password Manager Self-Service site** In the Password Manager version 5.9.6, you have the option to access the Password Manager Self-Service site. The Password Manager Self-Service site provides functionality similar to the Legacy Self-Service site. The Password Manager Self-Service site includes enhancements to the user interface to improve the usability of the site. The Password Manager Self-Service site and the Legacy Self-Service site can co-exist and it is possible to revert to the Legacy Self-Service site.
In the Password Manager version 5.9, you have the option to access the Password Manager Self-Service site. The Password Manager Self-Service site contains all the functionality similar to the existing Legacy Self-Service site, with a new and improved user interface.

## Password Manager for AD LDS Components

Password Manager for AD LDS includes the following components:

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
<th>Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password Manager for AD LDS x64</td>
<td>The suite of role-based sites that expose the functionality of Password Manager for AD LDS to end users.</td>
<td>Required</td>
</tr>
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</table>

**NOTE:** It is recommended not to install Password Manager on the machine where Domain Controller (DC) server is installed.

## Licensing

The Password Manager license specifies the maximum number of user accounts in the Password Manager across all domains. The Admin can identify whether the installation is legally compliant or not by running the User Status Statistics (USS) tasks, where the scheduler counts the actual number of user accounts, and compares it with the maximum number specified by the license. If a deviation occurs between the actual licenses purchased and the number of users using it, the status of the license changes accordingly in the Admin site indicating whether the installation is compliant or not.

To view the compliance statuses of the license:

1. Login to the Admin site.
2. On the left pane, click **Licensing**. The Licenses page appears.
3. Click the **Licenses** tab and view the **Compliant** column.

In the Licenses page, you can view the licensing information of both Password Manager and Telephone Verification, if needed.
The table below provides more information on various compliant status.

<table>
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<tr>
<th>Conditions</th>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>If the total number of users in the user scope exceeds the purchased license or if the license expires</td>
<td>![image]</td>
<td>Appears when the license is not compliant.</td>
</tr>
<tr>
<td>If the total number of users in the user scope matches with the purchased license or when the user count does not exceed, and the license does not expire</td>
<td>![image]</td>
<td>Appears when the license is compliant.</td>
</tr>
<tr>
<td>If the total number of users exceeds the purchased license or if the license expires</td>
<td>![image]</td>
<td>Appears when clicking the license is not compliant. By clicking this icon, a pop up window appears indicating the reason for not being compliant.</td>
</tr>
</tbody>
</table>

To view the license number, navigate to the **About** section in the Administration site and click **Licenses** tab. The License Number appears.

In the event of a license violation, you have the following options

- Exclude the additional number of user accounts from the user accounts managed by Password Manager for AD LDS to bring your license count in line with the licensed value and run the User Status Statistics (USS) scheduled task in the Administration site to recalculate and display the new user counts.
- Remove one or more managed AD LDS instances to decrease the number of managed user accounts.
- Purchase a new license with a greater number of user accounts, and then update your license using the instructions provided later in this section.

Note that the following items are not limited by the license

- The number of computers connected to the Administration, Self-Service, and Helpdesk sites of Password Manager for AD LDS.
- The number of Password Manager instances in a large enterprise, Password Manager for AD LDS can be installed on multiple computers for enhanced performance and fault tolerance.

### Installing the License

The license is initially installed when you install the Password Manager for AD LDS:
1. In the Installation Wizard, click **Licenses** to display the **License status** dialog box.

2. Click **Browse license**, locate and open your license key file using the **Select License File** dialog box, and then click **Close**.

Some license types may include counters for managed persons and managed external persons along with a counter for user accounts. Managed persons are users that have several accounts; for example, one managed person can have three user accounts. Managed external persons are external or temporary employees. The same license violation policy is applied to managed persons and managed external persons as to user accounts. To specify these user groups, use the corresponding license scopes after you install Password Manager for AD LDS.

Note, that such scopes are available only if your license includes managed persons and managed external persons.

**To add AD LDS instance to the managed persons scope**

1. On the menu bar of the Administration site, click **Licensing**.

2. On the **Licenses** page, click the **Managed Persons** tab.

3. On the **Scope of Managed Persons** page, click **Connect to AD LDS instance**.

4. If connections already exist, select a connection from the list. If you want to create a new connection, click **Add new connection**.

5. If you selected to create the new connection, in the **Connect to AD LDS Instance** dialog, configure the following options:

   - In the **Server name on which AD LDS instance is installed** text box, type the name of the server to which you want to connect.
   - In the **Port number (LDAP or SSL)** text box, enter the port number that you specified when installing the AD LDS instance. If you select the **Use SSL** check box, enter the SSL port number; otherwise, LDAP port number. It is recommended to use SSL in your production environment.
   - In the **Application directory partition** text box, enter the name of the application directory partition from the AD LDS instance to which you want to connect.
   - In the **Application directory partition alias** text box, type the alias for the application directory partition which will be used to address the partition on the Self-Service site.
   - In the **Access account** section, select **Password Manager Service account** to have Password Manager access the AD LDS instance using the Password Manager Service account, otherwise, select **The following Active Directory account or The following AD LDS account** radio button and enter the required user name and password.

   For information on how to prepare the access account, see **Configuring Permissions for Access Account** on page 59.

6. Click **Save**.
**To specify groups or OUs included in the scope of managed persons**

1. On the menu bar of the Administration site, click **Licensing**.
2. On the **Licenses** page, click the **Managed Persons** tab.
3. On the **Scope of Managed Persons** page, select the connection for which you want to specify groups or OUs and click **Edit**.
4. Do the following:
   - To specify the groups, click **Add** under **Groups included into the scope of managed persons**.
   - To specify the OUs, click **Add** under **Organizational units included into the scope of managed persons**.
5. Click **Save**.

**To specify groups or OUs excluded from the scope of managed persons**

1. On the menu bar of the Administration site, click **Licensing**.
2. On the **Licenses** page, click the **Managed Persons** tab.
3. On the **Scope of Managed Persons** page, select the connection for which you want to specify groups or OUs and click **Edit**.
4. Do the following:
   - To specify the groups, click **Add** under **Groups excluded from the scope of managed persons**.
   - To specify the OUs, click **Add** under **Organizational units excluded from the scope of managed persons**.
5. Click **Save**.

You can use the procedures below to specify the scope of managed external persons.

**To add AD LDS instance to the managed external persons scope**

1. On the menu bar of the Administration site, click **Licensing**.
2. On the **Licenses** page, click the **Managed External Persons** tab.
3. On the **Scope of Managed External Persons** page, click **Connect to AD LDS Instance**.
4. If connections already exist, select a connection from the list. If you want to create a new connection, click **Add new connection**.
5. If you selected to create the new connection, in the **Connect to AD LDS Instance** dialog, configure the following options:
   - In the **Server name on which AD LDS instance is installed** text box, type the name of the server to which you want to connect.
   - In the **Port number (LDAP or SSL)** text box, enter the port number that you specified when installing the AD LDS instance. If you select the **Use SSL** check box, enter the SSL port number; otherwise, LDAP port number. It is recommended to use SSL in your production environment.
a. In the **Application directory partition** text box, enter the name of the application directory partition from the AD LDS instance to which you want to connect.

b. In the **Application directory partition alias** text box, type the alias for the application directory partition which will be used to address the partition on the Self-Service site.

c. In the **Access account** section, select **Password Manager Service account** to have Password Manager access the AD LDS instance using the Password Manager Service account, otherwise, select **The following Active Directory account** or **The following AD LDS account** radio button and enter the required user name and password.

For information on how to prepare the access account, see Configuring Permissions for Access Account on page 59.

6. Click **Save**.

**To specify groups or OUs included in the scope of managed external persons**

1. On the menu bar of the Administration site, click **Licensing**.

2. On the **Licenses** page, click the **Managed External Persons** tab.

3. On the **Scope of Managed External Persons** page, select the connection for which you want to specify groups or OUs and click **Edit**.

4. Do the following:
   - To specify the groups, click **Add** under **Groups included into the scope of managed external persons**.
   - To specify the OUs, click **Add** under **Organizational units included into the scope of managed external persons**.

5. Click **Save**.

**To specify groups or OUs excluded from the scope of managed external persons**

1. On the menu bar of the Administration site, click **Licensing**.

2. On the **Licenses** page, click the **Managed External Persons** tab.

3. On the **Scope of Managed External Persons** page, select the connection for which you want to specify groups or OUs and click **Edit**.

4. Do the following:
   - To specify the groups, click **Add** under **Groups excluded from the scope of managed external persons**.
   - To specify the OUs, click **Add** under **Organizational units excluded from the scope of managed external persons**.

5. Click **Save**.
Updating the License

If you have purchased a new license, you need to update the license by installing the new license key file. You can use the About section of the Administration site to install the file.

To update the license

1. On the menu bar of the Administration site, click Licensing.
2. On the Licenses page, click Install License.
3. Select the license key file.
4. Click Save.

Telephone Verification Feature License

Password Manager for AD LDS requires a separate license for telephone verification feature that allows users to authenticate themselves via one-time PINs received as text messages or through automated voice calls. For more information about this feature, see Phone-Based Authentication Service Overview on page 56.

You can install this license during Password Manager installation or provide the license file later on the Administration site. To install the license after Password Manager installation, see the above procedure “Updating the License”.

You must specify a separate scope of users for telephone verification service. Only users included in the scope will have access to the service.

License violation occurs in the following cases

- The actual number of users exceeds the maximum licensed number for the telephone verification service. In this case, users will not be able to authenticate via phone if you do not decrease the number of user accounts set in the scope or do not update the license.

- The license for the telephone verification service expired. In this case, you will have a grace period of 30 days during which the telephone verification service is available. Once the grace period has expired, users will not be able to authenticate via phone, but, other authentication mechanisms such as Q&A, are not affected by expiry/non-compliance of this Telephone Verification license.

Checklist: Installing Password Manager for AD LDS

This checklist provides tasks that an administrator should perform when installing Password Manager for AD LDS.
Table 2: Checklist for installing Password Manager for AD LDS

<table>
<thead>
<tr>
<th>Step</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before you install Password Manager for AD LDS, you should configure Password Manager Service account and application pool identity.</td>
<td>Configuring Password Manager Service Account and Application Pool Identity on page 10</td>
</tr>
<tr>
<td>It is strongly recommended that you enable HTTPS on the server where Password Manager for AD LDS is installed.</td>
<td>Enabling HTTPS on page 11</td>
</tr>
<tr>
<td>Install an instance of Password Manager for AD LDS.</td>
<td>Steps to Install Password Manager for AD LDS</td>
</tr>
<tr>
<td>Extend AD LDS schema</td>
<td>Extending AD LDS Schema on page 13</td>
</tr>
<tr>
<td>Initialize a Password Manager Instance</td>
<td>Instance Initialization on page 13</td>
</tr>
</tbody>
</table>

Installing Password Manager for ADLDS

This section describes how to install Password Manager for AD LDS. You will learn how to configure Password Manager Service account and application pool identity. A separate section will guide you through the steps required to install Password Manager for AD LDS. For more information see Typical Deployment Scenarios on page 39.

**IMPORTANT:** Password Manager for Active Directory (AD) and Password Manager for Active Directory Lightweight Directory Services (ADLDS) must not be installed on the same server.

Configuring Password Manager Service Account and Application Pool Identity

When installing Password Manager for AD LDS, you are prompted to specify two accounts: Password Manager Service account and application pool identity. Password Manager Service account is an account under which Password Manager Service runs.

You can also use the Password Manager Service account to connect to an AD LDS instance when configuring user and helpdesk scopes. To do this, ensure that Password Manager Service account has the required minimum permissions. For more information, see Configuring Permissions for Access Account on page 59.

Application pool identity is an account under which the application pool's worker process runs. The account you specify as the application pool identity will be used to run Password Manager for AD LDS Web sites.
For Password Manager for AD LDS to run successfully, the accounts you specify when installing Password Manager for AD LDS must meet the following requirements:

- Password Manager Service account must be a member of the Administrators group on the Web server where Password Manager for AD LDS is installed.
- Application pool identity account must be a member of the IIS_IUSRS local group on the Web server in IIS 7.0 and must have permissions to create files in the <Password Manager installation folder>\App_Data folder.
- Application pool identity account must have the full control permission set for the following registry keys: HKEY_LOCAL_MACHINE\SOFTWARE\One Identity\Password Manager for AD LDS.
- If the App pool account is a domain user with minimal permission, make sure that the <PM for ADLDS installation folder>\Web folder must be provided with full control permission set for Application pool identity account.

Before you install Password Manager for AD LDS, make sure that the Password Manager Service account and application pool identity have the rights listed above.

**Enabling HTTPS**

We strongly recommend that you use HTTPS with Password Manager for AD LDS. The secure hypertext transfer protocol (HTTPS) is a communications protocol designed to transfer encrypted information between computers over the World Wide Web.

For instructions on how to configure SSL in order to support HTTPS connections from client applications, see the article “Configuring Secure Sockets Layer in IIS 7” at http://technet.microsoft.com/en-us/library/cc771438%28WS.10%29.aspx.

**NOTE:** To enable the Password Manager installation to be redirected from HTTP to use HTTPS by default, the HSTS (web security policy mechanism) functionality must be enabled. To enable HSTS in Password Manager, in the "HKEY_LOCAL_MACHINE\SOFTWARE\One Identity\Password Manager" registry key, set the registry value of the "HSTSEnabled" string to "true".

**Steps to Install Password Manager for AD LDS**

**To install Password Manager**

1. Depending on the hardware, run [Password Manager for AD LDS x86](#) or [Password Manager for AD LDS x64](#) from the autorun window of the installation CD.
2. Read the license agreement, select I accept the terms in the license
agreement, and then click Next.

3. On the User Information page, specify the following options, and then click Next:

<table>
<thead>
<tr>
<th>Option</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full name</td>
<td>Type your name.</td>
</tr>
<tr>
<td>Organization</td>
<td>Type the name of your organization.</td>
</tr>
<tr>
<td>Licenses</td>
<td>Click this button, and then specify the path to the license file.</td>
</tr>
</tbody>
</table>

*A license file is a file with the .ASC extension that you have obtained from your One Identity representative.*

4. On the Custom Setup page, select the components to install, and then click Next.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Installation</td>
<td>Select this option to install Password Manager Service and the Administration, Self-Service and Helpdesk sites on this computer.</td>
</tr>
<tr>
<td>Legacy Self-Service Site</td>
<td>Select this option to install only the legacy Self-Service site.</td>
</tr>
<tr>
<td>Password Manager Self-Service Site</td>
<td>Select this option to install only the Password Manager Self-Service site.</td>
</tr>
<tr>
<td>Helpdesk Site</td>
<td>Select this option to install only the Helpdesk site.</td>
</tr>
</tbody>
</table>

You can install all Password Manager components together on a single server or you can deploy the Self-Service and Helpdesk sites on a standalone server. To learn more about installing the Self-Service and Helpdesk sites on a standalone server, see Installing Legacy Self-Service, Password Manager Self-Service, and Helpdesk Sites on a Standalone Server on page 15.

5. On the Password Manager Service Account Information page, specify the name and password for the Password Manager Service account, and then click Next. For more information on the requirements for the Password Manager Service account, see Configuring Password Manager Service Account and Application Pool Identity on page 10.

6. On the Specify Web Site and Application Pool Identity page, select the Web site name and specify the name and password for the account to be used as an application pool identity, and then click Next. For more information on the
requirements for the application pool identity, see Configuring Password Manager Service Account and Application Pool Identity on page 10.

7. Click **Install**.
8. When the installation is complete, click **Finish**.

**IMPORTANT:** By default, Password Manager for AD LDS uses built-in certificates to encrypt traffic between the Password Manager Web sites and Password Manager Service. After installing Password Manager for AD LDS, if the Web sites (Self-Service and Helpdesk) and the Password Manager Service are installed on different computers, it is recommended to replace these certificates. For more information, see Specifying Custom Certificates for Authentication and Traffic EncryptionBetween Password Manager Service and Web Sites on page 19.

### Extending AD LDS Schema

To use Password Manager for AD LDS with an AD LDS instance, you need to extend the AD LDS schema to include required object class definitions.

When installing a unique AD LDS instance, you must specify the LDAP and SSL port numbers and the application directory partition name. Make sure, you remember the values you enter because you will need to use them when extending the AD LDS schema.

**IMPORTANT:** When you install an AD LDS instance, in the AD LDS setup wizard select the option to create a new application directory partition and, on the Importing LDIF Files page, select all shown files.

**To extend AD LDS schema**

1. On a computer where an AD LDS instance is installed, create a temporary folder.
2. Copy all files from the Password Manager\Setup\ADLDS Extension folder on the Password Manager installation CD to the folder you created in step 1.
3. In the temporary folder, modify the **prepare_ad_lds.cmd** file using any text editor. Replace the port number in the line “SET PORT=50000” with the LDAP port number you specified in the AD LDS setup wizard.
4. In the temporary folder, modify the **data.ldf** file using any text editor. Replace all occurrences of the “O=Quest,C=US” with the application directory partition name you specified in the AD LDS setup wizard.
5. Run the **prepare_ad_lds.cmd** file.

### Instance Initialization

After you installed Password Manager for AD LDS on your computer, you need to initialize an instance before you begin to configure a new Management Policy, that is, before configuring the user and helpdesk scopes, Questions and Answers policy, and managing
workflows. When initializing a Password Manager instance, you can choose one of the two options: create a unique instance or a replica of an existing instance. When you create the replica of the existing instance, the new instance shares its entire configuration with the existing instance. Password Manager instances sharing the same configuration are referred to as a Password Manager realm. For more information about Password Manager realms, see Installing Multiple Instances of Password Manager for AD LDS.

**To initialize Password Manager instance**

1. Open the Administration site by entering the following address: http(s)://<ComputerName>/PMAdminADLDS, where <ComputerName> is the name of the computer on which Password Manager for AD LDS is installed. You can obtain the URL path to the Admin site from your system administrator. On the logon page, enter your user name and password and click **Log on**. The Instance Initialization page will be displayed automatically.

   **NOTE:** For Password Manager versions 5.8.x or later, users must be a part of the local PMAdminADLDS group and either of IIS_IUSRS or Administrators group to access the PMAdmin site.

2. On the Instance Initialization page, select one of the following options, depending on what type of instance you want to create:
   - **Unique instance** Creates a new instance.
   - **A replica of an existing instance** Joins a new instance to a Password Manager realm.

3. If you have selected the option **A replica of an existing instance**, follow the instructions provided later in the section “Installing Multiple Instances of Password Manager for AD LDS”.

4. If you have selected the option **Unique instance**, under **Service connection settings**, specify the following:
   - **Certificate name** Select the certificate that was issued for the computer running the Password Manager Service. If you decide to install the Legacy Self-service, Self-Service and Helpdesk sites separately from the Password Manager Service, it is recommended to replace the built-in certificate that is used encrypt traffic between the Service and the sites. For more information, see Specifying Custom Certificates for Authentication and Traffic EncryptionBetween Password Manager Service and Web Sites.
   - **Port number** Specify the port that the Self-Service and Helpdesk sites will use to connect to the Password Manager Service. By default, port 8085 is used.

5. Under **Advanced settings**, specifying the following:
   - **Encryption algorithm** Specify the encryption algorithm that will be used to encrypt users’ answers to secret questions and other security sensitive information. You can select from two options: Triple DES and AES. By default, Password Manager for AD LDS uses Triple DES algorithm to encrypt data. Note, that users’ answers will be encrypted if the “Store answers using reversible encryption” option is selected in the Q&A Profile settings. Otherwise, the answers will be hashed.
• **Encryption key length** Specify whether a 192-bit or 256-bit encryption key will be used.

• **Hashing algorithm** Specify the hashing algorithm that will be used to hash users’ answers to secret questions. The following algorithms are available: MD5 and SHA-256. By default, Password Manager for AD LDS uses SHA-256 hashing algorithm. Password Manager will hash users’ answers if “Store answers using reversible encryption” option is not selected in the Q&A Profile settings.

• **Attribute name** Enter the attribute of user’s account in AD LDS in which user’s Questions and Answers profile will be stored. By default, Password Manager stores Q&A profile data in the comment attribute of each user’s account and configuration data in the comment attribute of a configuration storage account, which is automatically created when installing Password Manager for AD LDS.

6. Click **Save** to complete instance initialization.

## Installing Legacy Self-Service, Password Manager Self-Service, and Helpdesk Sites on a Standalone Server

Password Manager for AD LDS allows you to install the Legacy Self-Service, Password Manager Self-Service, and Helpdesk sites on a standalone server. For example, you can use this installation scenario to deploy Password Manager for AD LDS in a perimeter network (DMZ). For more information see **Typical Deployment Scenarios** on page 39 and **Password Manager for AD LDS in Perimeter Network** on page 43.

When deploying Password Manager for AD LDS in a perimeter network, it is recommended to install the Password Manager Service and the sites in a corporate network at first (i.e. use the Full installation option in the Password Manager for AD LDS setup), and then install only the Self-Service site in the perimeter network.

When you use this installation scenario, only one port should be open in the firewall between the corporate network and the perimeter network (by default, port number 8085 is used).

**To install Legacy Self-Service site, Password Manager Self-Service site, and Helpdesk sites on a standalone server**

1. Depending on the hardware, run **Password Manager for AD LDS x64** from the autorun window of the installation CD.

2. Read the license agreement, select **I accept the terms in the license agreement**, and then click **Next**.

3. On the **User Information** page, specify the following options, and then click **Next**:
Table 5: User and license information

<table>
<thead>
<tr>
<th>Option</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full name</td>
<td>Type your name</td>
</tr>
<tr>
<td>Organization</td>
<td>Type the name of your organization</td>
</tr>
<tr>
<td>Licenses</td>
<td>Click this button, and then specify the path to the license file.</td>
</tr>
</tbody>
</table>

A license file is a file with the .ASC extension that you have obtained from your One Identity representative.

4. On the Custom Setup page, select the Legacy Self-Service Site, Password Manager Self-Service Site, and/or Helpdesk Site features, and then click Next.

5. On the Specify Web Site and Application Pool Identity page, select the Web site name and specify the name and password for the account to be used as application pool identity, and then click Next. For more information on the requirements for the application pool identity, see Configuring Password Manager Service Account and Application Pool Identity.

6. Click Install.

7. When installation is complete, click Finish.

After you installed the Self-Service and Helpdesk sites on a standalone server, you need to initialize the sites to start using them.

To initialize the Legacy Self-Service site or the Password Manager Self-Service

1. Open the Self-Service site by entering the following address: http(s)://<ComputerName>/PMUserADLDS, where <ComputerName> is the name of the computer on which Self-Service site is installed. The Self-Service Site Initialization page will be displayed automatically.

   **NOTE:** For the Password Manager Self-Service site, enter the following address: http(s)://<ComputerName>/PMSelfServiceADLDS.

1. In the Computer name or IP address text box, specify the Password Manager Service host name or IP address.

2. In the Port number text box, specify the port number that the Self-Service site will use to connect to the Password Manager Service.

3. From the Certificate name drop-down list, select the name of the certificate to be used by this site. By default, Password Manager for AD LDS uses a built-in certificate issued by One Identity. You can specify a custom certificate for authentication and traffic encryption between the Password Manager Service and the Web sites (Self-Service and Helpdesk). For more information on using custom certificates, see Specifying Custom Certificates for Authentication and Traffic Encryption Between Password Manager Service and Web Sites on page 19.
IMPORTANT: Before selecting a custom certificate on the Self-Service site, specify a custom certificate on the Administration site.

4. Click **Save**.

**To initialize the Helpdesk site**

1. Open the Helpdesk site by entering the following address: http(s)://<ComputerName>/PMHelpdeskADLDS, where <ComputerName> is the name of the computer on which Helpdesk site is installed. The **Helpdesk Site Initialization** page will be displayed automatically.

2. In the **Computer name or IP address** text box, specify the Password Manager Service host name or IP address.

3. In the **Port number** text box, specify the port number that the Helpdesk site will use to connect to the Password Manager Service.

4. From the **Certificate name** drop-down list, select the name of the certificate to be used by this site. By default, Password Manager for AD LDS uses a built-in certificate issued by One Identity. You can specify a custom certificate for authentication and traffic encryption between the Password Manager Service and the Web sites (Self-Service and Helpdesk). For more information on using custom certificates, see **Specifying Custom Certificates for Authentication and Traffic Encryption Between Password Manager Service and Web Sites** on page 19.

   **IMPORTANT:** Before selecting a custom certificate on the Helpdesk site, specify a custom certificate on the Administration site.

5. Click **Save**.

**Installing Multiple Instances of Password Manager for AD LDS**

Several Password Manager instances sharing common configuration are referred to as a realm. A realm is a group of Password Manager Service instances sharing all settings and having the same set of Management Policies, that is, the same user and helpdesk scopes, Q&A policy, and workflow settings. Password Manager realms provide for enhanced availability and fault tolerance. For more information see **Typical Deployment Scenarios** on page 39.

**CAUTION:** It is not recommended to edit Password Manager settings simultaneously on multiple instances belonging to one realm. Simultaneous modification of settings on multiple Password Manager instances may cause data loss.
**To create a Password Manager Realm**

1. Export a configuration file from the instance belonging to the target realm.
   - To export instance settings to the configuration file, connect to the Administration site of the instance belonging to the target realm.
   - On the menu bar, click **General Settings**, then click **Import/Export**.
   - On the **Import/Export Configuration Settings** page, select the **Export configuration settings** option and enter the password to protect the configuration file. Click **Export** to save the configuration file.
   
   IMPORTANT: Remember the password that you provide for the configuration file. You should enter this password when importing the configuration file for a new instance you want to join to the target realm.

2. Install a new Password Manager instance by running **Password Manager for AD LDS x86** or **Password Manager for AD LDS x64** from the autorun window of the installation CD. For more information on the installation procedure, see **Installing Multiple Instances of Password Manager for AD LDS**.

3. Open the Administration site by entering the following address: http(s)://<ComputerName>/PMAdminADLDS, where <ComputerName> is the name of the computer on which Password Manager for AD LDS is installed. On the **Instance Initialization** page, select the **A Replica of an existing instance** option.

4. Click **Upload** to select the configuration file that you exported from the instance belonging to the target realm.

5. Enter the password to the configuration file and click **Save**.

**FailSafe support in Password Manager**

This feature allows a user to login to Helpdesk or Self-Service site when Password Manager Service is unavailable.

Helpdesk and Self-Service site use Password Manager Service to communicate with Active Directory. If Password Manager Service is unavailable, authentication and other such services do not function. For such scenario, Password Manager has a FailSafe feature integrated to connect to other available Password Manager service automatically.

After the initialization of Helpdesk and Self-Service site, **WcfServiceRealms.xml** file is created. This file has records of all the instances of Password Manager Services installed. The user can use one of the realm instances listed in **WcfServiceRealms.xml** file, in case of unavailability of services in the primary instance of Password Manager Service.

For example, helpdesk site is connected to **PM service 1**. If the **PM service 1** is non-functional, with the integrated FailSafe feature, the helpdesk site automatically connects to **PM service 2** to continue with the tasks uninterrupted. After the **PM service 1** is restored, the helpdesk site is connected back to the initially connected PM service, that is **PM service 1**.
NOTE: Failsafe works in distributed environment. If all the Password Manager components are installed on the same server, the FailSafe operation might not work as expected.

NOTE: The Self-Service and Helpdesk Site's URLs must be accessible from Password Manager Service.

Specifying Custom Certificates for Authentication and Traffic Encryption Between Password Manager Service and Web Sites

When the Password Manager Service is installed on one computer and the Self-Service and Helpdesk sites are installed on some other computers, certificate-based authentication and traffic encryption is used to protect traffic between these components.

By default, Password Manager for AD LDS uses built-in certificates issued by One Identity. However, you may want to install and use custom certificates issued by a trusted Windows-based certification authority.

This section provides instructions on how to start using custom certificates for authentication and traffic encryption between Password Manager components.

Complete the following steps:

1. Obtain and install custom certificates from a trusted Windows-based certification authority.
2. Provide certificate issued for a server computer to the Password Manager Service.
3. Provide certificate issued for client computers to the Self-Service and Helpdesk sites.

Step 1: Obtain and Install Custom Certificates From a Trusted Windows-Based Certification Authority

You must obtain two certificates from a trusted Windows-based certification authority: one for the computer running the Password Manager Service (server computer) and another for computers running the Self-Service or Helpdesk site (client computers).

When obtaining certificates, make sure that:
The server computer can be accessed from the client computers by using the server certificate CN.

**Both** is selected as a key usage in a certificate request.

**Enable strong private key protection** option is NOT selected in a certificate request.

The following is a sample procedure describing how to obtain a certificate through the Windows 2012 Certificate Services Web interface.

**To request a certificate using Windows 2012 Certificate Services Web Interface**

1. Use Internet Explorer to open https://servername/certsrv, where **servername** refers to the name of the Web server running Windows Server 2012 where the certification authority that you want to access is located.

2. On the **Welcome** page, click **Request a certificate**.

3. On the **Request a Certificate** page, click **advanced certificate request**.

4. On the **Advanced Certificate Request** page, click **Create and submit a certificate request to this CA**.

5. Provide identification information as required. In the **Name** text box, enter the name of the server for which you are requesting a certificate.

6. In **Type of Certificate Needed**, select **Server Authentication Certificate**.

7. In **Key Options**, select **Create new key set**, and specify the following options:
   - In **CSP** (Cryptographic service provider), select **Microsoft Enhanced RSA and AES Cryptographic Provider**.
   - In **Key Usage**, click **Both**.
   - In **Key Size**, set **1024** or more.
   - Select **Automatic key container name**.
   - Select the **Mark keys as exportable** check box.
   - Clear the **Enable strong private key protection** check box.

8. In **Additional Options**, specify the following:
   - In **Request Format**, select **CMC**.
   - In **Hash Algorithm**, select **sha256**.
   - Do not select the **Save request** check box.
   - Specify attributes if necessary and a friendly name for your request.
9. Click **Submit**.

10. If you see the Certificate Issued Web page, click **Install this certificate**. If your request needs to be approved by your administrator first, wait for the approval and then go to the https://servername/certsrv, click **View the status of a pending certificate request**, and then install the issued certificate.

## Step 2: Provide Certificate Issued for Server Computer to Password Manager Service

In this step, you provide the certificate issued for the server computer to the Password Manager Service by using the Administration site.

**To provide the certificate to the Password Manager Service**

1. Open the Administration site by entering the following address: http(s)://<ComputerName>/PMAdminADLDS, where <ComputerName> is the name of the computer on which Password Manager is installed.

2. Click **General Settings|Instance Reinitialization**. Under the **Service connection settings**, select the custom certificate issued for the server computer from the **Certificate name** drop-down list.

3. Click **Save**.

## Step 3: Provide Certificate Issued for Client Computers to Legacy Self-Service, Password Manager Self-Service, and Helpdesk Sites

In this step, you provide the certificate issued for the client computers to the Self-Service and Helpdesk sites installed separately from the Password Manager Service.

**To provide the certificate to the Legacy Self-Service Site and Password Manager Self-Service site**

1. Open the Self-Service site by entering the following address: http(s)://<ComputerName>/PMUserADLDS, where <ComputerName> is the name of the computer on which Self-Service site is installed. The **Self-Service Site Initialization** page will be displayed automatically if the Self-Service site is opened for the first time.
2. From the **Certificate name** drop-down list, select the custom certificate issued for the client computer.

3. Click **Save**.

**To provide the certificate to the Helpdesk Site**

1. Open the Helpdesk site by entering the following address: http(s)://<ComputerName>/PMHelpdeskADLDS, where <ComputerName> is the name of the computer on which Helpdesk site is installed. The **Helpdesk Site Initialization** page will be displayed automatically if the Helpdesk site is opened for the first time.

2. From the **Certificate name** drop-down list, select the custom certificate issued for the client computer.

3. Click **Save**.
Upgrading Password Manager

This section briefs about the process to upgrade Password Manager to the latest version (5.9.6).
NOTE:

- It is recommended to back up the current configuration by exporting the settings from 5.7.1 or later versions. For more information, see To export configuration settings from Password Manager for AD LDS 5.7.1 or later versions to 5.9.6 on page 25.

- Running the Migration Wizard is not required while upgrading from Password Manager 5.7.1 or later versions to 5.9.6.

- If you want to upgrade to 5.9.6, it is recommended to reinstall the license file from the Administration site once the upgrade is complete. Before installing the license, delete the existing SoftLicense binary value from [HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Quest Software] registry key.

- Any workflows that are customized in the previous versions of Password Manager should be manually merged with the workflow of the latest version of the Password Manager to avoid any end user data corruption.

  For example, changes made to the Register workflow (Self-Service workflows) such as addition/update of any authentication steps to the default configuration, should be manually recreated after upgrade to PM 5.9.6.

- Replication must be enabled for the successful installation of Password Manager 5.9.6.

  To update storage files with new encryption mechanism, all realm instances must be updated with the Password Manager 5.9.6 configuration and must have the same encryption key.

  To perform the same, login to PMAdmin site from the primary server, Navigate to General Settings > Import/Export > Export. Copy and Save the password securely. Import this configuration data in all the PM secondary replication instances by selecting the exported configuration data and providing the password.

  If the secondary instances are not updated with new configuration, a notification will be displayed in Administration site as 'Import configuration settings from primary instance".

  In the replication instances, Navigate to General Settings > Import/Export > Import, select the exported data from the primary server and input the password saved.

- Shared.storage file will be encrypted and copied to Active Directory only when all replication instances are updated with Password Manager 5.9.6 configuration and encryption key.

- When all the realm instances are updated with Password Manager 5.9.6, Q&A profiles of users will be updated with new encryption key when one of the following is performed:
  - User updates Q&A profile
  - Run Migration wizard to update all the user profiles automatically

This section consists of the following topics:
In-place upgrade from 5.8.2 or later versions to 5.9.6

Manual upgrade from 5.7.1 or later versions

To export configuration settings from Password Manager for AD LDS 5.7.1 or later versions to 5.9.6

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

   NOTE: When prompted to log in, provide your domain user name in a domain-name\username format.

2. On the left pane, click General > Settings, and click the Import/Export tab and select the Export configuration settings option, and then click Export.

After you have exported configuration settings from Password Manager 5.9.6 or later versions, you can uninstall it.

To uninstall Password Manager for AD LDS 5.7.1 or later versions

1. Click Start, click Run, type appwiz.cpl, and then press ENTER.

2. Select One Identity Password Manager for AD LDS x86/x64 in the list, and then click Uninstall.

After you uninstall Password Manager 5.7.1 or later versions, install Password Manager 5.9.6 on the same computer. All configuration settings will be automatically detected by the new version.

In-place upgrade from 5.8.2 or later versions to 5.9.6

1. From the autorun window of the installation CD, click Install against Password Manager x64 option. Read the content and click Next.

2. Read the content in the Risk of data loss! window and select I acknowledge the above instructions check box, and then click Next.

3. In the Configuration Backup page, provide the File Location where the configuration details have to be backed up, and set a new password, and then click Next.

   NOTE: Do not forget to store the password securely as it is required to import the configuration post upgrade. The backup of the configuration data is now saved in the provided file location.
4. In the Password Manager Service Account Information page, the previously chosen account name appears by default. Enter the password, and then click Next.

   **NOTE:** To change the account name, click Browse... and select the appropriate Password Manager service account name.

5. In the Specify Web Site and Application Pool Identity page, choose the website name, and in the Application pool identity section, the previously chosen account name appears by default. Enter the password, and then click Next.

   **NOTE:** To change the account name, click Browse... and select the appropriate Application Pool Identity account name.

6. After completing the above process, click Install.

Upon successful installation, the Password Manager installs the following sites:

- Administration Site
- Helpdesk Site
- Password Manager Self-Service Site
- Legacy Self Service Site

   **NOTE:** The above mentioned upgrade steps are not applicable for 5.7.1 or other lower versions.

### Manual upgrade from 5.7.1 or later versions

Uninstall Password Manager 5.7.1 or later versions, and then install Password Manager 5.9.6 on the computer where Password Manager 5.7.1 or later versions was installed. For more information, see To uninstall Password Manager for AD LDS 5.7.1 or later versions section.

1. From the autorun window of the installation CD, click Install against Password Manager x64 option. Read the content and click Next.
2. Select I accept the terms in License Agreement check box, and then click Next.
3. In the User Information page, enter the user details such as the username and the organization to which the user belongs to, and then click Next.
   a. To verify licenses information, click Licenses... and then check the statuses of the license.

   **NOTE:** If the license has expired, click Browse license... and select the appropriate license to continue the Password Manager service.
4. In the **Custom Setup** page, click the respective option that needs to be installed, and then click **Next**.

5. In the **Password Manager Service Account Information** page, the account name appears by default. Enter the password, and then click **Next**.

   **NOTE:** To change the account name, click **Browse**... and select the appropriate Password Manager service account name.

6. In the **Specify Web Site and Application Pool Identity** page, choose the website name, and in the Application pool identity section, the account name appears by default. Enter the password, and then click Next.

   **NOTE:** To change the account name, click **Browse**... and select the appropriate Application Pool Identity account name.

7. After completing the above process, click **Install**.

Upon successful installation, the Password Manager installs the following sites:

- Administration Site
- Helpdesk Site
- Password Manager Self-Service Site

**NOTE:**

- Make sure that you have taken a back up of the current configuration settings. For more information, see To export configuration settings from Password Manager for AD LDS 5.7.1 or later versions to 5.9.6 on page 25.
- After you uninstall Password Manager 5.7.1 or later versions, all configuration settings will be automatically detected by the new version. For more information on how to install Password Manager, see Installing Password Manager.
- If you have multiple Password Manager instances installed, when upgrading them, you may experience the following issue: the Realm Instances page of the Administration site displays an incorrect list of installed instances. After you upgrade all instances, the page will display the correct list.
IMPORTANT:

- **Switch to the Password Manager Self-Service site** option is displayed only in case of in place upgrade.

- In case of Manual upgrade to 5.9.6, the Self-Service site gets replaced as Password Manager Self-Service site. Hence, post Manual upgrade, you can see only one Self service site (Password Manager Self-Service Site) and legacy self-service site is no more accessible, by default.

- In case of Manual upgrade, if the Legacy Self-Service site is required, Admin has to install it exclusively, in addition to the existing Password Manager Self Service site. In this case, point to note is that the Enabling Self-Service UI 5.9.6 (**Switch to Self-service site (5.9.5 onwards)**) option will not be applicable.
Password Manager Architecture

Password Manager Components and Third-Party Solutions
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Password Manager Components and Third-Party Solutions

This section provides information Password Manager components and third-party applications that can be used by Password Manager for AD LDS.

The following is a list of Password Manager components:

- Password Manager Service and the Administration site
- The Self-Service site
- The Helpdesk site

The following is a list of third-party applications that can be used by Password Manager for AD LDS:

- TeleSign
- SQL Server Database and SQL Server Reporting Services
- Quick Connect Sync Engine
- Defender
- Starling Two-Factor Authentication
- RADIUS Two-Factor Authentication
Password Manager = Password Manager Service + Administration site + Self-Service site + Helpdesk site
Password Manager Service and Administration Site

Password Manager Service and the Administration site are a core component of Password Manager for AD LDS.

Password Manager Service is a Windows service that provides core functionality and runs under the Password Manager Service account, which is specified during Password Manager for AD LDS installation.

The Administration site provides all the necessary settings for an administrator to configure and use Password Manager for AD LDS. Using the Administration site, the administrator can configure user and helpdesk scopes, Management Policies, password policy rules, etc.

Note, that the Administration site cannot be installed separately from Password Manager Service.

When installing the Administration site and Password Manager Service, the Self-Service and Helpdesk sites are also installed.

Legacy Self-Service Site

The Legacy Self-Service site provides users with the ability to easily and securely manage their passwords, thus eliminating the need for assistance from high-level administrators and reducing helpdesk workload.

The Legacy Self-Service site can be installed on the same server as the Administration Site and Password Manager Service, or on a stand-alone server, for example, if you want to install the Legacy Self-Service site in a perimeter network (DMZ).

Password Manager Self-Service site

The Password Manager Self-Service site provides functionality similar to the Legacy Self-Service site. The Password Manager Self-Service site includes enhancements to the user interface to improve the usability of the site.

Limitations & restrictions of the Password Manager Self-Service site

- The Password Manager Self-Service site can co-exist along with the Legacy Self-Service site.
- It is possible to revert to the Legacy Self-Service site at any time
- The Password Manager Self-Service site is available only in English.

Alternative option
As an alternative to using the Password Manager Self-Service site, use the Legacy Self-Service site.

Helpdesk Site

The Helpdesk site handles typical tasks performed by helpdesk operators, such as resetting passwords, unlocking user accounts, assigning temporary passcodes, and managing users' Questions and Answers profiles.

The Helpdesk site can be installed either on the same server as the as the Administration Site and Password Manager Service, or on a stand-alone server.

TeleSign

TeleSign is a service that provides phone-based authentication for Password Manager users. To enable the TeleSign service, it must be covered by your license and the administrator must configure the Authenticate via Phone activity and include the activity in corresponding workflows. If TeleSign is enabled, when performing a task on the Self-Service or Helpdesk site, users will prompted to select their phone number to which a one-time code will be sent by TeleSign and then enter the code on the site for verification.

TeleSign service is available anywhere where users can receive calls or text messages. To receive verification codes, users do not need to install any applications on their phones.

To communicate with TeleSign Password Manager for AD LDS uses REST API.

For more information, see Phone-Based Authentication Service Overview on page 56.

SQL Server Database and SQL Server Reporting Services

Using an SQL database and SQL Server Reporting Services you can manage reports that allow you to analyze how the application is used.

The available out-of-the-box reports help you track user registration activity, helpdesk tasks, user statuses, etc.

For more information, see Reporting and User Action History Overview on page 185.

Quick Connect Sync Engine

Quick Connect Sync Engine is a Password Manager for AD LDS product that provides unified identity and access management. Integrating Password Manager for AD LDS with Quick
Connect Sync Engine allows you to enable users and helpdesk operators to manage their passwords across different connected data sources.

To use Quick Connect Sync Engine, configure the **Change password in AD LDS and connected systems** or **Reset password in AD LDS and connected systems activities**.

To communicate with Quick Connect Sync Engine, Password Manager for AD LDS uses TCP (Transmission Control Protocol).

Change or Reset password in Active Directory and connected systems is not supported in ADLDS.

For more information, see Using this activity, you can configure Password Manager for AD LDS to use One Identity Quick Connect to reset passwords in connected systems. If used in conjunction with Quick Connect, Password Manager for AD LDS allows you to enable users and helpdesk operators to manage passwords across a wide variety of connected systems. To be able to integrate Password Manager for AD LDS with Quick Connect, you must have a working knowledge of Quick Connect Sync Engine.

**Defender**

**IMPORTANT:**
- Authenticating with Defender is an activity not supported with the current release of Password Manager ADLDS.

Defender is a One Identity product that provides two-factor authentication. Defender uses one-time passwords (OTP) generated by special hardware or software tokens. If Password Manager for AD LDS is integrated with Defender, users can use one-time passwords to authenticate themselves on the Self-Service site.

To use Defender with Password Manager for AD LDS, install the Defender Client SDK on the server on which Password Manager Service is installed.

For more information, see Authenticate with Defender on page 94.

**Starling Two-Factor Authentication**

Starling Two-Factor Authentication is a SaaS application that enables two-factor authentication on Password Manager. Starling Two-Factor Authentication uses the token response (OTP) received through SMS, phone call or Starling 2FA app for authentication. It also supports push notifications for authentication. To use push notification, you must install Starling 2FA app on your device and register your phone number while installing the app. In this option, you can authenticate by accepting the notification received on Starling 2FA app.

For more information regarding Starling Two-Factor Authentication, see Authenticate with Starling Two-Factor Authentication on page 95.
To configure Starling Two-Factor Authentication in Password Manager, you have to subscribe to Starling Two-Factor Authentication. For more details, visit One Identity Starling site.

RADIUS Two-Factor Authentication

RADIUS Two-Factor Authentication enables two-factor authentication on Password Manager. RADIUS Two-Factor Authentication uses one-time passwords to authenticate users on the Self-Service site and Helpdesk site.

To configure RADIUS Two-Factor Authentication in Password Manager, you have to configure the RADIUS server details in Password Manager.

To configure RADIUS Two-Factor Authentication for authentication

1. On the home page of the Administration site, click General Settings, and click the RADIUS Two-Factor tab.
2. In the RADIUS Server (IP address): text box, enter the RADIUS server IP address.
3. In the Port number text box, enter the port number assigned during configuration of RADIUS.
4. In the RADIUS Shared Secret text box, enter the password set during RADIUS configuration.
5. Select the check box, if Radius server requires two-step authentication like Azure MFA.

   **NOTE:** The Administrator can choose which user’s active directory attributes to be used for authentication from the Specify user’s AD attribute to authenticate the user dropdown box. The administrator can also specify additional active directory attributes to use for authentication apart from the list.

6. From the Additional RADIUS Attribute section, select the required RADIUS attribute from the drop-down menu. Specify the value for the selected attribute and click +. The RADIUS attributes and the corresponding values that you add is displayed. Click - to remove the RADIUS attribute you added.

   **NOTE:** The RADIUS attributes supported are NAS-IP-Address, NAS-Port, NAS-Port-Type, and NAS-Identifier.

7. Click Save.

For more information, see Authenticate with RADIUS Two-Factor Authentication on page 95.
Redistributable Secret Management Service

Redistributable Secret Management Service (rSMS) can be used to manage user passwords across multiple connected systems. Using the rSMS service it is possible to quickly synchronize the passwords across connected systems. By default, the rSMS service is installed with the Password Manager software.

**Alternative option**

The Redistributable Secret Management Service (rSMS) feature, can be used as an alternative to Quick Connect Sync Engine.

| NOTE: | Target platform IP address or the Hostname should not be same server where One Identity rSMS service is installed. |

**Location sensitive authentication**

The location sensitive authentication feature allow you to skip certain authentication methods for users trying to execute a workflow on Self-Service site from a defined corporate network. Using this feature, you can also restrict the capability of searching for the users on Self-Service Site from IP addresses that is not specified in the defined corporate IP address range.

| IMPORTANT: | It is mandatory to have at least one authentication method for users accessing the application from the defined corporate network. |

You can use the location sensitive authentication feature for any of the following authentication types:

- Q&A profile (random questions)
- Q&A profile (specific questions)
- Defender
- Starling Two-Factor Authentication
- RADIUS Two-Factor Authentication
- Phone

**Configuring corporate IP address range**

You must specify a defined corporate IP address range that help in determining if the users are trying to execute the workflow from an internal or external network.

1. On the home page of the Administration site, click **General Settings | Corporate IP Address Ranges**.
2. On the **Corporate IP Address Ranges** page, click **Add Corporate IP Address Range**.
3. Provide the **Network Address** and **Subnet Mask**.
4. Click **Save**.
   
The corporate IP address range is successfully added.

To edit the defined corporate IP address, click **Edit**. Click **Remove** to delete the defined corporate IP address.

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**Working with Power BI**

Microsoft Power BI is an analytics service that is used to visualize large data with business intelligence. You can generate multiples interactive reports and customize dashboards with data insights and plot them on graphs to simplify data visualization.

**IMPORTANT:** The existing reporting in Password Manager is retained for the current release, after which it will be deprecated and replaced by Power BI reporting service.

The predefined Password Manager PowerBI template is available in Password Manager\Setup\Template\PowerBI Template of the installation CD. You can extend the functionality by exporting the predefined template using the PowerBI Desktop software. The template provides the following reports by default:

- User Status
- Actions by Users
- Actions by Number of Users
- Users actions by Month
- Email Notification by Type and User
- Helpdesk usage by Actions
- Helpdesk Usage by Operators
- Helpdesk Usage by Users
- Registration by Month

**To import the predefined PowerBI template**

1. Download and install the Power BI Desktop software from the Microsoft Download Center.
2. Provide the credentials to login to the Power BI Desktop software.
3. Navigate to **File | Import | Power BI template**.
4. Select the predefined Power BI template and click **Open**. The SQL Server database window is displayed.
5. The PowerBI Desktop initiates the process to connect to the database from which the template is created. Click **Cancel**.
6. The Refresh window is displayed. Click **Cancel**.
7. Navigate to the **Data Source settings** in the Power BI Desktop.
The **Data source settings** window is displayed.

8. Click **Change Source**.

9. Provide the SQL Server name in the **Server** field and the Database name in the **Database** field.

10. Click **OK**.

11. Click **Apply changes** in the warning message to apply the latest changes.

   The Power BI Desktop is connected the database and all the updates are displayed.

**Alternative option**

As an alternative to generating reports using predefined Power BI templates, you can use the **Reporting** feature. For more information, see [Reporting and User Action History Overview](#).

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**Password Manager Credential Checker**

The Password Manager Credential Checker is based on PowerShell scripts used to check if the user’s password is compromised. Credential Checker deals with actions related to change password, reset password, change password in ADLDS and connected systems, or reset password in ADLDS and connected systems. By default, the Credential Checker PowerShell script implements **VeriClouds CredVerify** functionality for leaked password with hash segment.

**IMPORTANT:** If you prefer to use other credential checker service, modify the Credential Checker PowerShell script appropriately.

**Configuring Password Manager credential checker**

1. After the Password Manager is installed, on the Password Manager Administrator portal, go to **General settings | Extensibility** and select **Turn the credential checker mode on or off** to enable the feature.

2. On the Password Manager installation path, open the `compromised_password_checker` script. It is available in the `<installation location>\One Identity\Password Manager\Service\Resources\CredentialChecker` location.

3. Edit the script to provide the Vericlouds credentials:
   
   ```
   $url=<valid URL>
   $api_key=<valid Key>
   $api_secret=<valid api secret>
   ```

4. Save the file.

   When you enter a new password on the Self-Service site using any of the workflows, such as, **Forgot Password** or **Manage My Passwords**, the Credential Checker validates the new password and check if it matches with the passwords listed in the **VeriClouds**. If the password matches, **Provided password is compromised, type another password. If you've ever used it anywhere before, change it!** is displayed.
This feature is not applicable if the user changes the password using **CTRL+ALT+ DELETE** on the Windows logon screen.

**Typical Deployment Scenarios**

This section describes typical deployment scenarios for Password Manager for AD LDS, including scenarios with installation of the Self-Service and Helpdesk sites on standalone servers, using realms, and others.

**Simple Deployment**

In this scenario, you install all main Password Manager components, i.e. the Password Manager Service, Administration, Self-Service and Helpdesk sites on a single server. This is the simplest deployment scenario, which can be used in small environments and for demonstration purposes.
Deployment of the Legacy Self-Service, Password Manager Self-Service Site, and Helpdesk Sites on Standalone Servers

In this scenario, you install the Self-Service and/or Helpdesk sites on a standalone server. Note, that the Administration site cannot be installed separately from the Password Manager Service.

You can use this scenario to deploy Password Manager for AD LDS in an environment with a perimeter network. Installation of the Self-Service site in the perimeter network enhances security of your environment while preventing access to your internal network.

When deploying Password Manager for AD LDS in an environment with the perimeter network, it is recommended to do a full installation of Password Manager in the internal corporate network, and then install the Self-Service site in the perimeter network.

When deploying Password Manager in an environment with the perimeter network, it is recommended to do a full installation of Password Manager in the internal corporate network, and then install the Self-Service site in the perimeter network.

When you use this installation scenario, only one port should be open in the firewall between the corporate network and the perimeter network (by default, port number 8081 for the Self-Service site).

Realm Deployment
In this scenario, you install several Password Manager Services on separate servers. If all the instances of Password Manager for AD LDS share the same configuration (Management Policies, general settings, password policies, encryption algorithm, encryption key length, hashing algorithm, attribute for storing configuration data, and realm affinity ID), they are referred to as a realm.

The realm provides for high availability of the service, load balancing and fault tolerance.
For Password Manager Service instances installed on separate servers you can use a load balancer to enhance service availability.

To create Password Manager realm you need to create replicas of an existing instance by exporting settings from this instance and importing the settings to a new instance.

For more information on how to create realms, see Import/Export Configuration Settings on page 136.

Multiple Realm Deployment

In this scenario, you deploy several Password Manager realms in your environment. You can use this scenario in complex environment, when several Password Manager configurations are required.

For example, a service provider can deploy two Password Manager realms, one realm to service company A, and the other - company B.

You can also use this scenario for a test deployment of Password Manager for AD LDS. In this case, the first realm is a production deployment of Password Manager, and the second realm can be used for testing purposes.
Password Manager for AD LDS in Perimeter Network

When deploying Password Manager for AD LDS in a perimeter network (also known as DMZ), it is recommended to install the Password Manager Service and the sites in a corporate network at first (i.e. use the Full installation option in the Password Manager for AD LDS setup), and then install only the Self-Service and Helpdesk sites in the perimeter network.

When you use this installation scenario, only one port should be open in the firewall between the corporate network and the perimeter network (by default, port number 8081 is used).

For more information on installing the Self-Service and Helpdesk site separately from the Password Manager Service, see Installing Legacy Self-Service, Password Manager Self-Service, and Helpdesk Sites on a Standalone Server on page 15.

Installing Password Manager for AD LDS in Perimeter Network with Reverse Proxy

A reverse proxy is a proxy server that is typically deployed in a perimeter network to enhance security of the corporate network. By providing a single point of access to the servers installed in the intranet, the reverse proxy server protects the intranet from an external attack.
If you have the reverse proxy deployed in the perimeter network in your environment, it is recommended to install the Password Manager Service and the Self-Service and Helpdesk sites in the intranet and configure the reverse proxy to redirect requests from external users to the correct intranet URLs of the Password Manager sites.

Management Policy Overview

A Management Policy is a core concept in Password Manager for AD LDS. Management Policies allow you to organize and group settings for dedicated users and helpdesk operators.

Management Policy Components

The following diagram illustrates the Management Policy components:
**User scope** defines user groups from specified AD LDS instances that can access the Self-Service site and use the corresponding workflows. To a single user scope you can add multiple AD LDS connections, you can also use the same connection in the user and helpdesk scopes.
**Helpdesk scope** defines groups of helpdesk operators from specified AD LDS instances that can access the Helpdesk site and manage users from the user scope using the helpdesk workflows. To a single helpdesk scope you can multiple AD LDS connections, you can also use the same connection in the user and helpdesk scopes.

**Self-Service and helpdesk workflows** define the tasks that are available to users and helpdesk operators on the Self-Service and Helpdesk sites. For example, Forgot My Password, Assign Passcode, Unlock Account, etc.

**Questions and Answers policy** comprises a list of secret questions (in the default and additional languages) that users must answer to authenticate themselves and Q&A profile settings that specify various settings for questions and answers such as a minimum length of an answer or a question, a number of required user-defined questions, etc.

**User enforcement rules** define how users should be enforced to register with Password Manager for AD LDS and reminded to change password. For each enforcement rule a corresponding scheduled task exists. For example, the **Invitation to Create/Update Profile** scheduled task corresponds to the **Invite Users to Create/Update Profiles** enforcement rule. By default, the enforcement rules are not configured. To start notifying users to create/update their Q&A profiles and change password, you need to configure the rules after Password Manager for AD LDS installation.

**Management Policy and Other Password Manager for AD LDS Settings**

The following diagram illustrates how several Management Policies interact with other Password Manager settings:
In a single Password Manager instance you can create multiple Management Policies. Different Management Policies may use the same AD LDS connections (specified in the user and helpdesk scopes). If a user is included in the user scopes of both Management Policies, the settings from the first Management Policy in which scope the user is found will be applied to the user.

Settings from each Management Policy use the same scheduled tasks and password policies.

The Invitation to Create/Update Profile, Reminder to Create/Update Profiles, Reminder to Change Password scheduled tasks allow notifying users from scopes of user enforcement rules configured in Management Policies. For more information, see Scheduled Tasks on page 140 and User Enforcement Rules on page 122.

To set password policies for users from user scopes of Management Policies, you need to configure password policies and include corresponding users to the password policy scope. For more information about password policies, see Creating a Password Policy on page 165.

### Password Policy Overview

Password Manager for AD LDS provides the opportunity to granularly apply and manage password policies.

The following diagram shows available password policies and their structure:

By default, AD LDS enforces the local or domain policy applied to the computer on which an AD LDS instance runs. You can also configure password policies. Note, that the password policy applied to the computer on which the AD LDS instance runs cannot be automatically displayed on the Self-Service site when users change or reset passwords. To display such policy, use the Custom rule available in password policies. In this rule, enter the settings of the password policy applied to the computer running the AD LDS instance. For more information, see Custom Rule on page 179.

To create and manage password policies, you need to add a connection to the AD LDS instance on the Password Policies tab of the Administration site. When adding the
connection, you specify the application directory partition to which password policies will be applied and the credentials that will be used to access the partition.

After you have added the connection, you can create password policies for this application directory partition. For each password policy, you can specify a name, a set of policy rules, and a scope.

Note, that password policy rules are applied and displayed on the Self-Service site when users change or reset passwords, only after you have added the connection and created policies for the corresponding application directory partition.

If a user is found in the scopes of several password policies, then the policy with the highest priority is applied to the user. Note, that priority can be changed for policies with the same scope.

reCAPTCHA Overview

This section provides an overview of the reCAPTCHA service, system requirements for using it and references.

How It Works

reCAPTCHA is a free CAPTCHA service provided by Google. You can use it to protect the Self-Service site from bots attempting to access restricted areas.

As reCAPTCHA uses images that optical character recognition software has been unable to read, it provides a secure protection for Web sites.
1. A user opens the Self-Service site.
2. The user’s browser sends the public key obtained during registration on the reCAPTCHA site to the Google reCAPTCHA API server and receives a reCAPTCHA image with a token to identify the image.
3. The user deciphers the image (distorted text) and submits a response in a Web page form. The response and the token are transferred to the Password Manager for AD LDS server.
4. The response, the token and the private key (obtained during registration on the reCAPTCHA site) are then transferred to the Google reCAPTCHA Verify server to be checked. After checking the response, the reCAPTCHA server sends a reply back to the Password Manager for AD LDS server.
5. If the response is correct, the user is granted access to further steps on the Password Manager site.

How to Use reCAPTCHA on Password Manager Sites

To display reCAPTCHA images on the Self-Service site, include the Display reCAPTCHA activity in required workflows. To require users to reply to a reCAPTCHA challenge before
authentication, place the Display reCAPTCHA activity before any authentication activity in a workflow designer.

For more information on using reCAPTCHA in workflows, see Display reCAPTCHA on page 91.

You can also use reCAPTCHA on the Find Your Account page of the Self-Service site and require users to reply to the reCAPTCHA challenge before searching for their accounts. For more information, see Configuring Security Options on page 134.

System Requirements for Using reCAPTCHA

To be able to use reCAPTCHA on the Password Manager sites, make sure the following requirements are met:

- The Self-Service site have access to the following address: http://www.google.com/recaptcha/api/verify
- Users computers have access to the Internet and to the www.google.com address.

References

Use the following resource for additional information on the reCAPTCHA service:

- http://www.google.com/recaptcha
- https://policies.google.com/privacy?hl=en
- https://policies.google.com/terms?hl=en
- https://developers.google.com/terms/

User Enrollment Process Overview

To enforce users to register with Password Manager for AD LDS you can use two enforcement rules: Invite users to create/update Q&A profiles and Remind users to create/update Q&A profiles.

To start the enrollment process, you need to enable and configure the Invite users to create/update Q&A profiles rule. This rule sends email notifications to the users specified in the rule’s scope, inviting them to create or update their Q&A profiles. When configuring email notifications for this rule, you can insert a hyperlink to the Self-Service site. To add the hyperlink, enter the required URL in the email notification body. For example, http://mydomain.com/user. Note, that you cannot specify the hyperlink text.

To configure the Invite users to create/update Q&A profiles enforcement rule, you need to specify the conditions under which users should be notified. For example, users are not registered with Password Manager, users’ answers are shorter than required or users
have specified the same answers for several questions. These conditions correspond to the Q&A profile settings that are part of the Q&A policy. For more information, see Configuring Q&A Profile Settings on page 76. For more information on configuring this enforcement rule, see Invite Users to Create/Update Profiles on page 122.

Note, that only one email notification is sent to each user. If you want to remind users that they should register with Password Manager or update their Q&A profiles and send multiple emails, enable and configure the Remind users to create/update Q&A profiles enforcement rule.

The Remind users to create/update Q&A profiles enforcement rule can notify users via email. When configuring this rule, you can specify several notification scenarios. For each scenario, you should set the time period since the invitation date.

For more information on configuring this enforcement rule, see Remind Users to Create/Update Profiles on page 125.

If you want to configure different notification scenarios for different user groups, you can create several Management Policies, and within each Management Policy configure the Remind users to create/update Q&A profiles enforcement rule appropriately for different user groups.

Questions and Answers Policy Overview

Questions and Answers policy consists of secret questions and Q&A profile settings. Secret questions are questions that users must answer to create their profiles and then use the profiles for authentication. You can create question lists in multiple languages. Each question list contains mandatory, optional, and helpdesk questions. When creating profiles, users must answer all mandatory and helpdesk questions, and a specified number of optional and user-defined questions. You can specify the required number of question in the Q&A profile settings.

When authenticating on the Self-Service site with Q&A profiles, users can use mandatory, optional and user-defined questions from their profiles. When a helpdesk operator authenticates users, the operator can use mandatory and helpdesk questions from users’ profiles.

Q&A profile settings are a collection of settings that define the number of user-defined and optional questions required for registration, minimum length of answers, encryption setting for storing answers, and others.

Q&A Policy and Authentication

When you configure the Q&A policy, you should remember that the settings you specify may affect the authentication process. The following authentication activities use the Q&A policy settings:
- Authenticate with Q&A profile (random questions) - This activity is used in self-service workflows. It relies on the number of secret questions you specify in the activity. If a user’s profile contains fewer questions, you can select whether to authenticate the user or not. For more information, see Authenticate with Q&A Profile (Random Questions) on page 93.

- Authenticate with Q&A profile (specific questions) - This activity is used in self-service workflows. It relies on the specific secret questions you specify in the activity. If the specified questions cannot be found in a user’s profile, the user will not be authenticated. For more information, see Authenticate with Q&A Profile (Specific Questions) on page 93.

- Authenticate with Q&A profile - This activity is used in helpdesk workflows. It relies on the specific secret questions you specify in the activity and on the Store answers using reversible encryption option that you specify in the Q&A profile settings. If the specified questions cannot be found in a user’s profile, the user will not be authenticated.

  This activity uses mandatory and helpdesk questions. Helpdesk questions are always stored using reversible encryption. Mandatory questions are hashed, unless you select the Store answers using reversible encryption option in the Q&A profile settings. Note, that if mandatory questions are hashed, you will not be able to use the activity option that specifies that helpdesk operators verify user identity by comparing the answers provided by users with the displayed answers (the Answers to the specified questions (user’s answer is shown) option). For more information, see Authenticate with Q&A Profile.

**Q&A Policy and User Enforcement**

The **Q&A profile settings** affects the **Invite users to create/update Q&A profiles** enforcement rule. This rule has conditions that state when users should be notified to create or update their profiles. These conditions correspond to the Q&A profile settings. For example, the **User’s answers are shorter than required** condition corresponds to the **Minimum length of answers** setting. So, when you change any of the Q&A profile settings, you can then select the corresponding condition in the rule and enforce users to create or update their profiles in accordance with the new settings. For more information, see Invite Users to Create/Update Profiles on page 122.

**Data Replication**

This section provides information on how Password Manager for AD LDS stores and replicates data.
Storing Data

There are two types of data stored by Password Manager for AD LDS: Password Manager configuration data and users’ Questions and Answers profiles. Password Manager configuration data contains all settings you configure in Password Manager. Users’ Questions and Answers profiles are stored apart from the configuration data.

Q&A profiles are stored in the attribute of a user account in AD LDS that you specify during instance initialization. By default, it is the comment attribute. You can also change it after initializing a Password Manager instance; for more information, see Instance Reinitialization on page 149.

Password Manager configuration data is stored in the C:\ProgramData\One Identity\Password Manager for AD LDS folder. This folder contains two files (Shared.storage and Local.storage) and the LocalizationStorage folder.

The Shared.storage file contains configuration data that is shared among all instances of a realm: Management Policies, general settings, AD LDS connections, custom activities and workflows, instance settings, etc.

The Local.storage file contains the instance-specific settings, such as the instance name and statistics about scheduled tasks.

The LocalizationStorage folder contains the user interface texts localized in several languages.

Replicating Data

If you install a realm (several Password Manager instances sharing the same configuration), changes in the configuration of one instance are automatically propagated to other instances. To propagate the data, Password Manager for AD LDS replicates the data from the shared.storage file and the LocalizationStorage folder to AD LDS.

Before being written to AD LDS, the data is split into several segments and archived.

To distribute the configuration data from one instance to another, Password Manager for AD LDS uses a scheduled task and the PMReplication container in a managed application directory partition to which the data is copied. The PMReplication container is an container that is automatically created in the Users container of the managed application directory partition. To this container, containers for each Password Manager realm are added. Names of these containers correspond to the realm affinity id. Each realm container has the containers for every instance belonging to this realm. Names of instance containers correspond to the instance ids.

In the instance container, several user accounts are created. The number of user accounts is one more than the number of data segments. For example, if there are twenty data segments, then the instance container has twenty one user accounts. Note, that the created user accounts are disabled.

The same attribute that you specify for storing users’ Q&A profiles is used to store the configuration data segments. The first user account stores the data replica id, all other accounts store the data segments.
Replication mechanism analyses all data segments from all instances, selects data with the latest changes and propagates it.

⚠️ **CAUTION:** It is not recommended to edit Password Manager settings simultaneously on multiple instances belonging to one realm. Simultaneous modification of settings on multiple Password Manager instances may cause data loss.

Note, that the access account must have the permission to create user accounts and containers in the Users container for configuration data to be replicated. For more information on configuring the access account, see Configuring Permissions for Access Account on page 59.

## Changing Replication Settings

By default, the data to be replicated is divided into segments by a segment size (100 KB). Data can also be divided into segments according to a specified segment number.

You can also change the name of the storage container (by default, PMReplication) and the location for storing this container (by default, the Users container of a managed application directory partition), and the names of user accounts used to store data segments.

You can change replication settings by modifying the QPM.Service.Host.exe.config file located in the `<Password Manager installation folder>\Service folder`.

⚠️ **CAUTION:** Editing the configuration file may cause serious problems. It is recommended to back up the file before modifying it. Edit the QPM.Service.Host.exe.config file at your own risk.

### To change replication settings

1. On the computer where Password Manager for AD LDS is installed, open the QPM.Service.Host.exe.config file located in the `<Password Manager installation folder>\Service folder` with a text editor.

2. In the `replication` node, specify the following:

   - To divide the configuration data into segments by a segment size, set the `packetLimitMode` to `LimitSize` (packetLimitMode="LimitSize").
   - To divide the configuration data into segments by a number of segments, set the `packetLimitMode` to `LimitCount` (packetLimitMode="LimitCount").
   - If you set the `packetLimitMode` to `LimitSize`, specify the maximum segment size in bytes in the `maxPacketSize` parameter. For example, `maxPacketSize="100000"`. Set the `maxPacketsCount` parameter to zero (maxPacketsCount="0").
   - If you set the `packetLimitMode` to `LimitCount`, specify the maximum number of segments to be created in the `maxPacketsCount` parameter. For example, `maxPacketCount="10"`. Note, that this value must be greater than 1. Set the `maxPacketSize` parameter to zero (maxPacketSize="0").
3. In the **storageManager** node, specify the following:
   - To change the name of the storage container, in the `storageContainerReplicationPath` element specify the required name. The default value is `CN=PMReplication`.
   - To change the container for storing replication data, in the `storageContainerPath` element specify the required container. The default value is `CN=Users`.
   - To change the names of user accounts used to store data segments, in the `storageContainerPartName` element specify the required name. The default value is `strg`.


5. Restart the Password Manager Service in the **Services** console. Type `services.msc` at a command prompt, select **Password Manager for AD LDS Service** in the console, and click **Restart**.

6. Repeat steps 1-4 on each instance belonging to a Password Manager realm.

**Phone-Based Authentication Service Overview**

One of the authentication options offered by Password Manager for AD LDS is a phone-based authentication. It enables you to require users to enter a verification code on the Self-Service or Helpdesk site. The verification code can be sent as an SMS or automated call. The phone-based authentication service is provided by TeleSign.
How It Works

When starting a workflow containing phone-based authentication, Password Manager for AD LDS checks whether the phone-based authentication service is enabled in the provided license. The workflow is executed only if this service is enabled in the license.

1. On the Self-Service or Helpdesk site, a user selects their preferred phone number and verification method (SMS or automated call). This data is sent to Password Manager Service. Password Manager Service gets the phone numbers from the AD LDS attributes specified in the workflow settings.

2. Password Manager Service generates a verification code and transfers the code, selected phone number and verification method to TeleSign Service. HTTPS is used to send the data. The generated verification code is stored until the workflow is ended. Only one code is stored at a time.

3. TeleSign Service sends an automated call or SMS to the user’s mobile phone with the verification code. The language of the automated call depends on the user interface language of the Self-Service or Helpdesk site.

4. The user enters the verification code on the Self-Service site, then the code is sent to Password Manager Service.

5. Password Manager Service checks the verification code, if it is correct, the user is granted access to further steps on the Self-Service site.
How to Use Phone-Based Authentication

To use phone-based authentication on the Self-Service and Helpdesk sites, add the Authenticate via Phone activity in self-service and helpdesk workflows. When configuring this activity, you can specify AD LDS attributes from which phone numbers can be retrieved, and available authentication methods, i.e. SMS or automated voice call.

Phone numbers that belong to Private Branch Exchange (PBX) are also supported. PBX phones require either a live switchboard operator or an automated attendant to complete the call. By default, Password Manager supports automated attendant scenario. It can be configured for live operators by changing PhoneNumberExtensionType parameter in QPM.Service.Host.exe.config file. For automated attendants, set PhoneNumberExtensionType to 1 and for live operators, set PhoneNumberExtensionType to 2.

For PhoneNumberExtensionType set to 1 (DTMF digits are dialed), include commas in the PhoneNumberExtensionTemplate, where each comma represents one second pause in the dialing sequence. To increase the pause in the dialing sequence, add the required number of commas in PhoneNumberExtensionTemplate in the configuration file.

**NOTE:** The phone number extension must be configured with extension separator in the Active Directory. Phone number with extension must have 'x' or 'X' in it to separate the extension number from the phone number as given in the following examples:

- +91-98881234567 Extension 1234
- +91-98881234567 Ext 1234
- +91-98881234567 Extn 1234
- +91-98861234567 x 1234
- +91-98861234567 Ex 1234

For more information on configuring this activity, see Authenticate via Phone on page 96.

System Requirements

To use the phone-based authentication service, the following requirements must be met:

1. You have a valid license for the phone-based authentication service (see the About page of the Administration site for the service status).
2. Outbound SSL connections are allowed from the computer on which Password Manager Service runs to the following address: https://*.telesign.com. * can be replaced with any valid subdomain name, for example, https://api.telesign.com or https://www.telesign.com.
Configuring Management Policy

After initializing the Administration site, you need to configure the default Management Policy to enable users to use the Self-Service site.

The required settings you need to configure for the Management Policy are a user scope and secret questions.

Configuring Permissions for Access Account

When you connect to an AD LDS instance, you can create a new connection or use existing connections, if any. When creating the connection, you must specify an access account - an account under which Password Manager will access the AD LDS instance and a specified application directory partition. You can use the Password Manager Service account, an Active Directory account or an AD LDS account. These accounts must have the following minimum set of permissions:

- Membership in the Domain Users group (for the Password Manager Service account and the Active Directory account)
- Membership in the Readers group in the application directory partition (for the AD LDS account)
- Membership in the Administrators group in the configuration directory partition
- The Read permission for all attributes of user objects
- The Write permission for the following attributes of user objects: pwdLastSet, comment, unicodePwd, lockoutTime, msDS-UserAccountDisabled

**NOTE:** If the Storage attribute for Security questions under Reinitialization page is a custom value (say userParameters), then the Write permissions must be provided for that attribute instead of Comment attribute.

- The right to reset user passwords
- The permission to create user accounts and containers in the Users container
- The Read permission for attributes of the organizationalUnit object and container objects
- The Write permission for the gpLink attribute of the organizationalUnit objects and container objects
- The Read permission for the attributes of the container and serviceConnectionPoint objects in Group Policy containers
- The permission to create container objects in the System container
- The permission to create the serviceConnectionPoint objects in the System container
- The permission to delete the serviceConnectionPoint objects in the System container
The Write permission for the keywords attribute of the serviceConnectionPoint objects in the System container.

If you want to use the same connection in password policies as well, make sure the account has the following permissions:

- The Read permission for attributes of the groupPolicyContainer objects.
- The Write permission to create and delete the groupPolicyContainer objects in the System Policies container.
- The permission to create and delete container and the serviceConnectionPoint objects in Group Policy containers.
- The Read permission for the attributes of the container and serviceConnectionPoint objects in Group Policy containers.
- The Write permission for the serviceBindingInformation and displayName attributes of the serviceConnectionPoint objects in Group Policy containers.

**Corporate Authentication**

In the Register workflow, if the Admin selects Corporate authentication check box, user will only be able to review the corporate account details while registration. If Allow user to edit corporate details check box is selected, user will be able to update the respective corporate details such as Corporate email and Corporate phone number, provided that the details are not previously populated by administrator in the AD.

If Corporate authentication registration mode is selected in the Register activity, make sure that Domain management account has the following set of permissions.

1. The read permission for Corporate email attribute and Corporate phone attribute where, Mobile is the default attribute for the Corporate phone.
2. If Allow user to edit corporate details checkbox is selected under Corporate authentication check box, both Read and Write permission must be available for Corporate email attribute and Corporate phone attribute, where Mobile is the default attribute for the Corporate phone.

**NOTE:** If the Corporate phone attribute under Reinitialization page is a custom value(say, pager) then, the Read/Write Permissions need to be provided for that attribute instead of the mobile attribute.

**Connecting to AD LDS Instance**

After adding a connection to the user scope, you need to specify groups from the application directory partition that will be able to access the Self-Service site. By default, the group “Users” is included in the scope when you add the connection to the user scope. You can also restrict some groups from accessing the Self-Service site.
To connect to AD LDS instance

1. Open the Administration site by entering the Administration site URL in the address bar of your browser. By default, the URL is http(s)://<ComputerName>/PMAdminADLDS, where <ComputerName> is the name of the computer on which Password Manager is installed.

2. On the Administration site, select the Management Policy you want to configure and click the User Scope link.

3. On the User Scope page, click Connect to AD LDS instance.

4. If connections already exist, select a connection from the list. If you want to create a new connection, click Add new connection.

5. If you selected to create the new connection, in the Connect to AD LDS Instance dialog, configure the following options:
   
   - In the Server name on which AD LDS instance is installed text box, type the name of the server to which you want to connect.
   
   - In the Port number (LDAP or SSL) text box, enter the port number that you specified when installing the AD LDS instance. If you select the Use SSL check box, enter the SSL port number; otherwise, LDAP port number. It is recommended to use SSL in your production environment.
   
   - In the Application directory partition text box, enter the name of the application directory partition from the AD LDS instance to which you want to connect.
   
   - In the Application directory partition alias text box, type the alias for the application directory partition which will be used to address the partition on the Self-Service site.
   
   - In the Access account section, select Password Manager Service account to have Password Manager access the AD LDS instance using the Password Manager Service account, otherwise, select The following Active Directory account or The following AD LDS account radio button and enter the required user name and password.

   For information on how to prepare the access account, see Configuring Permissions for Access Account on page 59.

6. Click Save.

7. **NOTE:** When you add an AD LDS instance to the user scope, the group “Users” from the specified application directory partition is automatically included in the user scope.

To specify groups or OUs that are allowed to access the Self-Service site

1. On the Administration site, select the Management Policy you want to configure and click the User Scope link.

2. On the User Scope page, select the connection for which you want to specify groups or OUs and click Edit.
3. Do the following:
   - To specify the groups, click Add under Groups allowed access to the Self-Service site.
   - To specify the OUs, click Add under Organizational units allowed access to the Self-Service site.
4. Click Save.

**NOTE:** If you have the Domain Management account configured with a user other than the Active Directory Administrator then, provide Security permissions to all the groups, OUs that are added as Included groups, and Included OUs in the userscope.

If the users/ groups/ OUs included in the userscope, are a member of Readers/ Administrators group in the ADLDS then, the Write Permissions are already inherited.

To specify groups or OUs that are denied access to the Self-Service site
1. On the Administration site, select the Management Policy you want to configure and click the User Scope link.
2. On the User Scope page, select the connection for which you want to specify groups or OUs and click Edit.
3. Do the following:
   - To specify the groups, click Add under Groups denied access to the Self-Service site.
   - To specify the OUs, click Add under Organizational units denied access to the Self-Service site.
4. Click Save.

**Changing Access Account**

To access a managed AD LDS instance, you can use the Password Manager Service account, an Active Directory account or an AD LDS account. For more information on how to configure the access account, see Configuring Permissions for Access Account on page 59. Password Manager Service account is the account that was configured during Password Manager installation. Password Manager Service account may be used as the access account only when the Service account has all required permissions.

To modify account used to access an AD LDS instance
1. On the Administration site, select the Management Policy you want to configure and click the User Scope link.
2. On the User Scope page, select the connection for which you want to change access account and click Edit.
3. On the **User Scope Settings for #Application Directory Partition#** page, click **Edit**.

4. In the **Access account** section of the **Edit AD LDS Instance Connection** dialog, select **Password Manager Service account** to have Password Manager access the managed instance using the Password Manager Service account. Otherwise, select **The following Active Directory account** or **The following AD LDS account** and then enter the required user name and password.

5. Click **Save** and select how you want to apply the updated settings. You can either apply the new settings for this user scope only, or everywhere where this connection is used.

### Removing Connection to AD LDS Instance

**To remove a connection to AD LDS instance**

1. On the Administration site, select the Management Policy you want to configure and click the **User Scope** link.

2. On the **User Scope** page, select the connection you want to delete and click **Remove**. Note, that the connection will be removed from this user scope only. If you want to permanently remove the connection, remove it everywhere where it is used, and then on the **General Settings| AD LDS Instance Connections** tab, click **Remove** under the required connection.

### Adding Secret Questions

Secret questions are the main part of the Questions and Answers policy that allows authenticating users on the Self-Service site before users can perform any self-service tasks.

For more information on the Questions and Answers policy, see Configuring Questions and Answers Policy on page 72.

**To create secret questions in the default language**

1. Open the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http(s)://<ComputerName>/PMAdminADLDS/.

2. On the Administration site home page, click the **Add secret questions** link under the Management Policy you want to configure.

3. On the **Configure Questions and Answers Policy** page, click **Add questions in the default language**.

4. In the **Edit Questions in the Default Language** dialog box, specify mandatory, optional and helpdesk questions. To change the default language for secret questions click the **Change language** link.
5. Change questions’ order by clicking the appropriate links.
6. Click **Save** to save the questions and close the dialog box.

**IMPORTANT:** Modifying a question list does not affect existing personal Questions or Answers profiles unless the users have to update their profiles as a result of the enforcement rules that require users to update Q&A profiles when the question list is modified. For more information on the enforcement rules, see User Enforcement Rules on page 122.

### Editing and Deleting secret questions

Translation of questions can be made only to the questions that have been added in the default language.

**To delete questions of a default language**

1. Open the Administration site by typing the Administration site URL in the address bar of your web browser. By default, the URL is http(s)://<ComputerName>/PMAdminADLDS/.
2. On the Administration site home page, click the **Q&A Policy** link under the Management Policy.
3. On the **Configure Questions and Answers Policy** page, click **Edit questions** under **Question List**. The **Edit Questions in the Default Language** page appears.
4. Click **X** against the question that has to be deleted, and then click **Save**.

**To delete questions of a specific language**

1. Open the Administration site by typing the Administration site URL in the address bar of your web browser. By default, the URL is http(s)://<ComputerName>/PMAdminADLDS/.
2. On the Administration site home page, click the **Q&A Policy** link under the Management Policy.
3. On the **Configure Questions and Answers Policy** page, click the language for which the questions have to be deleted. The **Translate Questions** page appears.
4. Click **Delete questions**, and then click **OK**.

**To Edit questions of a default language**

1. On the home page of the Administration site, click **Q&A Policy** link under the Management Policy.
2. On the **Configure Questions and Answers Policy** page, under **Questions List**, click the **Edit questions** link.
3. In the **Edit questions in the Default Language** page, edit the required question.
4. Click **Save**.

**To Edit questions of a specific language**

1. On the home page of the Administration site, click **Q&A Policy** link under the Management Policy.
2. On the **Configure Questions and Answers Policy** page, navigate to the **Translations:** section and click the language for which the questions have to be edited.
3. In the translated text box against each of the questions, edit the required question.
4. Click **Save**.

**NOTE:**

- Q&A Policy supports multiple languages. It requires the Password Manager Administrator to configure the required languages for the users to see the same in the Self service site.
- **Change language** link appears in the self-service site only when the Password Manager administrator has translated the questions in the required languages.
Management Policies

Checklist: Configuring Password Manager for AD LDS
Understanding Management Policies
Configuring Access to the Administration Site
Configuring Access to the Legacy Self-Service Site and Password Manager Self-Service site
Configuring Access to the Helpdesk Site
Configuring Questions and Answers Policy
Workflow Overview
Custom Workflows
Custom Activities
Legacy Self-Service or Password Manager Self-Service site workflows
Helpdesk Workflows
User Enforcement Rules

Checklist: Configuring Password Manager for AD LDS

When you have installed Password Manager for AD LDS, follow this checklist to configure the solution to implement automated and secure password management in an AD LDS instance.

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Understanding Management Policies

Management Policy is a core element of Password Manager for AD LDS. Using the Management Policy you can configure workflows for registering new users, resetting passwords, and others. For each Management Policy you can configure a user scope, and delegate helpdesk tasks by configuring a helpdesk scope. You can configure multiple Management Policies with different user and helpdesk scopes, workflows and secret questions. The default Management Policy with preconfigured workflows is available out of the box.

A Management Policy consists of the following components:

- Questions and Answers policy
- User scope
- Helpdesk scope
- Workflows
- User enforcement rules

User scope is a group or several groups of users managed by Password Manager for AD LDS. When configuring the user scope for a Management Policy, you can add connections to multiple AD LDS instances. For more information about the user scope, see .

Helpdesk scope is a group of helpdesk operators who are allowed to manage users from the user scope of the same Management Policy. By configuring the helpdesk scope you can delegate administrative tasks to specified helpdesk operators. For more information about the helpdesk scope, see Configuring Access to the Helpdesk Site on page 69.

Questions and Answers policy (Q&A policy) is a policy within which secret questions and Q&A profile settings are defined. Secret questions are a set of mandatory, optional and helpdesk questions for users’ Questions and Answers profiles. These questions are used to register users with Password Manager for AD LDS and later to authenticate users when they use the Self-Service site. Q&A profile settings define how many questions a user must answer to create Q&A profile settings and set requirements for user’s questions and answers. For more information about Q&A policy, see Configuring Questions and Answers Policy on page 72.

All workflows are divided into two categories: self-service and helpdesk workflows. The self-service workflows define the tasks available to users on the Self-Service site, i.e. every configured workflow is a task on the Self-Service site. The helpdesk workflows define what tasks are available to helpdesk operators on the Helpdesk site. A workflow consists of several activities that you can add to or remove from the workflow to customize it.

The Default Management Policy offers preconfigured workflows. You can also create your own workflows. For more information about workflows, see Workflow Overview on page 78.

User enforcement rules allow you to set up the enforcement schedule to invite users to create or update their Q&A profiles and configure the reminder that will notify users to change passwords before password expiration. For more information, see User Enforcement Rules on page 122.
Configuring Access to the Administration Site

By default, the access to the Administration site is granted only to the domain user from the AD, who is a member of the local Administrators group and to the PMAdminADLDS group which is created during Password Manager for AD LDS installation.

To provide access to the Administration site, add the delegated administrators’ accounts to the PMAdminADLDS group and also add them to the IIS_IUSRS or Administrators group. Members of the referenced groups have access to the complete functionality of the Administration site.

Note, that the account which you specified as Application Pool Identity when installing Password Manager for AD LDS for AD LDS is automatically added to the PMAdminADLDS group.

**IMPORTANT:** Make sure to grant access to the Administration site only to the most trustworthy persons, since managing the Password Manager configuration may require dealing with user-sensitive information.

Configuring Access to the Legacy Self-Service Site and Password Manager Self-Service site

The Password Manager Self-Service site has all functionality similar to the Legacy Self-Service site with a new and improved user interface. The Password Manager Self-Service site can co-exist along with the already existing Legacy Self-Service site and it is possible to revert at any time to the Legacy Self-Service site.

To configure access to the Legacy Self-Service site, you need to configure a user scope for the Management Policy you want to use. The workflows and secret questions that you configure for the Management Policy will apply only to the user scope of this Management Policy. You can add connections to several AD LDS instances to a single user scope.

Configuring Access to the Helpdesk Site

In Password Manager for AD LDS you can easily delegate administrative tasks to dedicated helpdesk operators. By configuring the helpdesk scope you select groups of helpdesk operators who will have access to the Helpdesk site. The Helpdesk site handles typical tasks performed by helpdesk operators, such as resetting passwords, unlocking user accounts, assigning temporary passcodes, and others.
Members of the helpdesk scope are allowed to access the Helpdesk site and manage users from the user scope of the same Management Policy only.

You can also restrict groups of helpdesk operators from accessing the Helpdesk site.

To configure a helpdesk scope, you need to add a connection to an AD LDS instance to the scope at first, and then specify groups that will be allowed or denied access to the Helpdesk site.

To manage all connections from a single place, click General Settings | AD LDS Instance Connections on the Administration site. For more information, view AD LDS Instance Connections on page 152.

**To connect to AD LDS instance**

1. Open the Administration site by entering the Administration site URL in the address bar of your browser. By default, the URL is http(s)://<ComputerName>/PMAdminADLDS, where <ComputerName> is the name of the computer on which Password Manager for AD LDS is installed.

2. On the Administration site, select the Management Policy you want to configure and click the Helpdesk Scope link.

3. On the Helpdesk Scope page, click Connect to AD LDS instance.

4. If connections already exist, select a connection from the list. If you want to create a new connection, click Add new connection.

5. If you selected to create the new connection, in the Connect to AD LDS Instance dialog, configure the following options:
   - In the **Server name on which AD LDS instance is installed** text box, type the name of the server to which you want to connect.
   - In the **Port number (LDAP or SSL)** text box, enter the port number that you specified when installing the AD LDS instance. If you select the **Use SSL** check box, enter the SSL port number; otherwise, LDAP port number. It is recommended to use SSL in your production environment.
   - In the **Application directory partition** text box, enter the name of the application directory partition from the AD LDS instance to which you want to connect.
   - In the **Application directory partition alias** text box, type the alias for the application directory partition which will be used to address the partition on the Self-Service site.
   - In the **Access account** section, select Password Manager Service account to have Password Manager access the AD LDS instance using the Password Manager Service account, otherwise, select The following Active Directory account or The following AD LDS account radio button and enter the required user name and password.

   For information on how to prepare the access account, see Configuring Permissions for Access Account on page 59.

6. Click Save.
To specify groups or OUs that are allowed to access the Helpdesk site

1. On the Administration site, select the Management Policy you want to configure and click the Helpdesk Scope link.
2. On the Helpdesk Scope page, select the connection for which you want to specify groups or OUs and click Edit.
3. Do the following:
   - To specify the groups, click Add under Groups allowed access to the Helpdesk site.
   - To specify the OUs, click Add under Organizational units allowed access to the Helpdesk site.
4. Click Save.

To specify groups that are denied access to the Helpdesk site

1. On the Administration site, select the Management Policy you want to configure and click the Helpdesk Scope link.
2. On the Helpdesk Scope page, select the connection for which you want to specify groups or OUs and click Edit.
3. Do the following:
   - To specify the groups, click Add under Groups denied access to the Helpdesk site.
   - To specify the OUs, click Add under Organizational units denied access to the Helpdesk site.
4. Click Save.

Changing Access Account

To access a managed AD LDS instance, you can use the Password Manager Service account, an Active Directory account or an AD LDS account. For more information on how to configure the access account, see Configuring Permissions for Access Account on page 59. Password Manager Service account is the account that was configured during Password Manager for AD LDS installation. Password Manager Service account may be used as the access account only when the Service account has all required permissions.

To modify account used to access an AD LDS instance

1. On the Administration site, select the Management Policy you want to configure and click the Helpdesk Scope link.
2. On the Helpdesk Scope page, select the connection for which you want to change access account and click Edit.
4. In the **Access account** section of the **Edit AD LDS Instance Connection** dialog, select **Password Manager Service account** to have Password Manager for AD LDS access the managed instance using the Password Manager Service account. Otherwise, select **The following Active Directory account** or **The following AD LDS account** and then enter the required user name and password.

5. Click **Save** and select how you want to apply the updated settings. You can either apply the new settings for this helpdesk scope only, or everywhere where this connection is used.

**Removing Connection to AD LDS Instance**

**To remove a connection to AD LDS instance**

1. On the Administration site, select the Management Policy you want to configure and click the **Helpdesk Scope** link.

2. On the **Helpdesk Scope** page, select the connection you want to delete and click **Remove**. Note, that the connection will be removed from this helpdesk scope only. If you want to permanently remove the connection, remove it everywhere where it is used, and then on the **General Settings|AD LDS Instance Connections** tab, click **Remove** under the required connection.

**Configuring Questions and Answers Policy**

Questions and Answers policy allows you to create secret questions and specify Q&A profile settings. Secret questions are questions to which users provide answers when registering with Password Manager for AD LDS. Using the Q&A profile settings you can specify requirements for user’s questions and answers. For example, you can prevent users from using the same answer for multiple questions.

Q&A policy settings affect user authentication and registration enforcement process. For more information, see **Questions and Answers Policy Overview** on page 52.

**Creating Secret Questions**

Secret questions are questions to which users provide their own answers, thus creating a personal Questions and Answers profile. Before users can register with Password Manager for AD LDS by creating their personal Questions and Answers profiles, you must configure a question list containing the questions that will be presented to users.
You can create the question list in several languages, so that users can select a preferred language of questions and answers.

Password Manager for AD LDS uses personal Question and Answers profiles as an authentication method to allow users and helpdesk operators to manage user passwords in AD LDS instances and in multiple connected systems. A Q&A profile, or personal profile, is a set of questions specified by the Password Manager administrator, to which users must provide their secret answers that later can be used to authenticate the users. You can also require users to specify their own questions in their personal profiles. Then, users can securely reset their passwords or unlock their accounts by answering a series of questions from their personal profiles.

You can set requirements for answers that users specify in their Questions and Answers profiles. For example, you can prevent users from specifying the same answer for different questions, or set a minimum answer length. For more information, see Configuring Q&A Profile Settings on page 76.

Password Manager for AD LDS allows you to specify criteria for recognizing users’ Questions and Answers profiles as not compliant with the current password management settings. This is essential if you want users to update their profiles each time when Q&A policy settings are changed. Helpdesk operators can force users to update their Q&A profiles if the profiles do not comply with current Q&A policy.

For information on how to enforce update of Q&A profiles, see User Enforcement Rules on page 122.

Secret questions can contain the following types of questions:

<table>
<thead>
<tr>
<th>Question type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mandatory questions</td>
<td>Questions of this type are an integral part of a user’s Q&amp;A profile. Users must provide an answer to each of these questions. These questions can be stored using reversible encryption or hashed.</td>
</tr>
<tr>
<td>Optional questions</td>
<td>Users can select what optional questions to answer. Administrator specifies only the number of questions that users must answer. These questions can be stored using reversible encryption or hashed.</td>
</tr>
<tr>
<td>Helpdesk questions</td>
<td>Security questions used by helpdesk to verify user’s identity before performing password- and account management tasks. These questions are always stored using reversible encryption.</td>
</tr>
<tr>
<td>User-defined</td>
<td>Questions that must be created by the user.</td>
</tr>
</tbody>
</table>

For users to be able to create their personal Questions and Answers profiles, you must specify at least one secret question.
To create secret questions in the default language

1. Open the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http(s)://<ComputerName>/PMAadminADLDS/.
2. On the Administration site home page, click the Q&A Policy link under the Management Policy you want to configure.
3. On the Configure Questions and Answers Policy page, select the default language for secret questions by clicking the language link in the Default language option.
4. Under Question List, click the Edit questions link to specify mandatory, optional and helpdesk questions in the default language.
5. In the Edit Questions in the Default Language dialog box, specify mandatory, optional and helpdesk questions.
6. Change questions’ order by clicking the appropriate links.
7. Click Save to save the questions and close the dialog box.

**IMPORTANT:** If you add a questions to the question list in the default language, all translations of the question list will not be configured until you change them accordingly. This means that users will not be able to use the disabled languages for creating Q&A profiles. If you remove a question from the question list in the default language, this question will be automatically removed from translations of the question list.

**IMPORTANT:** Modifying a question list does not affect existing personal Questions or Answers profiles unless the users have to update their profiles as a result of the enforcement rules that require users to update Q&A profiles when the question list is modified. For more information on the enforcement rules, see User Enforcement Rules on page 122.

To translate secret questions

1. Open the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http(s)://<ComputerName>/PMAadminADLDS/.
2. On the Administration site home page, click the Q&A Policy link under the Management Policy you want to configure.
3. On the Configure Questions and Answers Policy page, under Question List, click the Translate questions link.
4. In the Select Additional Language dialog box, select an additional language for secret questions.
5. In the Translate Questions dialog box, translate mandatory, optional and helpdesk questions from the default language into the additional language.
6. To change the language, click the Change language link.
7. To temporarily hide secret questions in the selected language, select the **Make questions in this language unavailable to users** check box. This setting will prevent users from creating or updating their Q&A profiles using the question list in this language.

8. Click **Save** to save changes and close the dialog box.

**IMPORTANT:** If you deleted the translated question list, all users who have created their Questions and Answers profiles will be forced to update their Q&A profiles, if you have configured the enforcement rule. For more information, see **Invite Users to Create/Update Profiles** on page 122.

## Editing and Deleting secret questions

Translation of questions can be made only to the questions that have been added in the default language.

### To delete questions of a default language

1. Open the Administration site by typing the Administration site URL in the address bar of your web browser. By default, the URL is http(s)://<ComputerName>/PMAdminADLDS/.
2. On the Administration site home page, click the **Q&A Policy** link under the Management Policy.
3. On the **Configure Questions and Answers Policy** page, click **Edit questions** under **Question List**. The **Edit Questions in the Default Language** page appears.
4. Click **X** against the question that has to be deleted, and then click **Save**.

### To delete questions of a specific language

1. Open the Administration site by typing the Administration site URL in the address bar of your web browser. By default, the URL is http(s)://<ComputerName>/PMAdminADLDS/.
2. On the Administration site home page, click the **Q&A Policy** link under the Management Policy.
3. On the **Configure Questions and Answers Policy** page, click the language for which the questions have to be deleted. The **Translate Questions** page appears.
4. Click **Delete questions**, and then click **OK**.

### To Edit questions of a default language

1. On the home page of the Administration site, click **Q&A Policy** link under the Management Policy.
2. On the Configure Questions and Answers Policy page, under Questions List, click the Edit questions link.
3. In the Edit questions in the Default Language page, edit the required question.
4. Click Save.

**To Edit questions of a specific language**

1. On the home page of the Administration site, click Q&A Policy link under the Management Policy.
2. On the Configure Questions and Answers Policy page, navigate to the Translations: section and click the language for which the questions have to be edited.
3. In the translated text box against each of the questions, edit the required question.
4. Click Save.

<table>
<thead>
<tr>
<th>NOTE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q&amp;A Policy supports multiple languages. It requires the Password Manager Administrator to configure the required languages for the users to see the same in the Self service site.</td>
</tr>
<tr>
<td>Change language link appears in the self-service site only when the Password Manager administrator has translated the questions in the required languages.</td>
</tr>
</tbody>
</table>

**Configuring Q&A Profile Settings**

Q&A profile settings allow you to define settings and requirements for user’s questions and answers. For example, you can prevent users from using the same answer for multiple questions. Questions and answers that do not comply with the policy will not be accepted.

**To configure Questions and Answers policy**

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.
   
   | NOTE: | When prompted to log in, provide your domain user name in a domain-name\username format. |

2. On the Administration site home page, click the Q&A Policy link under the Management Policy you want to configure.
3. On the Configure Questions and Answers Policy page, click the Q&A profile settings link.
4. In the Q&A Profile Settings dialog box, specify the following options:
### Table 8: Questions and Answers profile settings

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Question Settings</strong></td>
<td></td>
</tr>
<tr>
<td>Users must answer this number of optional questions to register</td>
<td>Set the required number of optional questions that a user must answer to create a Questions and Answers profile.</td>
</tr>
<tr>
<td>Users must answer this number of user-defined questions to register</td>
<td>Set the required number of user-defined questions that a user must specify to create a Questions and Answers profile.</td>
</tr>
<tr>
<td>Minimum length of user-defined questions</td>
<td>Set the minimum number of characters that user-defined questions can contain.</td>
</tr>
<tr>
<td><strong>Answer Settings</strong></td>
<td></td>
</tr>
<tr>
<td>Minimum length of answers</td>
<td>Set the minimum number of characters that users' answers can contain.</td>
</tr>
<tr>
<td>Reject the same answers for different questions</td>
<td>Select to prevent users from specifying same answers for different questions.</td>
</tr>
<tr>
<td>Reject answers that contain corresponding questions</td>
<td>Select to prevent users from specifying answers that contain corresponding questions.</td>
</tr>
<tr>
<td>Store answers using reversible encryption</td>
<td>Select to store users' answers using reversible encryption. If you do not select this option, answers to mandatory, optional and user-defined questions are hashed. Note, that answers to helpdesk questions are always stored using reversible encryption, even if this option is not selected.</td>
</tr>
<tr>
<td><strong>Security Settings</strong></td>
<td></td>
</tr>
<tr>
<td>Allow users to hide their answers</td>
<td>Select this check box to allow users to hide their answers on the screen, so that answer entry fields will look like a series of asterisks.</td>
</tr>
<tr>
<td>Hide users’ answers by default</td>
<td>Select this check box to have Password Manager for AD LDS display users' answers as asterisks while they are typing in their answers.</td>
</tr>
<tr>
<td>Do not require users to confirm answers if answers are hidden</td>
<td>Select this check box to allow users to enter their answers only once, if answers are hidden.</td>
</tr>
</tbody>
</table>
5. Click **Save**.

**Workflow Overview**

Workflows allow an administrator to define the behavior of Password Manager for AD LDS: what tasks and with what configuration are available to users and helpdesk operators. Workflows are divided into two categories: self-service and helpdesk.

Self-service workflows define the behavior of the Self-Service site. All configured and enabled self-service workflows will be available on the Self-Service site as tasks available to Password Manager users. To modify the task behavior, edit the corresponding workflow.

Helpdesk workflows define the behavior of the Helpdesk site. All configured and enabled helpdesk workflows will be available on the Helpdesk site as tasks available to helpdesk operators. To modify the task behavior, edit the corresponding workflow.

**Workflow Structure**

A workflow consists of activities; each activity can be configured independently of other activities.

Activities are grouped into three categories: authentication, actions and notifications. You can also create custom activities. For more information, see [Custom Activities](#) on page 82.

Authentication activities are a group of activities that provide different authentication options, for example authentication with password or Questions and Answers profiles, or phone-based authentication.

The actions category includes activities that are core components of the workflows, for example Unlock Account, Edit Q&A Profile, Reset Password, and other activities.

Notification activities are activities that you can use to configure email notifications for users and administrators, and specify conditions under which the notifications should be sent.

All available activities are displayed in the left pane of a workflow designer. To add an activity to a workflow, simply drag the activity to the right pane of the workflow designer. To remove an activity, click the Remove link on the activity box.

The right pane of the workflow designer displays a workflow structure: which activities should be performed and in what order. The activities are executed in the order they appear in the workflow designer. You can change their order by moving activities up or down in the workflow designer.
Workflow State

A workflow can be in one of the three states: success, failure, critical error. These states determine how a workflow is performed, i.e. what activities are executed.

If no errors occur during a workflow execution, the workflow state is success. In this state, all activities present in the workflow are performed except Email user if workflow fails, Email administrator if workflow fails, Lock Q&A profile, and Restart workflow if error occurs.

If an error occurs when performing an activity, the failure state is set for the workflow. After this, only the following activities are performed (if such activities are present in the workflow): Email user if workflow fails, Email administrator if workflow fails, Lock Q&A profile, and Restart workflow if error occurs. Note that the Restart workflow if error occurs activity resets the workflow state to success and reruns the workflow from the beginning.

If a critical error occurs, for example user’s account or Q&A profile gets locked, the critical error state is set for the workflow. Then only the Email user if workflow fails and Email administrator if workflow fails activities are performed, if they are included in the workflow. After these activities are performed, the workflow is stopped.

Workflow Settings

For each workflow you can set the availability settings (whether the workflow is enabled and displayed on the Self-Service or Helpdesk site) and the language settings.

The language settings allow you to specify a custom name and description of a workflow for the Self-Service or Helpdesk site in the default and additional languages (only the languages to which the Self-Service and Helpdesk sites are localized are available).

To specify language settings

1. On the Home page of the Administration site, click the required workflow, hover over the workflow designer, and click Workflow settings.
2. On the Languages tab of the Workflow Settings dialog box, edit the workflow name and the description in the default language, and click OK.
3. To edit the workflow name and the description in other languages, click Add new language, select a language, enter the name and the description in the selected language and click OK.

To specify availability settings

1. On the Home page of the Administration site, click the required workflow, hover over the workflow designer, and click Workflow settings.
2. On the Availability tab of the Workflow Settings dialog box, specify the following options in the Enable the workflow section:
- **Always** - select this option to make the workflow permanently enabled for users on the Self-Service site or for helpdesk operators on the Helpdesk site.
- **Never** - select this option to permanently disable the workflow on the Self-Service or Helpdesk site. Users or helpdesk operators will not be able to use the workflow.
- **Depending on the current user status** select this option to enable workflows on the Self-Service or Helpdesk site according to the user status. The following are the default criteria for enabling and disabling workflows on the Self-Service site. If a user is not registered with Password Manager, only **Register** workflow is enabled, if the user’s account is locked, but the user is registered, then **Forgot My Password, Unlock My Account** workflows are enabled. If a user is not registered with Password Manager, **I Have a Passcode** workflow is enabled only if Helpdesk user does a **Assign Passcode** for this user. If a user is registered with Password Manager, **Forgot My Password, Manage My Passwords** workflows are enabled, and I Have a Passcode workflow is enabled only if Helpdesk user does a **Assign Passcode** for this user. If the user’s Q&A profile is locked, then no default workflows are enabled on the Self-Service site, and the user should contact Helpdesk. The following are the default criteria for enabling and disabling workflows on the Helpdesk site: if the user is not registered, then **Reset Password, Unlock Account, and Assign Passcode** workflows are enabled. If the user’s account or Q&A profile is locked, but the user is registered, then all Helpdesk workflows are enabled.

**IMPORTANT:** If an unregistered user is registering for the first time and tries to enter a wrong password beyond the specified limit, the profile shall be locked out. The user has to wait for the duration configured for **Reset lockout Account**.

3. In the **Show the workflow** section, specify the following options and click **OK**:
- **Always** - select this option to permanently display the workflow on the Self-Service or Helpdesk site. The workflow may be enabled or disabled.
- **Never** - select this option to permanently hide the workflow on the Self-Service or Helpdesk site. The workflow may be enabled or disabled.
- **Only if the workflow is enabled** - select this option to show the workflow on the Self-Service or Helpdesk site only when the workflow is enabled.

## Custom Workflows

You can extend the built-in workflow functionality by creating custom workflows. You can design such workflows that fit your organization’s needs. There are two types of custom workflows: self-service and helpdesk.
To create a custom workflow

1. On the Home page of the Administration site, click **New Workflow** under the Management Policy to which you want to add a workflow.
2. In the **Add New Workflow** dialog box, select the workflow type and enter the workflow name and description in the default language.
3. Click **Save.**

When you add a new workflow, it does not have any activities. Fill the workflow with required activities in the workflow designer.

For each workflow, you should specify the name and description in the default language that will be displayed on the Self-Service or Helpdesk site. You can also specify the workflow name and description in other languages (only the languages to which the Self-Service and Helpdesk sites are localized are available). For more information, see **Workflow Settings** on page 79.

Importing and Exporting Workflows

Import/export workflow functionality allows you to share your configured workflows effortlessly. For example, if you want to use a configured workflow from Management Policy 1 in Management Policy 2, you do not need to manually configure all workflow activities and settings in Management Policy 2. Simply export the workflow from the first Management Policy and import the workflow to the second Management Policy.

Note, that this functionality is available only after you turn on the extensibility features.

To turn extensibility features on

1. Open the Administration site and click the **General Settings** tab.
2. On the General Settings page, select the **Extensibility** tab.
3. On the Extensibility settings page, click the upper **Turn on** button.

To export workflow

1. On the Home page of the Administration site, click the required workflow, hover over the workflow designer, and click **Export workflow.**
2. Depending on your browser settings, specify where you want to save the archive file and download the archive.

When you import workflows, note that existing workflows with the same name will be replaced. You can back up existing workflows by exporting them when prompted.

**IMPORTANT:** When you import workflows, it is strongly recommended to audit scripts of custom activities included in workflows before using workflows in a production environment. This is required because security-sensitive information can be accessed via PowerShell scripts included in a custom activity. Import workflows from a trusted source only.
IMPORTANT: If the workflow you are importing contains activities that are missing from the current configuration, import the missing activities first (from the same workflow archive file), and import the workflow itself.

**To import workflow**

1. On the Home page of the Administration site, select the Management Policy to which you want to import a workflow and click **Import Workflow**.
2. In the **Import Workflow** dialog box, click **Upload** to select the workflow archive file and then click **OK**.

**Custom Activities**

There are two options to create a custom activity: you can create a custom activity from scratch or convert a built-in activity to custom.

For any custom activity, you can specify a display name, a short name (used to address the activity in scripts), a description (used on the Administration site), and add PowerShell script to the activity. When you create the custom activity from scratch, you can also select user interface elements and enter the main instruction for the page of the Self-Service or Helpdesk site that will be displayed when the activity is executed.

Note, that you cannot specify any user interface elements for custom activities converted from built-in ones. If you want set user interface elements for your custom activity, create it from scratch.

For more information on writing PowerShell scripts for custom activities, refer to the Password Manager SDK.

IMPORTANT: Note, you can create custom activities only after you turn on the extensibility features. You can turn on the extensibility features on the General Settings tab of the Administration site.

**Custom Activity Settings**

When you use custom activities in your workflows, you need to understand how shared settings of custom activities work.

All settings (display name, short name, description, PowerShell script, and user interface elements) that you specify for custom activities created from scratch are shared i.e. if you modify any of these settings for a custom activity included in or excluded from a workflow, the changes will be automatically propagated to all instances of this activity in all workflows and Management Policies.

If you create a custom activity by converting a built-in activity, the custom activity has two types of settings: built-in and shared. Built-in settings are the settings inherited from the built-in activity. Such settings are not shared: if you modify them, the changes will be
applied only to the current activity instance. But if you modify the shared settings (display name, short name, description, PowerShell script), such changes will be propagated throughout all instances of this activity.

For example, if you modify the PowerShell script for your custom activity "My Custom CAPTCHA", when you save the activity, the updated settings will be applied to all instances of the "My Custom CAPTCHA" activity used in other workflows and Management Policies. But if you modify the built-in setting (noise level) of the "My Custom CAPTCHA" activity, when you save the activity, the changes will be applied only to this instance of the activity. The noise level setting of other instances of the "My Custom CAPTCHA" activity will not be changed.

Creating Custom Activities

When you create a custom activity from scratch or by converting a built-in activity, the created custom activity in the Custom group of the activities list in the workflow designer. If you want to copy the created activity, hover over the activity in the left pane of the workflow designer, and click Copy.

Note, that this functionality is available only after you turn on the extensibility features.

To turn extensibility features on

1. Open the Administration site and click the General Settings tab.
2. On the General Settings page, select the Extensibility tab.
3. On the Extensibility settings page, click the upper Turn on button.

To create a custom activity from scratch

1. On the Administration site, open the workflow designer, expand the Custom group in the left pane, and click Add new custom activity.
2. On the User Interface Designer tab, enter the main instruction for the activity in the default language. You can translate the main instruction text into other languages by clicking the Add new language link. This text will be displayed on the page of the Self-Service or Helpdesk site page when the activity is executed. Any user interface elements that you add will be displayed below the main instruction.
3. To add user interface elements, click Add new element in the User interface elements section.
4. In the Add New Element dialog box, select the user interface element you want to add, enter the element’s ID and label. Select the following options if required, and click OK:
   - Disable the element on the user interface - select this check box if you want to make this element disabled on the Self-Service or Helpdesk site.
   - Hide the element on the user interface - select this check box if you want to hide this element from the Self-Service or Helpdesk site.
5. On the **Activity Name** tab, specify the following options:
   - **Activity short name** - the activity name that should be used in PowerShell scripts to refer to the activity.
   - **Activity display name** - the activity name displayed in the activities list and workflow designer
   - **Activity description** - your description of the custom activity.

6. On the **PowerShell Script** tab, enter the PowerShell script to set the activity behavior. For more information on how to create and use activity scripts, refer to the Password Manager SDK.

7. Click **OK**.

Any built-in activity (self-service or helpdesk) can be converted to a custom one by clicking the **Convert to custom activity** link on a built-in activity in the activities list or the workflow designer. If you want to copy the created activity, hover over the activity in the left pane of the workflow designer, and click **Copy**.

**To convert a built-in activity to a custom activity**

1. On the Administration site, open the workflow designer, select the built-in activity you want to convert and click the **Convert to custom activity** link on the activity.
2. Hover over the created activity and click the **Shared settings** link.
3. On the **Activity Name** tab, specify the following options:
   - **Activity short name** - the activity name that should be used in PowerShell scripts to refer to the activity.
   - **Activity display name** - the activity name displayed in the activities list and workflow designer
   - **Activity description** - your description of the custom activity.
4. On the **PowerShell Script** tab, enter the PowerShell script to set the activity behavior. For more information on how to create and use activity scripts, refer to the Password Manager SDK.
5. Click **OK**.

**Importing and Exporting Custom Activities**

Using the import/export custom activity functionality you can effortlessly share and copy custom activities that you created. If you want to reuse a custom activity in another workflow, export the activity to an archive file and then import it to the required workflow.

Note, that you can import and export custom activities only.

Note, that this functionality is available only after you turn on the extensibility features.
To turn extensibility features on

1. Open the Administration site and click the General Settings tab.
2. On the General Settings page, select the Extensibility tab.
3. On the Extensibility settings page, click the upper Turn on button.

To export custom activity

1. On the Administration site, open the workflow designer, expand the Custom group in the left pane of the workflow designer, hover over the custom activity you want to export and click Export.
2. Depending on your browser settings, specify where you want to save the archive file and download the archive.

When you import custom activities, note that existing custom activities with the same name will be replaced. You can back up existing activities by exporting them when prompted.

**IMPORTANT:** When you import custom activities, it is strongly recommended to audit activities’ scripts before using activities in a production environment, because security-sensitive information can be accessed via PowerShell scripts included in a custom activity. Import custom activities from a trusted source only.

To import custom activity

1. On the Administration site, open the workflow designer, expand the Custom group in the left pane of the workflow designer, click Import custom activity.
2. In the Import Custom Activity dialog box, click Upload to select the activity archive file and then click OK.

Removing Custom Activities

To remove a custom activity, click the Remove link on the custom activity in the workflow designer or in the activities list. Note, you can permanently remove the custom activity only if it is removed from all workflows where it is used first.

Legacy Self-Service or Password Manager Self-Service site workflows

The Password Manager Self-Service site has all functionality similar to the Legacy Self-Service site with a new and improved user interface. The Password Manager Self-Service site can co-exist along with the already existing Self-Service site and you can select to revert anytime to the Legacy Self-Service site.
By configuring the self-service workflows you can specify what tasks will be available for users on the Self-Service site, and configure options for each available task. Preconfigured self-service workflows are available out of the box. You can always customize the workflow, add activities to or remove them from the workflow. You can also create custom activities and custom workflows. For more information, see Custom Workflows on page 80 and Custom Activities on page 82.

The following are the available built-in self-service workflows:

- Register
- Manage My Profile
- Forgot My Password
- Manage My Passwords
- Unlock My Account
- My Notifications
- I Have a Passcode

All built-in workflows have required activities and are ready-to-use.

The self-service workflows correspond to the tasks on the Self-Service site. If you enable a self-service workflow, the corresponding task will be available to users on the Self-Service site.

The self-service workflows provide the ability to combine different authentication options in a single workflow. For example, you can configure the authentication activities so that all secret questions are displayed on a single page, or only one secret question is displayed at a time. You can combine different authentication options such as authentication with Questions and Answers profile, Defender and phone-based authentication in a single workflow.

**Register**

Use this workflow to select which registration methods to display on the User site.

*Select registration mode* allows the administrator to configure, which registration methods are allowed for registration to the users. Following are the three methods available for the users to register.

- Corporate Authentication
- Security Questions
- Personal contact method: Email and Mobile

The selected options will be added in the Password Manager User site.

![NOTE:](image) When the administrator select registration method(s), only the respective authentication methods are visible to the administrator in Authentication methods.

Select one of the radio buttons to set the method as mandatory registration method. The administrator can set a method mandatory from *Select the registration method that...*
must be set as the mandatory registration method for users in the User site.
When the administrator selects a method as mandatory, it is compulsory for users for
registration in the User site. To set as mandatory registration method for the users in the
Password Manager User site, select one of the following options.

- Corporate Authentication
- Security Questions
- Personal contact method: Email and Mobile
- Allow user to choose

Configuring country code drop-down menu

You can configure the options to add, remove, or modify the country code drop-
down menu.
To modify the view of the drop-down menu to display the country name or the country
code, navigate to the location where Password Manager is installed. Open the
QPM.Service.Host.exe.config file. Add the required details in the <CountryConfig
ShowWith="Attribute"> tag, where "Attribute" can be CountryName or
CountryCode.
To add a new country code, provide the required details in the <add
CountryName="<required country name>" CountryCode="<required country
code>" ISDCode="<required ISD code>">
Restart the Password Manager service to view the updates in the country code
drop-down menu.

Manage My Profile

The Manage My Profile workflow allows the administrator to manage user profiles in Active
Directory by using the Admin site. Manage My Profile uses settings of Register workflow.
Use this workflow only if the user's Questions & Answers profile is pending for update. To
configure, do the following.

1. Select Manage My Profile workflow.
2. Click Settings.
3. Select Run this activity only if user's profile should be updated check box.

NOTE: In case of an upgrade from 5.8.2 to 5.9.x, if the user is registered with
Personal Contact Method(Mobile) in 5.8.2, then the user will be prompted to re-
enter the country code as well as the mobile number, the very first-time(post-
upgrade to 5.9.x) while trying to update the profile through the Manage My Profile
workflow.
Forgot My Password

You can use this workflow to configure the Forgot My Password task for the Self-Service site. The Forgot My Password task allows users to reset passwords for their accounts in AD LDS and in connected data sources (if integration with One Identity Quick Connect Sync Engine is configured) by using the Self-Service site. For more information on using One Identity Quick Connect Sync Engine, see Reset Password in AD LDS and Connected Systems on page 98.

**IMPORTANT:** To display password policies on the Self-Service site when users reset passwords, add connections to AD LDS instances on the Password Policies tab of the Administration site. For more information see Creating a Password Policy on page 165.

The default configuration of this workflow is the following:

1. Authentication Methods
2. Lock Q&A profile.
3. Reset password in AD LDS.
4. Restart workflow if error occurs.
5. Email user if workflow succeeds.
6. Email user if workflow fails.

Manage My Passwords

You can use this workflow to configure the Manage My Passwords task for the Self-Service site. By using this task, users can manage passwords for their accounts in AD LDS and in connected data sources (if integration with One Identity Quick Connect Sync Engine is configured), by using the Self-Service site. For more information on using One Identity Quick Connect Sync Engine, see Change Password in AD LDS and Connected Systems on page 100.

**IMPORTANT:** To display password policies on the Self-Service site when users change passwords, add the required application director partitions on the Password Policies tab of the Administration site. For more information see Creating a Password Policy on page 165.

The default configuration of this workflow is the following:

1. Authenticate with password.
2. Change password in AD LDS.
3. Restart workflow if error occurs.
4. Email user if workflow succeeds.
5. Email user if workflow fails.
Unlock My Account

You can use this workflow to configure the Unlock My Account task for the Self-Service site. Users use this task to unlock their accounts if they are locked out.

The default configuration of this workflow is the following:

1. Authentication Methods
2. Lock Q&A profile.
3. Unlock account.
4. Restart workflow if error occurs.
5. Email user if workflow succeeds.
6. Email user if workflow fails.

My Notifications

You can use this workflow to configure the My Notifications task for the Self-Service site. Users perform this task to select what email notifications they want to receive when specified events occur.

The default configuration of this workflow is the following:

1. Authenticate with password.
2. Subscribe to notifications.
3. Restart workflow if error occurs.
4. Email user if workflow succeeds.
5. Email user if workflow fails.

I Have a Passcode

You can use this workflow to configure the I Have a Passcode task for the Self-Service site. Users perform this task when they have forgotten their passwords and, at the same time, are not registered with Password Manager for AD LDS or have forgotten their answers to secret questions. In this case, they must obtain a temporary passcode from the help desk before they can create or update Questions and Answers profiles and reset passwords.

The default configuration of this workflow is the following:

1. Authenticate with passcode.
2. Edit Q&A Profile.
3. Restart workflow if error occurs.
4. Email user if workflow succeeds.
5. Email user if workflow fails.

Overview of Built-in Legacy Self-Service and Password Manager Self-Service site Activities

The Password Manager Self-Service site has all functionality similar to the Legacy Self-Service site with a new and improved user interface. The Password Manager Self-Service site can co-exist along with the already existing Self-Service site and you can select to revert anytime to the Legacy Self-Service site.

All built-in activities available in the self-service workflows fall into the following categories: authentication, actions, and notifications.

Authentication activities are activities that provide different authentication options, for example authentication with password or Questions and Answers profiles, or phone-based authentication.

The actions category includes activities that are core components of the built-in self-service workflows, for example Unlock Account, Edit Q&A Profile, and other activities.

Notification activities are activities that you can use to configure email notifications for users and administrators, and specify conditions under which the notifications should be sent.

The following sections describe the built-in self-service activities and provide information about the settings specific to each activity.

Authentication Activities

This section describes built-in activities that provide different authentication options.

Display CAPTCHA

Use this activity to display a CAPTCHA image on the Self-Service site and require users to enter the displayed characters before beginning a workflow. This feature provides enhanced protection against automated attacks.

This activity has the following settings:

- **Number of characters.** Specify the number of characters that will be displayed on a CAPTCHA image.
- **Noise level.** Select the noise level for a CAPTCHA image. The higher the level the more difficult it will be to read the characters.
Display reCAPTCHA

Use this activity to display a reCAPTCHA image on the Self-Service site and require users to enter the displayed characters before beginning a workflow. This feature provides enhanced protection against automated attacks.

reCAPTCHA is a free CAPTCHA service provided by Google.

To start using reCAPTCHA you need to sign up and get reCAPTCHA keys on the following Web site: http://www.google.com/recaptcha.

When getting the keys, provide the DNS name of the domain where Password Manager Self-Service sites are installed. If the Self-Service sites are installed in different domains, select the **Enable this key on all domains** check box to create a global key.

To learn more about using and configuring reCAPTCHA, go to http://www.google.com/recaptcha/learnmore.

This activity has the following settings:

- **Public key.** Specify the public key you received when configuring reCAPTCHA.
- **Private key.** Specify the private key you received when configuring reCAPTCHA.
- **Theme.** Select a color theme for the reCAPTCHA widget.

Authentication Methods

Use this activity to select which authentication methods to display in the User site. The three types of authentication methods available to select for the administrator are as follows:

- Security questions
- Corporate authentication
- Personal Email

**IMPORTANT:** The administrator can select any one of the activities selected in the registration method, to make it default mode for authentication for the users on the User site. Select one of the settings radio buttons from the right side to make it default authentication method.

**NOTE:**

- When the administrator select registration method(s), only the respective authentication methods are visible to the administrator in Authentication methods. See Register
- If the Administrator has selected Allow user to edit corporate details in corporate authentication of registration mode, a user cannot update the corporate email and corporate mobile number, if they are already populated.
Security Questions

Use this activity to authenticate a user with the personal Questions and Answers profile. In this activity, the administrator can specify how many questions from the Questions and Answers profile the user must answer for authentication. There are two methods to authenticate the users using Q&A method.

- **Authenticate with Q&A Profile (Random Questions):** See Authenticate with Q&A Profile (Random Questions)
- **Authenticate with Q&A Profile (Specific questions):** See Authenticate with Q&A Profile (Specific Questions)

Corporate Authentication

Use this activity to authenticate a user with a mobile device. There are three methods to authenticate the users using a mobile device.

- **Authenticate with Starling Two-Factor Authentication:** See Authenticate with Starling Two-Factor Authentication.
- **Authenticate with RADIUS Two-Factor Authentication:** See Authenticate with RADIUS Two-Factor Authentication
- **Authenticate via Phone:** See Use this activity to include phone-based authentication in a self-service workflow. If your license includes phone-based authentication service, you will be able to configure and use this activity.

Personal Email

**Authenticate via Passcode:** Use this activity to authenticate the users with a passcode. The administrator can configure passcode length and expiry time limit for the passcode.

Authenticate with Password

Use this activity to authenticate users by their passwords when running a workflow.

This activity has the following settings:

- **Authenticate users with expired passwords.** Select this check box to grant access to the Self-Service site to users who are required to change their passwords at next logon. If you clear this check box, users will be denied any access to Password Manager for AD LDS functionality when their passwords are expired or should be changed at next logon.

- **Authenticate users with disabled accounts.** If you select this check box, Password Manager for AD LDS will allow users whose accounts are disabled to unlock and re-enable their accounts, reset and manage passwords by using their Q&A profiles.
Authenticate with Q&A Profile (Random Questions)

Use this activity to authenticate a user with the personal Questions and Answers profile. In this activity you can specify how many questions from the Questions and Answers profile the user must answer to be authenticated. But you cannot select specific questions from user’s Q&A profile. To require users to answer specific questions from their Q&A profiles, use the **Authenticate with Q&A profile (specific questions)** activity.

You can configure this activity to display all questions on a single page or only one or the specified number of questions at a time, so that users will not be able to see next questions before they answer the current ones. To display all questions on a single page, use this activity one time in a workflow. To display questions consecutively on several pages, use this activity several times in a workflow (place several **Authenticate with Q&A profile (random questions)** activities in a row).

This activity has the following settings:

1. **All questions from user’s Q&A profile.** Select this option to have users answer all questions from their Q&A profiles during authentication.
2. **This number of randomly selected questions.** Select this option to set the number of questions required to authenticate users. You can specify what types of secret questions (mandatory, optional or user-defined) should be used to authenticate the user by selecting corresponding check boxes.
3. **Do the following if the number of questions in user’s Q&A profile is less than specified.** Using this option you can either allow or prohibit authentication for users if their Q&A profiles do not have enough secret questions. If you allow authentication, then all questions from the Q&A profile will be used to authenticate a user. If you decide to prohibit authentication, the workflow in which this activity is used will not be performed. The user will have to update his Q&A profile first, after that he will be able to perform the task that contains this authentication activity.

**Allow users to see what questions were answered incorrectly.** Select this check box to allow users to see to what questions they have provided incorrect answers during authentication.

Authenticate with Q&A Profile (Specific Questions)

Use this activity to authenticate a user with the personal Questions and Answers profile. In this activity you can select specific questions from user’s Q&A profile that the user must answer to be authenticated.

You can configure this activity to display all questions on a single page or only one or specified number of questions at a time, so that users will not be able to see next questions before they answer the current ones. To display all questions on a single page, use this activity one time in a workflow and select the required questions. To display questions consecutively on several pages, use this activity several times in a workflow (place several **Authenticate with Q&A profile (specific questions)** activities in a row).

This activity has the following settings:
Mandatory questions. Specify mandatory questions from users’ Q&A profiles that users will answer during authentication.

Optional questions. Specify optional questions from users’ Q&A profiles that users will answer during authentication.

User-defined questions. Specify user-defined questions from users’ Q&A profiles that users will answer during authentication.

Allow users to see what questions were answered incorrectly. Select this check box to allow users to see to what questions they have provided incorrect answers during authentication.

IMPORTANT: If the questions you selected in this activity cannot be found in user’s Q&A profile, the user will not be authenticated and the workflow containing this activity will not be performed for this user. The user will have to update his Q&A profile to answer the required secret questions.

Authenticate with Defender

IMPORTANT:

- Authenticating with Defender is an activity not supported with the current release of Password Manager ADLDS.
- Change or Reset password in Active Directory and connected systems is not supported in ADLDS.

You can use this activity to configure Password Manager for AD LDS to use Defender to authenticate users.

Defender is a two-factor authentication solution that authenticates users without forcing them to remember another new password. Defender uses one-time passwords (OTP) generated by special hardware or software tokens. Even if an attacker captures the password, there will be no security violation, since the password is valid only for one-time-use and can never be re-used.

You can use the Defender authentication to authenticate users before allowing them to reset or change their passwords, to unlock accounts, or manage Questions and Answers profiles.

Before configuring the settings in this activity, install and configure Defender as described in the Defender documentation.

IMPORTANT: To make Password Manager for AD LDS use the Defender authentication, you must install the Defender Client SDK on the server on which Password Manager Service is installed.

This activity has the following settings:

- Defender Server. Specify the IP address of the computer running the Defender Server.
- **Port number.** Type the port number that the Defender Access Node uses to establish a connection with the Defender Server.
- **Server timeout.** Specify Defender Server time-out (in minutes).
- **Defender shared secret.** Provide the secret that the Defender Access Node will share when it attempts to establish a connection with the Defender Server.

## Authenticate with Starling Two-Factor Authentication

Use this activity to configure Password Manager to use Starling Two-Factor Authentication to authenticate users.

You can use Starling Two-Factor Authentication to authenticate users before allowing them to reset or change their passwords, to unlock accounts, or manage Questions and Answers profiles.

Before using Starling Two-Factor Authentication for authentication, users have to configure it on Starling Two-Factor in **General Settings** tab on the home page of the Administration site. For more information, see [One Identity Starling](#).

For authentication, you have to enter the Starling Two-Factor Authentication OTP that you have received through SMS, phone call or from the Starling 2FA app, or accept the notification received in your phone. To use Starling 2FA app for push notification or to generate OTP, you must install Starling 2FA app on your device and register your phone number.

This activity requires authentication using one of the following options:

- **OTP generated on Starling 2FA app.** Open the Starling 2FA app, click the token and copy the OTP. Enter the OTP in the Starling-Two factor token response field,
- **SMS.** Click **SMS**. Enter the OTP received through SMS in the Starling-Two factor token response field.
- **Phone call.** Click **Phone Call**. Enter the OTP received through phone call in the Starling-Two factor token response field.
- **Push notification.** Click **Push Notification**. Accept the notification received in your phone.

## Authenticate with RADIUS Two-Factor Authentication

Use this activity to configure Password Manager to use a RADIUS server for two-factor authentication.

It uses one-time passwords (OTP) generated by hardware or software tokens for authentication.

You can use RADIUS Two-Factor Authentication to authenticate users before allowing them to reset or change their passwords, to unlock accounts, or manage Questions and Answers profiles.
Before using **RADIUS Two-Factor Authentication** for authentication, users have to configure it in **General Settings** tab on the home page of the Administration site. For more information, see **RADIUS Two-Factor Authentication** on page 157.

**Authenticate via Phone**

Use this activity to include phone-based authentication in a self-service workflow. If your license includes phone-based authentication service, you will be able to configure and use this activity.

If your Password Manager for AD LDS license does not include phone-based authentication service and you want to use this service, please access the Support Portal at [https://support.oneidentity.com/](https://support.oneidentity.com/).

Before enabling phone-based authentication, make sure that users’ phone numbers stored in AD LDS are in a correct format. The phone number must meet the following requirements:

- The number starts with either 00 or + followed by a country code and subscriber’s number. For example, +1 555-789-1314 or 00 1 5554567890.
- The number can have extensions. For example, the number +1 555 123-45-67 ext 890.
- Digits within the number can be separated by a space, hyphen, comma, period, plus and minus signs, slash (/), backward slash (\), asterisk (*), hash (#), and a tab character.
- The number can contain the following brackets: parentheses (), curly braces {}, square brackets [], and angle brackets <> . Only one set of brackets is allowed within the number. The opening bracket must be in the first half of the number. For example, the number +15551234(567) will be considered invalid.

The USA numbers may not start with 00 or + sign, if they comply with all other requirements and contain 11 digits. For example, the number 1-555-123-3245 will be considered valid.

This activity has the following settings:

- **Authentication method.** You can specify whether you want users to receive a call or an SMS with a one-time PIN code by selecting the corresponding option. You can also allow users to choose the authentication method on the Self-Service site by selecting the **Allow users to choose between an automated voice call and SMS** option.

- **SMS template.** Enter the text message that will contain a one-time PIN code and will be sent to users during phone-based authentication.

- **telephoneNumber, homePhone, mobile and other attributes.** Select one or several attributes of a user account from which telephone numbers will be used during phone-based authentication. You can also specify other attributes.

You can test the configured settings by clicking the **Test settings** button and entering the phone number to which a one-time PIN code will be sent.
Authenticate with Passcode

Use this activity to allow users to use passcode for creating or updating Questions and Answers profile. Passcodes are assigned by helpdesk operators to users who have forgotten their passwords and at the same time are not registered with Password Manager for AD LDS or have forgotten their answers to secret questions.

You do not need to configure any settings for this activity.

By default, this authentication activity is used in the I Have a Passcode workflow.

For more information on configuring settings for assigning passcodes, see Assign Passcode on page 119.

Action Activities

This section describes built-in activities that provide core actions of the self-service workflows, such as Reset password, Unlock account, etc.

Edit Q&A Profile

This activity is a core activity of the My Questions and Answers Profile workflow. Use this activity to enable users to create and update their Questions and Answers profiles.

You can also use this activity in the Forgot My Password and Unlock My Account workflows, if you want to force users to update their Q&A profiles after they reset passwords or unlock their accounts. When you use this activity in the Forgot My Password and Unlock My Account workflows, select the Run this activity only if user’s Q&A profile should be updated check box to make users update their Q&A profiles only if the profiles are not compliant with the current requirements.

The activity has the following settings:

- Run this activity only if user’s Q&A profile should be updated. When you use this activity in workflows other than My Questions and Answers Profile, for example, in Forgot My Password and Unlock My Account workflows, select this check box to make users update their Q&A profiles only if the profiles are not compliant with the current Q&A policy.

Reset Password in AD LDS

This is a core activity of the Forgot My Password workflow. The activity allows users to reset passwords in AD LDS instances. If you want to enable users to reset passwords in several systems, configure the Reset password in AD LDS and connected systems activity. For more information on configuring this activity and using One Identity Quick Connect Sync Engine, see Reset Password in AD LDS and Connected Systems on page 98.

In this activity you can configure the Enforce password history option. Password history determines the number of unique new passwords that have to be associated with a user account before an old password can be reused.
Before selecting this option, you should consider the following by-design behavior of Password Manager for AD LDS when that the **Enforce password history** option is enabled:

- Password Manager for AD LDS uses two slots from the password history every time a password is reset. For example, if the password history value defines that users cannot reuse any of the last 10 passwords, then Password Manager checks only the last five passwords. Therefore, it is advised that you double the password history value.
- Having entered a new password that is not policy compliant, users may end up with a randomly generated password they do not know.

The **Use auto generated password** option enables HelpDesk users to generate a new password during password reset process.

The **Use manual password** option enables HelpDesk users to reset the password manually.

### Change Password in AD LDS

This is a core activity of the **Manage My Passwords** workflow. The activity allows users to change passwords in AD LDS instances. If you want to enable users to change passwords in several systems, configure the **Change password in AD LDS and connected systems** activity. For more information on configuring this activity and using One Identity Quick Connect Sync Engine, see Change Password in AD LDS and Connected Systems on page 100.

**Run this activity only when user must change password at next logon** - select this check box when you use this activity in workflows other than Manage My Passwords. By using this option you can force users who are required to change password at next logon to change password while performing other tasks on the Self-Service site.

For example, if you add the **Change password in AD LDS** activity with this option selected to the **My Questions and Answers Profile** workflow, you will force users who are required to change password at next logon to change password when creating or updating their Q&A profiles.

### Reset Password in AD LDS and Connected Systems

Using this activity, you can configure Password Manager for AD LDS to use One Identity Quick Connect to reset passwords in connected systems. If used in conjunction with Quick Connect, Password Manager for AD LDS allows you to enable users and helpdesk operators to manage passwords across a wide variety of connected systems. To be able to integrate Password Manager for AD LDS with Quick Connect, you must have a working knowledge of Quick Connect Sync Engine.

To enable Password Manager for AD LDS to set passwords in connected systems through a Quick Connect server, the account used to access Quick Connect must be a member of the local administrators group on the Quick Connect server.
Before you can configure Password Manager for AD LDS to use a Quick Connect server for cross-platform password synchronization, you must do the following in Quick Connect:

- Create a connection to the AD LDS instances managed by Password Manager for AD LDS.
- Create connections to the systems you want Password Manager for AD LDS to synchronize passwords with.
- Map users from the managed AD LDS instances to users in the connected systems.

For more information on how to configure Quick Connect to set passwords in connected systems, see One Identity Quick Connect documentation.

**To enable Password Manager for cross-platform password synchronization**

1. Include the Reset password in AD LDS and connected systems activity in a workflow and click the activity to edit its settings.
2. In the Quick Connect server name text box specify the IP address or the fully qualified domain name of the Quick Connect server.
3. Select the account to be used to access the Quick Connect server. You can use either Password Manager Service account or specify another account.
   - You can use either pre-Windows 2000 logon name (such as DomainName\UserName) or User Principal Name (such as UserName@DomainName.com) to specify the user name.
4. Specify how you want Password Manager for AD LDS to act when the Quick Connect server is unavailable. To do it, select one of the following and click Next:
   - Act as if no Quick Connect server was specified. Users can manage their passwords only in the AD LDS instances. No warnings are displayed to users if Quick Connect server is not available.
   - Alert users and allow them to reset passwords only in AD LDS. Users are notified that other connected data sources are temporarily unavailable, and are allowed to continue managing their passwords only in the AD LDS instances.
   - Do not allow users to reset passwords. Users cannot perform any password management tasks in AD LDS instances and connected data sources, if the Quick Connect server is not available.
5. From the list of connected systems, select the systems in which you want to manage user passwords. For each selected system, specify the following options and click Next:
   - System alias
   - Reset password in this system independently from AD LDS. Select this option to allow users to reset their passwords in a connected system independently from AD LDS. If you select this option, users will be able to enter different passwords for their accounts in AD LDS and the connected system.
   - Do not allow resetting password in this system independently from AD LDS. Select this option to prevent users from resetting their passwords in
a connected system independently from AD LDS. Note, if you select this option, a user’s password will be reset in the connected system only after the password has been successfully reset in AD LDS. If the user’s password is not reset in AD LDS, it will be not reset in the connected system. Users can specify a different password for the connected system, if you select the **Allow users to specify different password for this system** option.

To enforce password history in AD LDS instances managed by Password Manager, select the **Enforce password history** check box. Password history determines the number of unique new passwords that have to be associated with a user account before an old password can be reused.

**IMPORTANT:** Before selecting this option, you should consider the following by-design behavior of Password Manager for AD LDS when that the **Enforce password history option** is enabled:

Password Manager for AD LDS uses two slots from the password history every time a password is reset. For example, if the password history value defines that users cannot reuse any of the last 10 passwords, then Password Manager for AD LDS checks only the last five passwords. Therefore, it is advised that you double the password history value.

Having entered a new password that is not policy compliant, users may end up with a randomly generated password they don't know.

6. Click **OK** to close the wizard.

**Change Password in AD LDS and Connected Systems**

Using this activity, you can configure Password Manager for AD LDS to use One Identity Quick Connect to reset passwords in connected systems. If used in conjunction with Quick Connect, Password Manager for AD LDS allows you to enable users and helpdesk operators to manage passwords across a wide variety of connected systems. To be able to integrate Password Manager with Quick Connect, you must have a working knowledge of Quick Connect Sync Engine.

To enable Password Manager for AD LDS to set passwords in connected systems through a Quick Connect server, the account used to access Quick Connect must be a member of the local administrators group on the Quick Connect server.

Before you can configure Password Manager for AD LDS to use a Quick Connect server for cross-platform password synchronization, you must do the following in Quick Connect:

- Create a connection to the AD LDS instances managed by Password Manager for AD LDS.
- Create connections to the systems you want Password Manager for AD LDS to synchronize passwords with.
- Map users from the managed AD LDS instances to users in the connected systems.

For more information on how to configure Quick Connect to set passwords in connected systems, see One Identity Quick Connect documentation.
To enable Password Manager for cross-platform password synchronization

1. Include the Change password AD LDS and connected systems activity in a workflow and click the activity to edit its settings.

2. In the Quick Connect server name text box specify the IP address or the fully qualified domain name of the Quick Connect server.

3. Select the account to be used to access the Quick Connect server. You can use either Password Manager Service account or specify another account.

   You can use either pre-Windows 2000 logon name (such as DomainName\UserName) or User Principal Name (such as UserName@DomainName.com) to specify the user name.

4. Specify how you want Password Manager for AD LDS to act when the Quick Connect server is unavailable. To do it, select one of the following and click Next:
   - Act as if no Quick Connect server were specified. Users can manage their passwords only in AD LDS instances. No warnings are displayed to users if Quick Connect server is not available.
   - Alert users and allow them to change passwords only in AD LDS. Users are notified that other connected data sources are temporarily unavailable, and are allowed to continue managing their passwords only in AD LDS instances.
   - Do not allow users to change passwords. Users cannot perform any password management tasks in AD LDS instances and connected data sources, if the Quick Connect server is not available.

5. From the list of connected systems, select the systems in which you want to manage user passwords. For each selected system, specify the following options and click OK:
   - System alias
   - Change password in this system independently from AD LDS. Select this option to allow users to change their passwords in a connected system independently from AD LDS. If you select this option, users will be able to enter different passwords for their accounts in AD LDS and the connected system.
   - Do not allow changing password in this system independently AD LDS. Select this option to prevent users from changing their passwords in a connected system independently from AD LDS. Note, if you select this option, a user’s password will be changed in the connected system only after the password has been successfully changed in AD LDS. If the user’ password is not changed in AD LDS, it will be not changed in the connected system. Users can specify different password for the connected system, if you select the Allow users to specify different password for this system option.
Unlock Account

This activity is a core activity of the Unlock My Account workflow. It allows users to unlock their accounts using the Self-Service site.

You do not need to configure any settings for this activity.

Enable Account

Use this activity to enable users’ disabled accounts. You can use the activity in different workflows. It is recommended to place this activity after authentication activities in a workflow.

For example, to enable users with disabled accounts to reset passwords and enable their accounts, you can use the Enable account activity in the Forgot My Password workflow:

1. Authenticate with Q&A profile (random questions).
2. Enable account.
3. Reset password in AD LDS.
4. Restart workflow if error occurs.
5. Email user if workflow succeeds.
6. Email user if workflow fails.

Force User to Change Password at Next Logon

Use this activity when users want to change their passwords during the next logon.

For example, you can use this activity in the Reset Password workflow and can force users to change passwords at the next logon once the password has been reset by a helpdesk operator.

To allow users to change password at the next logon, the helpdesk operator must select Helpdesk operators can choose whether to force users to change password at next logon check box available in the Force user to change password at next logon activity.

It is recommended to place this activity after the Reset Password in AD LDS activity in a workflow.

Subscribe to Notifications

This activity is a core activity of the My Notifications workflow. It allows users to select on the Self-Service site the events they want to be notified about, such as when their password is changed or account is unlocked.

The event list available on the Self-Service site depends on the settings you configure in the user notification activities included in the self-service workflows. Each user notification activity (Email user if workflow succeeds and Email user if workflow fails) has the
settings that allow you to subscribe users to this notification or to allow users to choose whether they want to receive this notification or not.

If user notifications activities are not included in a workflow, users will not receive any email notifications about this workflow.

A notification text depends on the workflow in which the notification activity is used. For example, if the Email user if workflow succeeds activity is used in the Forgot My Password workflow, after successfully performing this task on the Self-Service site the user will be notified that his password has been reset. By default, the Email user if workflow succeeds and Email user if workflow fails activities are included in each built-in self-service workflow and offer notification templates.

Note, that notification templates are available for built-in activities and built-in workflows only.

For more information on configuring user notification activities, see Notification Activities on page 104.

**IMPORTANT:** If a user notification activity is included in a helpdesk workflow, the user will receive the corresponding notification. You cannot change user subscription settings of notifications about helpdesk workflows.

### Lock Q&A Profile

If you want to lock the user’s Questions and Answers profile after several failed authentication attempts, place the Lock Q&A profile activity before the Restart workflow if error occurs activity in a workflow. The Lock Q&A profile activity locks the profile when the total number of attempts to authenticate the user by using any of the following activities equals or exceeds the lockout threshold value:

- Authenticate with Q&A profile
- Authenticate via phone
- Authenticate with passcode

By default, the Lock Q&A profile activity is included in the Forgot My Password and Unlock My Account workflows.

**IMPORTANT:**

- If the user’s Q&A profile gets locked, all tasks on the Self-Service site will be unavailable for the user. In this case, the user must contact help desk to obtain a passcode and unlock the Q&A profile.
- If an unregistered user is registering for the first time and tries to enter a wrong password beyond the specified limit, the profile shall be locked out. The user has to wait for the duration configured for Reset lockout Account.

This activity has the following settings:

- **Lockout duration.** Specify the number of minutes the profile remains locked out before automatically becoming unlocked.
- **Lockout threshold.** Specify the number of failed authentication attempts that will cause the profile to be locked out.

- **Reset account lockout counter after.** Specify the number of minutes that must elapse from the time a user fails to authenticate before the failed authentication attempt counter is reset to 0 bad authentication attempts.

**Display User Agreement**

Depending on the legislation requirements, organizations may be required to explicitly obtain users’ consent to store their personal information which is available in Questions and Answers profile.

You can use this activity to have the Self-Service site ask users to agree that Password Manager for AD LDS will store their personal information.

For example, you can use this activity in the *My Questions and Answers Profile* workflow; it is recommended to place the activity after authentication activities and before the *Edit Q&A profile* activity.

**To configure the Display user agreement activity**

1. Open the Display user agreement activity included in the workflow.
2. Edit the agreement text in the default language as required. When editing the agreement text, you can use the parameters available in the editor, for example `#USER_ACCOUNT_NAME#` and others.
3. To edit the agreement text in the available additional languages, click the language link in the *Additional languages* list. By default, the agreement text template is available in 16 languages.
4. Click the *Add new language* link to select more languages for the agreement text.
5. Click **OK**.

**Restart Workflow if Error Occurs**

This activity is performed when an error occurs during workflow execution. In this case, the activity reruns any self-service workflow from the very beginning. If a critical error occurs (user’s account or Q&A profile gets locked, for example), then the **Restart workflow if error occurs** activity is skipped and the workflow stops.

It is recommended to place this activity before notifications activity in a workflow.

You do not need to configure this activity.

**Notification Activities**

All built-in notifications can be of two types: user notifications and administrator notifications. Each notification type is divided into success and failure notifications. So, for each workflow four notification activities are available:
- Email user if workflow succeeds
- Email user if workflow fails
- Email administrator if workflow succeeds
- Email administrator if workflow fails

**IMPORTANT:** Before configuring notifications, ensure that you have configured the outgoing mail servers. To specify the SMTP server settings, use the procedure outlined in *Outgoing Mail Servers* on page 137.

## Customizing Notifications

By default, **Email user if workflow succeeds** and **Email user if workflow fails** activities are included in every self-service and helpdesk workflow. These activities contain predefined notification templates that correspond to a workflow. For example, user notification activities in the **Forgot My Password** workflow offer templates about successful/failed password reset.

The notification templates are available in 17 languages: Chinese (Simplified), Chinese (Traditional), Czech, Danish, Dutch, English, French, German, Italian, Japanese, Korean, Polish, Portuguese (Brazil), Portuguese (Portugal), Russian, Spanish, Swedish.

By default, for each user notification activity included in the default workflow configuration 17 languages are available: English as the default language and the others as additional languages. You can also select more languages by clicking the **Add new language** link in the notification activity dialog box.

The language of notification corresponds to the language of a user’s Q&A profile. If the Q&A profile is configured in a language that is not included in the list of languages available for Password Manager email notifications, the user will receive the notification in the default language.

**NOTE:** Predefined notification templates in 17 languages are available for user notifications only (**Email user if workflow succeeds** and **Email user if workflow fails** activities).

You can customize email notification messages distributed by Password Manager for AD LDS to meet specific requirements in your organization.

The following table describes parameters that you can use in email notifications:

### Table 9: Email notification parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>#PRODUCT_NAME_ FULL#</td>
<td>Full name of the software product. The parameter value is a constant.</td>
<td>One Identity Password Manager for AD LDS</td>
</tr>
<tr>
<td>#PRODUCT_NAME_</td>
<td>Short name of the software product</td>
<td>Password Manager for AD LDS</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
<td>Examples</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------</td>
<td>----------</td>
</tr>
<tr>
<td>SHORT#</td>
<td>software product. The parameter value is a constant.</td>
<td></td>
</tr>
<tr>
<td>#COMPANY_NAME_FULL#</td>
<td>Full name of the company. The parameter value is a constant.</td>
<td>One Identity LLC</td>
</tr>
<tr>
<td>#COMPANY_NAME_SHORT#</td>
<td>Short name of the company. The parameter value is a constant.</td>
<td>One Identity</td>
</tr>
<tr>
<td>#PRODUCT_NAME_SHORT_CUSTOM#</td>
<td>Short name of the software product. The parameter value can be set manually by the user.</td>
<td>Password Manager for AD LDS Custom</td>
</tr>
<tr>
<td>#USER_ACCOUNT_NAME#</td>
<td>User’s CN.</td>
<td>CN=JSmith</td>
</tr>
<tr>
<td>#USER_DISPLAY_NAME#</td>
<td>User’s display name.</td>
<td>John Smith</td>
</tr>
<tr>
<td>#USER_FIRST_NAME#</td>
<td>User's first name.</td>
<td>john</td>
</tr>
<tr>
<td>#USER_LAST_NAME#</td>
<td>User's last name</td>
<td>Smith</td>
</tr>
<tr>
<td>#USER_UPN_NAME#</td>
<td>User Principle name is the name of a system user in an e-mail address format.</td>
<td><a href="mailto:JSmith@corp.contoso.com">JSmith@corp.contoso.com</a></td>
</tr>
<tr>
<td>#MACHINE_HOST_NAME#</td>
<td>A hostname is the label (the name) assigned to a device (a host) on a network and is used to distinguish one device from another on a specific network or over the Internet.</td>
<td>MachineHostName.corp.contoso.com</td>
</tr>
<tr>
<td>#WINDOWS_LOGON_NAME#</td>
<td>Login name for wWindows.</td>
<td>corp\JSmith</td>
</tr>
<tr>
<td>#OPERATOR_IP#</td>
<td>Helpdesk operator’s IP address.</td>
<td>172.16.254.1</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
<td>Examples</td>
</tr>
<tr>
<td>---------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------</td>
</tr>
<tr>
<td>#WORKFLOW_NAME#</td>
<td>Name of the workflow that was executed. All workflow names are available on the Administration site.</td>
<td>Forgot My Password</td>
</tr>
<tr>
<td>#WORKFLOW_RESULT#</td>
<td>Result of a workflow execution displayed on the status page of the Self-Service site.</td>
<td>Your password was successfully changed.</td>
</tr>
<tr>
<td>#WORKFLOW_SUMMARY#</td>
<td>Text displayed in the details pane on the status page of the Self-Service site.</td>
<td>Notification was sent to your email.</td>
</tr>
</tbody>
</table>

The notifications are sent either in plain text or as HTML.

**To configure user email notifications**

1. Open the user notification activity included in the workflow.
2. Edit the subject and body of the notification template in the default language as required. When editing the notification template, you can use the parameters available in the notification editor, for example #USER_ACCOUNT_NAME#, #WORKFLOW_RESULT#, and others.
3. To edit the notification message template in the available additional languages, click the language link in the **Additional languages** list.
4. Click the **Add new language** link to select more languages for the notification message.
5. In the **Message format** box, select the format to use for the notifications. You can select from two options: either **HTML** or **Plain text**.
6. In the **User notification settings**, select one of the following:
   - Subscribe users to this notification. Allow users to unsubscribe.
   - Subscribe users to this notification. Do not allow users to unsubscribe.
   - Do not subscribe users to this notification. Allow users to subscribe to this notification.
7. Verify the changes you have made by sending a test message. Click the **Test notification settings** button and enter an email address for a test email notification and select the notification language.
8. Click **OK**.
Email User if Workflow Succeeds

You can use this activity in any self-service workflow to notify users about a successfully performed workflow. For example, to notify a user that his account has been unlocked, use this activity in the Unlock My Account workflow.

Email User if Workflow Fails

You can use this activity in any helpdesk workflow to notify users about errors occurred in a workflow. For example, to notify a user an error occurred when a helpdesk operator attempted to reset password, use this activity in the Reset Password workflow.

Email Administrator if Workflow Succeeds

You can use this activity in any self-service workflow to notify an administrator about a successfully performed workflow. For example, to notify the administrator that a specific user has successfully unlocked the account, use this activity in the Unlock My Account workflow.

In the Administrator’s email address text box, specify the e-mail address of the administrator you want to receive notifications.

Email Administrator if Workflow Fails

You can use this activity in any self-service workflow to notify an administrator about errors occurred in a workflow. For example, to notify the administrator that errors occurred when a user tried to reset password, use this activity in the Forgot My Password workflow.

In the Administrator’s email address text box, specify the e-mail address of the administrator you want to receive notifications.

Helpdesk Workflows

By configuring the helpdesk workflows you can specify what tasks will be available to helpdesk operators on the Helpdesk site, and configure options for each available task. You can also create custom activities and custom workflows. For more information, see Custom Workflows on page 80 and Custom Activities on page 82.

The following helpdesk built-in workflows are available:

- Verify User Identity
- Assign Passcode
The helpdesk workflows correspond to the tasks on the Helpdesk site. If you enable a helpdesk workflow, the corresponding task will be available to operators on the Helpdesk site.

**Verify User Identity**

You can use this workflow to configure the **Verify User Identity** task for the Helpdesk site. A helpdesk operator should verify user identity before performing any password management task.

The default configuration of this workflow is the following:

1. Authentication Methods.
2. Restart workflow if error occurs.
3. Email user if workflow succeeds.
4. Email user if workflow fails.

**Assign Passcode**

You can use this workflow to configure the **Assign Passcode** task for the Helpdesk site. By using this task helpdesk operators can assign temporary passcodes to users who have forgotten their passwords and are not registered with Password Manager for AD LDS or have forgotten their answers to secret questions.

The default configuration of this workflow is the following:

1. Assign passcode.
2. Unlock Q&A profile.
3. Restart workflow if error occurs.
4. Email user if workflow succeeds.
5. Email user if workflow fails.

**Reset Password**

You can use this workflow to configure the **Reset Password** task for the Helpdesk site. Helpdesk operators use this task to reset user passwords in managed AD LDS instances.
and other connected data sources, if applicable.
The default configuration of this workflow is the following:

1. Authentication Methods.
2. Reset password in AD LDS.
3. Restart workflow if error occurs.
4. Email user if workflow succeeds.
5. Email user if workflow fails.

**Unlock Account**

You can use this workflow to configure the Unlock Account task for the Helpdesk site.
The default configuration of this workflow is the following:

1. Authentication Methods.
2. Unlock account.
3. Restart workflow if error occurs.
4. Email user if workflow succeeds.
5. Email user if workflow fails.

**Unlock Profile**

You can use this workflow to configure the Unlock Profile task for the Helpdesk site. By using this task, helpdesk operators can unlock user's profiles that are locked out as a result of a sequence of failed attempts to provide the correct answers to secret questions.
The default configuration of this workflow is the following:

1. Unlock profile.
2. Restart workflow if error occurs.
3. Email user if workflow succeeds.
4. Email user if workflow fails.

**Enforce Update of Profile**

You can use this workflow to configure the Enforce Update of Profile task for the Helpdesk site. Helpdesk operators can perform this task to require users to update their Q&A profiles so that the profiles meet requirements of the current Q&A policy.
The default configuration of this workflow is the following:
1. Enforce update of profile.
2. Restart workflow if error occurs.
3. Email user if workflow succeeds.
4. Email user if workflow fails.

**Overview of Built-in Helpdesk Activities**

All built-in activities available in the helpdesk workflows fall into the following categories: authentication, actions and notifications.

Authentication activities are a group of activities that provide different authentication options, for example authentication with Questions and Answers profiles, or phone-based authentication.

The actions category includes activities that are core components of the helpdesk workflows, for example Unlock Account, Assign Passcode, and other activities.

Notification activities are activities that you can use to configure email notifications for users and administrators, and specify conditions under which the notifications should be sent.

The following sections describe the helpdesk activities and provide information about the settings specific to each activity.

**Authentication Activities**

This section describes workflow activities that provide different authentication options.

**Authentication Methods**

Use this activity to select which authentication methods to display in the User site. The three types of authentication methods available to select for the administrator are as follows:

- Security Questions
- Corporate Authentication
- Personal Email

**IMPORTANT:** The administrator can select any one of the activities selected in the registration method, to make it default mode for authentication for the users on the User site. Select one of the settings radio buttons from the right side to make it default authentication method.
NOTE: When the administrator selects registration method(s), only the respective authentication methods are visible to the administrator in Authentication methods. See Register

Security Questions

Use this activity to authenticate a user with the personal Questions and Answers profile. In this activity, the administrator can specify how many questions from the Questions and Answers profile the user must answer for authentication.

- **Authenticate with Q&A Profile**: See Authenticate with Q&A Profile

Corporate Authentication

Use this activity to authenticate a user with a mobile device. There are three methods to authenticate the users using a mobile device.

- **Authenticate with Starling Two-Factor Authentication**: See Authenticate with Starling Two-Factor Authentication.
- **Authenticate with RADIUS Two-Factor Authentication**: See Authenticate with RADIUS Two-Factor Authentication
- **Authenticate via Phone**: See Use this activity to include phone-based authentication in a self-service workflow. If your license includes phone-based authentication service, you will be able to configure and use this activity.

Personal Email

**Authenticate via Passcode**: Use this activity to authenticate the users with a passcode. The administrator can configure passcode length and expiry time limit for the passcode.

Authenticate with Q&A Profile

Use this activity to authenticate a user with a personal Questions and Answers profile. In this activity you can specify mandatory and helpdesk questions from user’s Q&A profile that a user must answer to be authenticated.

**IMPORTANT**: If the questions you selected in this activity are not found in the user’s Q&A profile, the user will not be authenticated and the workflow containing this activity will not be performed for this user.

You can select one of the following authentication methods:

- **Answers to the specified questions (user’s answer is shown)**. In this mode, a helpdesk operator will ask a user for complete answers to the specified questions, and then compare them to the answers displayed on the identity verification page.
**IMPORTANT:** This option cannot be used if user answers to mandatory questions are not stored using reversible encryption. To store answers using reversible encryption, select the corresponding option in the Q&A profile settings. For more information, see Configuring Q&A Profile Settings on page 76.

- **Answers to the specified questions (user’s answer not shown).** In this mode, a helpdesk operator will ask a user for complete answers to the specified questions, and enter the answers on the identity verification page.

- **Random characters of answers to the specified questions.** In this mode, a helpdesk operator will ask a user to tell the specified number of characters in the user’s answer to a specified question, and then type in those characters in the appropriate positions on the identity verification page.

**Authenticate via Phone**

Use this activity to include phone-based authentication in a helpdesk workflow. If your license includes phone-based authentication service, you will be able to configure and use this activity.

If your license does not include phone-based authentication service and you want to use this service, you can access the Support Portal at https://support.oneidentity.com/.

Before enabling phone-based authentication, make sure that users’ phone numbers stored in AD LDS are in a correct format. The phone number must meet the following requirements:

- The number starts with either 00 or + followed by a country code and subscriber’s number. For example, +1 555-789-1314 or 00 1 5554567890.

- The number can have extensions. For example, the number +1 555 123-45-67 ext 890.

- Digits within the number can be separated by a space, hyphen, comma, period, plus and minus signs, slash (/), backward slash (\), asterisk (*), hash (#), and a tab character.

- The number can contain the following brackets: parentheses (), curly braces {}, square brackets [], and angle brackets <>. Only one set of brackets is allowed within the number. The opening bracket must be in the first half of the number. For example, the number +1555123(4567) will be considered invalid.

The USA numbers may not start with 00 or + sign, if they comply with all other requirements and contain 11 digits. For example, the number 1-555-123-3245 will be considered valid.

This activity has the following settings:

- **Authentication method.** You can specify whether you want users to receive a call or an SMS with a one-time PIN code by selecting a corresponding option. You can also allow helpdesk operators to offer users to choose the authentication method by selecting the Allow users to choose between an automated voice call and
SMS option.

- **SMS template.** Enter the text message that will contain a one-time PIN code and will be sent to users during phone authentication.
- **telephoneNumber, homePhone, mobile** and other attributes. Select one or several attributes of a user account from which telephone numbers will be used during phone-based authentication. You can also specify other attributes.

You can test the configured settings by clicking the **Test settings** button and entering the phone number to which a one-time PIN code will be sent.

## Authenticate with Defender

1. IMPORTANT:
   - Authenticating with Defender is an activity not supported with the current release of Password Manager ADLDS.
   - Change or Reset password in Active Directory and connected systems is not supported in ADLDS.

You can use this activity to configure Password Manager for AD LDS to use Defender to authenticate users.

Defender is a two-factor authentication solution that authenticates users without forcing them to remember another new password. Defender uses one-time passwords (OTP) generated by special hardware or software tokens. Even if an attacker captures the password, there will be no security violation, since the password is valid only for one-time-use and can never be re-used.

You can use the Defender authentication to authenticate users before resetting their passwords or unlocking their Q&A profiles.

Before configuring the settings in this activity, install and configure Defender as described in the Defender documentation.

1. IMPORTANT: To make Password Manager for AD LDS use the Defender authentication, you must install the Defender Client SDK on the server on which Password Manager Service is installed.

This activity has the following settings:

- **Defender Server (IP address or DNS name).** Specify Defender Server IP address or DNS name.
- **Port number.** Type the port number that the Defender Access Node uses to establish a connection with the Defender Server.
- **Server timeout.** Specify Defender Server time-out (in minutes).
- **Defender shared secret.** Provide the secret that the Defender Access Node will share when it attempts to establish a connection with the Defender Server.
Authenticate with Starling Two-Factor Authentication

Use this activity to configure Password Manager to use Starling Two-Factor Authentication to authenticate users.

You can use Starling Two-Factor Authentication to authenticate users before allowing them to reset or change their passwords, to unlock accounts, or manage Questions and Answers profiles.

Before using Starling Two-Factor Authentication for authentication, users have to configure it on One Identity Starling in General Settings tab on the home page of the Administration site. See One Identity Starling.

For authentication, you have to enter the Starling Two-Factor Authentication OTP that you have received through SMS, phone call or from the Starling 2FA app, or accept the notification received in your phone. To use Starling 2FA app for push notification or to generate OTP, you must install Starling 2FA app on your device and register your phone number.

This activity requires authentication using one of the following options:

- **OTP generated on Starling 2FA app.** Open the Starling 2FA app, click the token and copy the OTP. Enter the OTP in the Starling-Two factor token response field.
- **SMS.** Click SMS. Enter the OTP received through SMS in the Starling-Two factor token response field.
- **Phone call.** Click Phone Call. Enter the OTP received through phone call in the Starling-Two factor token response field.
- **Push notification.** Click Push Notification. Accept the notification received in your phone.

Authenticate with RADIUS Two-Factor Authentication

Use this activity to configure Password Manager to use a RADIUS server for two-factor authentication.

It uses one-time passwords (OTP) generated by hardware or software tokens for authentication.

You can use RADIUS Two-Factor Authentication to authenticate users before allowing them to reset or change their passwords, to unlock accounts, or manage Questions and Answers profiles.

Before using RADIUS Two-Factor Authentication for authentication, users have to configure it in General Settings tab on the home page of the Administration site. For more information, see RADIUS Two-Factor Authentication on page 157.

Action Activities

This section describes activities that provide core actions of the helpdesk workflows, such as Reset password in AD LDS, Unlock account, etc.
Reset Password in AD LDS

This is a core activity of the **Reset Password** workflow. The activity allows helpdesk operators to reset user passwords in AD LDS instances only. If you want to enable helpdesk operators to reset passwords in several systems, configure the **Reset password in AD LDS and connected systems** activity. For more information on configuring this activity and using One Identity Quick Connect Sync Engine, see [Reset Password in AD LDS and Connected Systems](#) on page 116.

In this activity you can configure the **Enforce password history** option. Password history determines the number of unique new passwords that have to be associated with a user account before an old password can be reused.

Before selecting this option, you should consider the following by-design behavior of Password Manager for AD LDS when that the **Enforce password history option** is enabled:

- Password Manager for AD LDS uses two slots from the password history every time a password is reset. For example, if the password history value defines that users cannot reuse any of the last 10 passwords, then Password Manager for AD LDS checks only the last five passwords. Therefore, it is advised that you double the password history value.
- Having entered a new password that is not policy compliant, users may end up with a randomly generated password they don’t know.

Reset Password in AD LDS and Connected Systems

Using this activity, you can configure Password Manager for AD LDS to use One Identity Quick Connect to reset passwords in connected systems. If used in conjunction with Quick Connect, Password Manager for AD LDS allows you to enable users and helpdesk operators to manage passwords across a wide variety of connected systems. To be able to integrate Password Manager with Quick Connect, you must have a working knowledge of Quick Connect Sync Engine.

To enable Password Manager for AD LDS to set passwords in connected systems through a Quick Connect server, the account used to access Quick Connect must be a member of the local administrators group on the Quick Connect server.

Before you can configure Password Manager for AD LDS to use a Quick Connect server for cross-platform password synchronization, you must do the following in Quick Connect:

- Create a connection to the AD LDS instances managed by Password Manager for AD LDS.
- Create connections to the systems you want Password Manager for AD LDS to synchronize passwords with.
- Map users from the managed AD LDS instances to users in the connected systems.

For more information on how to configure Quick Connect to set passwords in connected systems, see One Identity Quick Connect documentation.
To enable Password Manager for cross-platform password synchronization

1. Include the **Reset password in AD LDS and connected systems** activity in a workflow and click the activity to edit its settings.

2. In the **Quick Connect server name** text box specify the IP address or the fully qualified domain name of the Quick Connect server.

3. Select the account to be used to access the Quick Connect server. You can use either Password Manager Service account or specify another account.

   You can use either pre-Windows 2000 logon name (such as DomainName\UserName) or User Principal Name (such as UserName@DomainName.com) to specify the user name.

4. Specify how you want Password Manager for AD LDS to act when the Quick Connect server is unavailable. To do it, select one of the following and click **Next**:

   - **Act as if no Quick Connect server was specified**. Helpdesk operators can manage users’ passwords only in AD LDS instances. No warnings are displayed if Quick Connect server is not available.

   - **Alert users and allow them to reset passwords only in AD LDS.** Helpdesk operators are notified that other connected data sources are temporarily unavailable, and are allowed to continue managing users’ passwords only in AD LDS instances.

   - **Do not allow users to reset passwords.** Helpdesk operators cannot perform any password management tasks in AD LDS instances and connected data sources, if the Quick Connect server is not available.

5. From the list of connected systems, select the systems in which you want to manage user passwords. For each selected system, specify the following options and click **Next**:

   - **System alias**

   - **Reset password in this system independently from AD LDS.** Select this option to allow helpdesk operators to reset users’ passwords in a connected system independently from AD LDS. If you select this option, helpdesk operators will be able to enter different passwords for users’ accounts in AD LDS and the connected system.

   - **Do not allow resetting password in this system independently from AD LDS.** Select this option to prevent helpdesk operators from resetting users’ passwords in a connected system independently from AD LDS. Note, if you select this option, a user’s password will be reset in the connected system only after the password has been successfully reset in AD LDS. If the user’ password is not reset in AD LDS, it will be not reset in the connected system. Helpdesk operators can specify a different password for the connected system, if you select the **Allow specifying different password for this system** option.

6. To enforce password history in the AD LDS instances managed by Password Manager for AD LDS, select the **Enforce password history** check box. Password history determines the number of unique new passwords that have to be associated with a user account before an old password can be reused.
IMPORTANT: Before selecting this option, you should consider the following by-design behavior of Password Manager for AD LDS when that the Enforce password history option is enabled:

- Password Manager for AD LDS uses two slots from the password history every time a password is reset. For example, if the password history value defines that users cannot reuse any of the last 10 passwords, then Password Manager for AD LDS checks only the last five passwords. Therefore, it is advised that you double the password history value.
- Having entered a new password that is not policy compliant, users may end up with a randomly generated password they don’t know.

7. Click OK to close the wizard.

Unlock Account

This activity is a core activity of the Unlock Account workflow. It allows helpdesk operators to unlock users’ accounts using the Helpdesk site.

You do not need to configure any settings for this activity.

Enable Account

Use this activity to enable users’ disabled accounts. You can use the activity in different workflows. It is recommended to place this activity after authentication activities in a workflow.

For example, to enable users with disabled accounts to reset passwords and enable their accounts, you can use the Enable Account activity in the Forgot My Password workflow:

1. Authenticate user with Q&A profile.
2. Enable account.
3. Reset password in AD LDS.
4. Restart workflow if error occurs.
5. Email user if workflow succeeds.
6. Email user if workflow fails.

Force User to Change Password at Next Logon

Use this activity when users want to change their passwords during the next logon.

For example, you can use this activity in the Reset Password workflow and can force users to change passwords at the next logon once the password has been reset by a helpdesk operator.
To allow users to change password at the next logon, the helpdesk operator must select **Helpdesk operators can choose whether to force users to change password at next logon** check box available in the **Force user to change password at next logon** activity.

It is recommended to place this activity after the **Reset Password** in AD LDS activity in a workflow.

### Assign Passcode

This activity is a core activity of the **Assign Passcode** workflow. It allows helpdesk operators to assign a passcode to the user who has forgotten password and is not yet registered with Password Manager for AD LDS or has forgotten answers to secret questions. This activity has the following settings:

- **Passcode length.** Specify how many characters a passcode must contain.
- **Passcode lifetime.** Specify how long a passcode issued by helpdesk operators is valid.

### Unlock Q&A Profile

This activity is a core activity of the **Unlock Q&A Profile** workflow. It allows helpdesk operators to unlock users’ Questions and Answers profiles using the Helpdesk site.

You do not need to configure any settings for this activity.

### Enforce Update of Q&A Profile

This activity is a core activity of the **Enforce Update of Q&A Profile** workflow. It allows helpdesk operators to immediately enforce update of users’ Q&A profiles if the profiles are not compliant with the current Questions and Answers policy.

### Restart Workflow if Error Occurs

This activity is performed when an error occurs during workflow execution. In this case, the activity reruns any helpdesk workflow from the very beginning. If a critical error occurs, for example, user’s account or Q&A profile gets locked, then the **Restart workflow if error occurs** activity is skipped and the workflow stops.

It is recommended to place this activity before notification activities in a workflow.

You do not need to configure any settings for this activity.
Notification Activities

All built-in notifications are divided into two groups: user notifications and administrator notifications. Each notification group is further subdivided into success and failure notifications. So, for each workflow four notification activities are available: Email user if workflow succeeds, Email user if workflow fails, Email administrator if workflow succeeds, Email administrator if workflow fails. By using these activities you can configure email notifications that will be sent to users and specified administrators when workflows are completed successfully or fail.

IMPORTANT: Before configuring notifications, ensure that you have configured the outgoing mail servers. To specify the SMTP server settings, use the procedure outlined in Outgoing Mail Servers on page 137.

Customizing Notifications

By default, email user if workflow succeeds and email user if workflow fails activities are included in every self-service and helpdesk workflow. These activities contain predefined notification templates that correspond to a workflow. For example, user notification activities in the Reset Password workflow offer templates about successful/failed password reset.

The notification templates are available in 17 languages: Chinese (Simplified), Chinese (Traditional), Czech, Danish, Dutch, English, French, German, Italian, Japanese, Korean, Polish, Portuguese (Brazil), Portuguese (Portugal), Russian, Spanish, Swedish.

By default, for each user notification activity included in the default workflow configuration 17 languages are available: English as the default language and the others as additional languages. You can also select more additional languages by clicking the Add new language link in the notification activity dialog box.

The language of notification corresponds to the language of a user’s Q&A profile. If the Q&A profile is configured in a language that is not included in the list of languages available for Password Manager email notifications, the user will receive the notification in the default language.

NOTE: Predefined notification templates in 17 languages are available for user notification activities only (email user if workflow succeeds and email user if workflow fails activities).

You can customize email notification messages distributed by Password Manager for AD LDS to meet specific requirements in your organization. The notifications are sent either in plain text or as HTML.

To modify user email notifications

1. Open the user notification activity included in the workflow.
2. Select either to customize the e-mail template or use from general settings section.
   If you choose to select Use email template from general settings section, the
user receives email in default template from general setting section.

3. To customize, edit the subject and body of the notification template in the default language as required. When editing the notification template, you can use the parameters available in the notification editor, for example #USER_ACCOUNT_NAME#, #WORKFLOW_RESULT#, and others.

4. To edit the notification message template in the available additional languages, click the language link in the Additional languages list.

5. Click the Add new language link to select more languages for the notification message.

6. In the Message format box, select the format to use for the notifications. You can select from two options: either HTML or Plain Text.

7. Verify the changes you have made by sending a test message. Click the Test notification settings button and enter the email address for a test email notification and select the notification language.

8. Click Save.

Email User if Workflow Succeeds

You can use this activity in any helpdesk workflow to notify users about a successfully performed workflow. For example, to notify a user that the Q&A profile has been unlocked, use this activity in the Unlock Q&A Profile workflow.

Email User if Workflow Fails

You can use this activity in any helpdesk workflow to notify users about errors occurred in a workflow. For example, to notify a user an error occurred when a helpdesk operator attempted to reset password, use this activity in the Reset Password workflow.

Email Administrator if Workflow Succeeds

You can use this activity in any helpdesk workflow to notify an administrator about a successfully performed workflow. For example, to notify the administrator that a helpdesk operator has successfully unlocked user’s Q&A profile, use this activity in the Unlock Q&A Profile workflow.

In the Administrator’s email address text box, specify the e-mail address of the administrator you want to receive notifications.

Email Administrator if Workflow Fails

You can use this activity in any helpdesk workflow to notify an administrator about errors occurred in a workflow. For example, to notify the administrator that errors occurred when a helpdesk operator attempted to reset user’s password, use this activity in the Reset Password workflow.
In the Administrator’s email address text box, specify the e-mail address of the administrator you want to receive notifications.

User Enforcement Rules

User enforcement rules allow you to force users to create and update their Q&A profiles and notify users about password expiration. Password Manager for AD LDS offers three user enforcement rules: Invite users to create/update Q&A profiles, Remind users to create/update Q&A profiles, and Remind users to change password.

Invite Users to Create/Update Profiles

By using this user enforcement rule you can configure Password Manager for AD LDS to invite users to register with Password Manager for AD LDS or update their Questions and Answers profiles. If you configure this enforcement rule, users will be notified by email.

The notification schedule is defined by the Invitation to Create/Update Profile scheduled task. Note that notification starts only after this scheduled task has run. For more information on the scheduled tasks, see Invitation to Create/Update Profile Task on page 140.

IMPORTANT: If you disable the Invitation to Create/Update Q&A Profile scheduled task, users will not be enforced to create or update their profiles.

This enforcement rule is disabled by default. To enable the rule, on the Home page of the Administration site, expand the required enforcement rules section, click Invite Users to Create/Update Q&A Profiles, and then click Enable.

To configure this enforcement rule, you must specify a user scope, conditions when an email notification should be sent and an email notification text.

To configure this enforcement rule

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAadminADLDS/.

   NOTE: When prompted to log in, provide your domain user name in a domain-name\username format.

2. Select the Management Policy you want to modify.

3. Expand the Enforcement Rules section and click Invite Users to Create/Update Profiles.

4. To set the user scope of this rule, click Configure under Configure the rule’s scope, specify the following settings and click Save:
Table 10: Configure scope of rule

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users from the user scope of the Management Policy</td>
<td>Select this option to include all users from the Management Policy user scope to the enforcement rule scope.</td>
</tr>
<tr>
<td>The following users</td>
<td>Select this option to specify groups included to and excluded from the enforcement rule scope.</td>
</tr>
<tr>
<td>Users included both in the Management Policy user scope and the following groups</td>
<td>Specify groups included in the enforcement rule scope. Note, that only users belonging both to the Management Policy user scope and the specified groups will be included in the enforcement rule scope. To browse for groups, click Add, select the required groups and click Save.</td>
</tr>
<tr>
<td>Users excluded from the rule’s scope</td>
<td>Specify groups excluded from the enforcement rule scope. To browse for groups, click Add, select the required groups and click Save.</td>
</tr>
</tbody>
</table>

5. To specify the conditions under which users should be notified to create or update their Q&A profiles, click Configure under Notify users who meet the following condition, select one or more of the following options and click OK:

Table 11: User notifications

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User is not registered with Password Manager</td>
<td>Select to force users to register with Password Manager for AD LDS by creating Q&amp;A profiles, if users are not registered with Password Manager for AD LDS.</td>
</tr>
<tr>
<td>The question user answered to register was modified or deleted</td>
<td>Select to have users update their Q&amp;A profiles if one or more questions which users answered to register were modified or deleted.</td>
</tr>
<tr>
<td>User’s Q&amp;A profile contains fewer questions than required for registration</td>
<td>Select to have users update their Q&amp;A profiles if you have added one or more questions required for registration, thus making the list of such questions longer than it was before users’ profiles were last updated.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>User's answers are shorter than required</td>
<td>Select to have users update their Q&amp;A profiles if any of users' answers contain fewer characters than the current settings require.</td>
</tr>
<tr>
<td>User-defined questions are shorter than required</td>
<td>Select to have users update their Q&amp;A profiles if any of the user-defined questions contain fewer characters than the current settings require.</td>
</tr>
<tr>
<td>User has specified the same answer for several questions</td>
<td>Select to have users update their Q&amp;A profiles if Q&amp;A profiles contain the same answer for different questions if the current settings specify the opposite.</td>
</tr>
<tr>
<td>Settings for encrypting user's answers have been changed since Q&amp;A profile creation</td>
<td>Select to have users update their Q&amp;A profiles if the current encryption setting (defined by the Store answers using reversible encryption option in the Q&amp;A profile settings) has been changed since Q&amp;A profile creation. For example, when users created their profiles, the option was disabled, and later the option became enabled, and vice versa.</td>
</tr>
<tr>
<td>The question list users answered to create Q&amp;A profile was removed or disabled</td>
<td>Select to have users update their Q&amp;A profiles if the question list they used when registering was deleted or disabled. For example, if the question list in a particular language was deleted.</td>
</tr>
</tbody>
</table>

6. To edit the notification template, use a WYSIWYG editor in the **Configure email notification** section.

7. To define the default notification language, click the language link next to the **Default language** option and select the required language.

8. To specify the notification text in another language, click **Add new language** and select the required language. Notification templates in 17 languages are available out of the box (English, Chinese (Simplified), Chinese (Traditional), Danish, Dutch, French, German, Italian, Japanese, Korean, Portuguese (Brazil), Portuguese (Portugal), Russian, Spanish, Polish, Czech, Swedish). The language of the notification message corresponds to the language of a user’s Q&A profile. If the corresponding language is not available, the notification message is sent in the default language.

9. To specify the daily number of new users who will be invited to create or update their Q&A profiles, enter the number in the **Set the daily number of users to be invited** spin box. Use this option to reduce server load and enhance performance.

10. Click **Save**.
IMPORTANT: To send email notifications to users, you must specify an outgoing mail server (SMTP server). For more information on how to configure the SMTP server, see Outgoing Mail Servers on page 137.

**Remind Users to Create/Update Profiles**

By using this enforcement rule, you can configure Password Manager for AD LDS to remind users to create or update their Q&A profiles. If you configure this enforcement rule, users will be notified by email.

For this enforcement rule you can configure multiple notification scenarios depending on the invitation date.

The notification is performed by the Reminder to Create/Update Profile scheduled task. Note that email notification starts only after this scheduled task has run. For more information on the scheduled tasks, see Reminder to Create/Update Profile Task on page 141.

IMPORTANT: To notify users by email, the Reminder to Create/Update Q&A Profile scheduled task should be enabled.

This enforcement rule is disabled by default. To enable the rule, on the Home page of the Administration site, expand the required enforcement rules section, click Remind Users to Create/Update Q&A Profiles, and then click Enable.

To configure this enforcement rule, you must specify a user scope and notification scenarios.

**To configure the enforcement rule user scope**

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

   NOTE: When prompted to log in, provide your domain user name in a domain-name\username format.

2. Select the Management Policy you want to modify.

3. Expand the Enforcement Rules section and click Remind Users to Create/Update Q&A Profiles.

4. To set the user scope of this rule, click Configure under Configure the rule's scope, specify the following settings and click Save:

**Table 12: Configure the scope of the rule**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users from the user scope of the Management Policy</td>
<td>Select this option to include all users from the Management Policy user scope</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>The following users</td>
<td>Select this option to specify groups included to and excluded from the enforcement rule scope.</td>
</tr>
<tr>
<td>Users included both in the Management Policy user scope and the following groups</td>
<td>Specify groups included in the enforcement rule scope. Note, that only users belonging both to the Management Policy user scope and the specified groups will be included in the enforcement rule scope. To browse for groups, click Add, select the required groups and click Save.</td>
</tr>
<tr>
<td>Users excluded from the rule’s scope</td>
<td>Specify groups excluded from the enforcement rule scope. To browse for groups, click Add, select the required groups and click Save.</td>
</tr>
</tbody>
</table>

**To configure notification scenarios**

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.
   
   **NOTE:** When prompted to log in, provide your domain user name in a domain-name\username format.

2. Select the Management Policy you want to modify.

3. Expand the Enforcement Rules section and click Remind Users to Create/Update Q&A Profiles.

4. To add a new notification scenario, click Add, or to modify an existing notification scenario click Edit in the Apply the following notification scenarios to users from the rule’s scope section.

5. In the User was invited to create/update Q&A profile N days ago option, enter the required number of days to apply this enforcement rule to users who were invited to register with Password Manager for AD LDS or update their Q&A profiles the specified number of days ago. Click Next.

6. Edit the email notification template if necessary. Specify the following settings if required and click OK:
   
   - To define the default notification language, click the language link next to the Default language option and select the required language.
   
   - To specify the notification text in another language, click Add new language and select the required language. Notification templates in 17 languages are available out of the box (English, Chinese (Simplified), Chinese (Traditional),
Remind Users to Change Password

By using this enforcement rule you can configure Password Manager for AD LDS to notify users about password expiration. If you configure this notification, users will be notified by email.

The notification schedule is defined by the Reminder to Change Password scheduled task. Note that notification starts only after this scheduled task has run. For more information on the scheduled tasks, see Reminder to Change Password Task on page 142.

IMPORTANT: If you disable the Reminder to Change Password scheduled task, users will not be reminded of password expiration.

To enable the rule, on the Home page of the Administration site, expand the required enforcement rules section, click Remind Users to Change Password, and then click Enable.

To configure this enforcement rule, you must specify a user scope, conditions when an email notification should be sent and an email notification text.

To configure this rule

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

   IMPORTANT: When prompted to log in, provide your domain user name in a domain-name\username format.

2. Select the Management Policy you want to modify.

3. Expand the Enforcement Rules section and click Remind Users to Change Password.

4. To set the user scope of this rule, click Configure under Configure the rule’s scope, specify the following settings and click Save:

Table 13: Configure the scope of rule

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users from the user scope of the Management Policy</td>
<td>Select this option to include all users from the Management Policy user scope to the rule’s scope.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>The following users</td>
<td>Select this option to specify groups included to and excluded from the rule’s scope.</td>
</tr>
<tr>
<td>Users included both in the Management Policy user scope and the following groups</td>
<td>Specify groups included in the rule’s scope. Note, that only users belonging both to the Management Policy user scope and the specified groups will be included in the rule’s scope. To browse for groups, click <strong>Add</strong>, select the required groups and click <strong>Save</strong>.</td>
</tr>
<tr>
<td>Users excluded from the rule’s scope</td>
<td>Specify groups excluded from the rule’s scope. To browse for groups, click <strong>Add</strong>, select the required groups and click <strong>Save</strong>.</td>
</tr>
</tbody>
</table>

1. To specify the conditions under which users should be notified to change their passwords, click **Configure** under **Notify users who meet the following condition**, specify the number of days before password expiration and click **OK**.

2. To edit the notification template, use a WYSIWYG editor in the **Configure email notification** section.

3. To define the default notification language, click the language link next to the **Default language** option and select the required language.

4. To specify the notification text in another language, click **Add new language** and select the required language. Notification templates in 17 languages are available out of the box (English, Chinese (Simplified), Chinese (Traditional), Danish, Dutch, French, German, Italian, Japanese, Korean, Portuguese (Brazil), Portuguese (Portugal), Russian, Spanish, Polish, Czech, Swedish). The language of the notification message corresponds to the language of a user’s Q&A profile. If the corresponding language is not available, the notification message is sent in the default language.

5. Click **Save**.

**IMPORTANT:** To send email notifications to users, you must specify an outgoing mail server (SMTP server). For more information on how to configure the SMTP server, see **Outgoing Mail Servers** on page 137.
General Settings

General Settings Overview
Search and Logon Options
Import/Export Configuration Settings
Outgoing Mail Servers
Diagnostic Logging
Scheduled Tasks
Web Interface Customization
Feedback Form
Instance Reinitialization
Realm Instances
AD LDS Instance Connections
Extensibility Features
RADIUS Two-Factor Authentication
Unregistering users from Password Manager
Working with Redistributable Secret Management account
Email Templates

General Settings Overview

This section outlines the procedures required to configure general settings that apply to all created Management Policies, such as:

- Search and logon options
- Import/export of configuration settings
- Outgoing mail servers
- Diagnostic logging
- Scheduled tasks
- Web interface customization
- Reinitialization
- Realm instances
- AD LDS instance connections

## Search and Logon Options

By configuring the search and logon options you specify how users and helpdesk operators search for their accounts and log in on the Self-Service and Helpdesk sites. You can also configure Password Manager for AD LDS to display CAPTCHA or reCAPTCHA images and allow or prohibit account search on the Self-Service site.

## Configuring Search and Security Options for the Self-Service Site

To configure account search options

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

   **NOTE:** When prompted to log in, provide your domain user name in a domain-name\username format.

2. On the menu bar, click **General Settings**, then click the **Search and Logon** tab, and select the **Self-Service site** option from the drop-down list.

3. Configure the following options as required:

### Table 14: Search and Logon options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not allow users to search for their accounts</td>
<td>Select this radio button to require users to enter either their logon names. Other user account attributes can be configured to Self-Service site or HelpDesk Site to find their accounts.</td>
</tr>
<tr>
<td>Show the list of application directory partitions to allow users to select the partition for logging in</td>
<td>Select this check box to allow users to see a list of application directory partitions registered with Password Manager.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td>Manager for AD LDS on the Self-Service site. If the list is displayed, users will be able to select the application directory partition their accounts belong to. Note, that aliases you specified in the connections to the partitions will be displayed in the list.</td>
<td></td>
</tr>
<tr>
<td>Users must enter the following user account attribute for identification (this may slow down the performance)</td>
<td>Select this option to require users to search for their accounts by using the specified attribute of user account in AD LDS. In the text box under the radio button, enter the attribute name. For example, you can use the attribute email to require users to enter their emails to search for accounts on the Self-Service site.</td>
</tr>
<tr>
<td>Allow users to search for their accounts</td>
<td>Select this radio button to allow users to perform account search by using the locate account functionality of the Self-Service site. Users can enter their first or last name, or email address to find their accounts. By selecting this option, you can specify the number of user accounts that are displayed in search results. To do this, specify the required number in the &quot;Number of users to display in search results&quot; field.</td>
</tr>
<tr>
<td>Allow user search from external network</td>
<td>Select the check box to allow user searching capabilities on Self-Service Site from an external network or unselect the check box to disable searching capabilities on Self-Service Site from an IP address not specified in the defined corporate IP address range. For more information on specifying a defined Corporate IP Address Ranges, see Location sensitive authentication. For more information on how a user search works on the external network, see Partial user search on external network.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>If <strong>Allow user search from external network</strong> checkbox is unchecked and corporate range is not configured, by default every network is treated as an External network until it is defined under <strong>Corporate IP Address Ranges</strong>. Hence user search behaves as though the user site is accessed from external network</td>
<td></td>
</tr>
<tr>
<td>Search in multiple application directory partitions</td>
<td>Select this option to enable users to search for their accounts in all application directory partitions registered with Password Manager for AD LDS.</td>
</tr>
<tr>
<td>Automatically show available self-service tasks if only one account is found</td>
<td>Select this option to automatically open the Home page of the Self-Service site for the user if only one user account matching the search criteria is found.</td>
</tr>
<tr>
<td>User account attributes to display in search results</td>
<td>Select check boxes next to the user account attributes that you want users to view in search results. You can select any of the following attributes: First name, Initials, Last name, Name, Full name, User logon name, E-mail</td>
</tr>
</tbody>
</table>

4. Click **Save**.

**Partial user search on external network**

When you search for a user from an external network and the **Allow user search from external network** check box is un-checked, the application still displays the self-service tasks for certain users based on the below mentioned criteria:

- Users can reach the **Dashboard** page only when the search criteria exactly matches with the search results.
• If the user name to be searched is part (substring) of another username, Search Results get listed only for the single user, based on the exact match.

• If the user name to be searched is part (substring) of multiple usernames, Search Results show **No accounts matching your search criteria have been found. Check the information you entered and try again** message.
Let us consider the below mentioned users in the user scope. Search behavior and result are as given in the table.

- ABCEFG_1
- ABCEFG_2
- ABCEFG_3
- ABCEFG_11
- XYZEF

<table>
<thead>
<tr>
<th>S.No</th>
<th>Search String</th>
<th>Dashboard Status</th>
<th>Search Results</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>XYZ</td>
<td>✗</td>
<td>✗</td>
<td>“No accounts matching your search criteria have been found. Check the information you entered and try again.” even though search string is part of XYZEF.</td>
</tr>
<tr>
<td>2</td>
<td>XYZEF</td>
<td>✓</td>
<td>✗</td>
<td>Takes user to dashboard of XYZEF.</td>
</tr>
<tr>
<td>3</td>
<td>ABCE</td>
<td>✗</td>
<td>✗</td>
<td>“No accounts matching your search criteria have been found. Check the information you entered and try again” Since there are multiple users matching the search string.</td>
</tr>
<tr>
<td>4</td>
<td>ABCEFG_1</td>
<td>✗</td>
<td>✓</td>
<td>Only ABCEFG_1 is listed even though search string is part of ABCEFG_11.</td>
</tr>
<tr>
<td>5</td>
<td>ABCEFG_3</td>
<td>✓</td>
<td>✗</td>
<td>Takes us to dashboard of ABCEFG_3.</td>
</tr>
</tbody>
</table>

**Conventions:**

**Dashboard Status** - It indicates whether the user is able to view the respective workflow tasks in the Self-service site.

**Search Results** - It indicates the possible search results obtained after the search criteria.

- ✓ - It indicates that the workflow page appears for the user.
- ✗ - It indicates that the workflow page does not appear for the user.

**Configuring Security Options**

By configuring the security options you can specify whether CAPTCHA or reCAPTCHA images should be displayed on the Find Your Account page to prevent bot attacks. reCAPTCHA is a free CAPTCHA service provided by Google.
To start using reCAPTCHA you need to sign up and get reCAPTCHA keys on the following web site: http://www.google.com/recaptcha.

When getting the keys, provide the DNS name of the domain where Password Manager Self-Service sites are installed. If the Self-Service sites are installed in different domains, select the Enable this key on all domains check box to create a global key.

To learn more about using and configuring reCAPTCHA, go to http://www.google.com/recaptcha/learnmore.

To configure security options

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

2. On the menu bar, click General Settings, then click the Search and Logon Options tab, and select the Self-Service site option from the drop-down list.

3. In the Security Settings section select the Show a security image to prevent bot attacks check box to have the Self-Service site display a picture with characters and require the user to enter the characters on the picture. This feature provides enhanced protection against automated attacks.

4. Select the Display CAPTCHA radio button if you want the Self-Service site to show CAPTCHA images on the Find Your Account page. Click Settings to configure the following CAPTCHA settings:
   
   - **Number of characters** Specify the number of characters that will be displayed on a CAPTCHA image.
   
   - **Noise level** Select the noise level for a CAPTCHA image. The higher the level the more difficult it will be to read the characters.

5. Select the Display reCAPTCHA radio button if you want the Self-Service site to show reCAPTCHA images on the Find Your Account page. Click Settings to configure the following reCAPTCHA settings:
   
   - **Public key** Specify the public key you received when configuring reCAPTCHA on the reCAPTCHA Web site.
   
   - **Private key** Specify the private key you received when configuring reCAPTCHA on the reCAPTCHA Web site.
   
   - **Theme** Select a color theme for the reCAPTCHA widget.

6. Select the Show a security image every time the search is performed check box to show a CAPTCHA or reCAPTCHA image every time the search is performed on the Find Your Account page of the Self-Service page. Selecting this option increases protection against bot attacks.

7. Click Save.
Configuring Search Options for the Helpdesk Site

To configure search options

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

   NOTE: When prompted to log in, provide your domain user name in a domain-name\username format.

2. On the menu bar, click General Settings, then click the Search and Logon tab, and select the Helpdesk site option from the drop-down list.

3. In the displayed text box, specify the attribute of helpdesk operators’ accounts in AD LDS that helpdesk operators should use to log in on the Helpdesk site. For example, userPrincipalName.

4. Select the Hide the list of application directory partitions if only one application directory partition is added to the helpdesk scope option if required. If several application directory partitions are included in the helpdesk scope, helpdesk operators will be required to select the corresponding partition before logging in.

Import/Export Configuration Settings

You can export configuration settings from the current Password Manager instance to a configuration file to back up the instance or create replicas of the existing instance.

Exporting Configuration Settings

By exporting configuration settings to a configuration file, you can back up the current instance or use the configuration file to create a Password Manager realm.

A realm is a group of Password Manager instances using common realm settings (encryption and hashing algorithms, realm affinity ID, etc.) and configuration settings, including but not limited to Management Policies, general settings, password policies, etc.

If you want to create a realm, you need to export the configuration settings from a Password Manager instance and create a replica of this instance by importing the configuration settings. To learn more about creating Password Manager realms, see Installing Multiple Instances of Password Manager for AD LDS on page 17.
To export configuration settings

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

   NOTE: When prompted to log in, provide your domain user name in a domain-name\username format.

2. On the menu bar, click General > Settings, then click the Import/Export tab and select the Export configuration settings option.

3. Enter the password to protect the configuration file and click Export.

   IMPORTANT: Remember and store the password that is generated while exporting the configuration file. You must enter this password when importing the configuration file for a new instance when, you want to join to a realm or restoring the configuration. Losing this password requires re-installation of the application.

   Export the configuration settings and save in a secure location. Use these settings to create secondary instances of Password Manager, and to recover data in the event of server disaster, or serious data loss.

Importing Configuration Settings

To restore a Password Manager instance or to join an instance to a realm, you need to import the configuration settings to such an instance.

To import configuration settings

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

   NOTE: When prompted to log in, provide your domain user name in a domain-name\username format.

2. On the menu bar, click General Settings, then click the Import/Export tab and select the Import configuration settings option.

3. Click Upload to select the configuration file that you exported earlier.

4. Enter the password and click Import.

Outgoing Mail Servers

You can configure one or more outgoing mail servers to send email notifications. If there are several servers, Password Manager for AD LDS will first attempt to use the top one in
To add outgoing mail servers (SMTP)

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

   **NOTE:** When prompted to log in, provide your domain user name in a domain-name\username format.

2. On the menu bar, click General Settings|SMTP Servers and then click Add SMTP server.

3. In the Add SMTP Server dialog box, configure the following options and click Save:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| Server name                 | Type the SMTP server name. If the SMTP server uses the port which is different from the default SMTP port 25, you may specify the port using the following format: <server name>:<port number>
|                             | where <server name> is the server name and <port number> is the port number used for SMTP communication.                                   |
| Sender email address        | Type the sender's email address.                                                                                                                                                                   |
| This server requires authentication | Select if the SMTP server requires authentication.                                                                                                                                                       |
| User name                   | Type the user name under which Password Manager for AD LDS will access the SMTP server.                                                                                                           |
| Password                    | Type the password for this account.                                                                                                                                                                 |
| Confirm password            | Re-type the password.                                                                                                                                                                               |
| The server requires an encrypted connection (SSL) | Select if the SMTP server requires an encrypted connection (SSL).                                                                                                                                  |

4. Follow steps 2-3 to add any additional SMTP servers.

**NOTE:** You can use the Test settings button to validate the SMTP server that you have configured. An email will be sent to the specified email address if the provided details are valid. If any of the details are invalid, a error message is displayed. You can configure the subject text of the email by configuring the value of Resource Id, "Admin.Scenario.Action.TestSMTP.Settings.TestEmail.Subject" in the Admin.xml file.
5. Use the Move Up and Move Down buttons to change the order of the SMTP servers in the list.

The order of the servers in the list specifies how Password Manager for AD LDS uses the servers to send email notification messages. Password Manager for AD LDS will first attempt to use the servers at the top of the list.

To remove a server from the list of outgoing SMTP mail servers

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

   NOTE: When prompted to log in, provide your domain user name in a domain-name\username format.

2. On the menu bar, click General Settings, and then click the SMTP Servers tab.

3. On the SMTP Servers page, select the SMTP server you want to remove and click Remove.

Diagnostic Logging

Password Manager for AD LDS provides a simple and convenient way to collect the diagnostic information about the activity of Password Manager for AD LDS. Diagnostic logging is mainly intended to be used by support personnel for troubleshooting purposes.

To enable diagnostic logging in Password Manager for AD LDS

1. On the home page of the Administration site, click General Settings, and then click the Logging Settings tab.

2. Configure the following options as required:

Table 16: Diagnostic logging options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specify the path to the log folder:</td>
<td>Type a path to the folder to store the diagnostic information.</td>
</tr>
<tr>
<td>Set log level</td>
<td>The following log levels are available:</td>
</tr>
<tr>
<td></td>
<td>Turn off logging - Select this option to turn off logging.</td>
</tr>
<tr>
<td></td>
<td>Log errors only - Select this option to log only errors.</td>
</tr>
<tr>
<td></td>
<td>Verbose logging - Select this option to log the most extended diagnostic information.</td>
</tr>
</tbody>
</table>
IMPORTANT: Do not enable verbose logging for long periods of time. Verbose logging creates log files that can accumulate quickly. Always monitor available disk space when verbose logging is enabled.

3. Click Save.

Scheduled Tasks

When installing Password Manager for AD LDS, the Password Manager setup adds the following scheduled tasks on the computer where Password Manager for AD LDS is installed: Invitation to Create/Update Profile, Reminder to Create/Update Profiles, Reminder to Change Password, Maximum Password Age Policy, update RADIUS server status, and User Status Statistics.

NOTE: Active Directory sites scheduled task is not applicable for Password Manager ADLDS.

Invitation to Create/Update Profile Task

This task is used to enumerate users who are not registered with Password Manager for AD LDS or must update their Q&A profiles and send email notifications to such users. This task is applied to users who have not been invited to create or update their Q&A profiles.

The scope of this task corresponds to the scope of the Invite Users to Create/Update Q&A Profiles user enforcement rule.

To each user from the user scope, the task is applied only once. After a user has been invited to create or update his Q&A profile, the Reminder to Create/Update Profile task will be applied to this user if configured.

You should configure this scheduled task to enable the Invite Users to Create/Update Q&A Profiles user enforcement rule. If you disable this scheduled task, the user enforcement rule will not be implemented. For more information on this user enforcement rule, see Invite Users to Create/Update Profiles on page 122.

To schedule this task

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

NOTE: When prompted to log in, provide your domain user name in a domain-name\username format.
2. On the menu bar, click **General Settings**, then click the **Scheduled Tasks** tab.
3. Click **Edit** under the **Invitation to Create/Update Profile** task.
4. Select the **The task is enabled** check box.
5. From the drop-down list select one of the following options: **Run hourly**, **Run daily** or **Run weekly**.
6. Depending on the option selected above, specify the time and/or days of the week when this task should be run.
7. Under **Run the task on this Password Manager instance**, select the Password Manager server on which the task should be run.
   
   **IMPORTANT:** The task status can be viewed only on the Password Manager instance on which the task is scheduled to run.
8. Click **Save**.

To force the task to run earlier than scheduled, click the **Run now** link under the task.

**Reminder to Create/Update Profile Task**

This task is used to send notifications to users who have been invited to create or update their Q&A profiles. If you configure the notification schedule, the task will send email notification messages to corresponding users.

The scope of this task corresponds to the scope of the Remind Users to Create/Update Q&A Profiles user enforcement rule.

You should configure this scheduled task to enable the Remind Users to Create/Update Q&A Profiles user enforcement rule. If you disable the scheduled task, the user enforcement rule will not be implemented. For more information on this user enforcement rule, see Remind Users to Create/Update Profiles on page 125.

**To schedule this task**

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is `http://<ComputerName>/PMAdminADLDS/`.
   
   **NOTE:** When prompted to log in, provide your domain user name in a domain-name\username format.
2. On the menu bar, click **General Settings**, then click the **Scheduled Tasks** tab.
3. Click **Edit** under the **Reminder to Create/Update Profile** task.
4. Select the **The task is enabled** check box.
5. From the drop-down list select one of the following options: **Run hourly**, **Run daily** or **Run weekly**.
6. Depending on the option selected above, specify the time and/or days of the week when this task should be run.
7. Under **Run the task on this Password Manager instance**, select the Password Manager server on which the task should be run.

   **IMPORTANT:** The task status can be viewed only on the Password Manager instance on which the task is scheduled to run.

8. Click **Save**.

   To force the task to run earlier than scheduled, click the **Run now** link under the task.

---

**Reminder to Change Password Task**

This task is used to send notifications about password expiration. Notifications will be sent to users whose passwords expire in the number of days specified in the Remind Users to Change Password user enforcement rule.

The scope of this task corresponds to the scope of the Remind Users to Change Password user enforcement rule.

You should configure this scheduled task to enable the Remind Users to Change Password user enforcement rule. If you disable the scheduled task, the user enforcement rule will not be implemented. For more information on this user enforcement rule, see **Remind Users to Change Password** on page 127.

**To schedule this task**

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

   **NOTE:** When prompted to log in, provide your domain user name in a domain-name\username format.

2. On the menu bar, click **General Settings**, then click the **Scheduled Tasks** tab.

3. Click **Edit** under the **Reminder to Change Password** task.

4. Select the **The task is enabled** check box.

5. From the drop-down list select one of the following options: **Run hourly**, **Run daily** or **Run weekly**.

6. Depending on the option selected above, specify the time and/or days of the week when this task should be run.

7. Under **Run the task on this Password Manager instance**, select the Password Manager server on which the task should be run.

   **IMPORTANT:** The task status can be viewed only on the Password Manager instance on which the task is scheduled to run.

8. Click **Save**.

   To force the task to run earlier than scheduled, click the **Run now** link under the task.
Maximum Password Age Policy Task

This task is used to force users to change passwords at next logon if password’s maximum age is reached.

The scope of this task is the scopes of all configured One Identity password policies. For more information on One Identity password policies, see Creating a Password Policy on page 165.

This task applies the maximum password age rule set in the configured One Identity password policies. If the maximum password age is reached, users will be required to change password at next logon.

To schedule this task

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

   NOTE: When prompted to log in, provide your domain user name in a domain-name\username format.

2. On the menu bar, click General Settings, then click the Scheduled Tasks tab.
3. Click Edit under the Maximum Password Age Policy task.
4. Select the The task is enabled check box.
5. From the drop-down list select one of the following options: Run hourly, Run daily or Run weekly.
6. Depending on the option selected above, specify the time and/or days of the week when this task should be run.
7. Under Run the task on this Password Manager instance, select the Password Manager server on which the task should be run.

   IMPORTANT: The task status can be viewed only on the Password Manager instance on which the task is scheduled to run.

8. Click Save.

To force the task to run earlier than scheduled, click the Run now link under the task.

Update RADIUS server status

This task is used to update the RADIUS server status. By default, the schedule task runs for every 5 minutes.
To schedule the task

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

   **NOTE:** When prompted to log in, provide your domain user name in a domain-name\username format.

2. On the menu bar, click **General Settings**, then click the **Scheduled Tasks** tab.

3. Click **Edit** under the **Update RADIUS server status** task.

4. From the drop-down list select one of the following options: **Run hourly**, **Run daily** or **Run weekly**.

5. Depending on the option selected above, specify the time and/or days of the week when this task should be run.

6. Under **Run the task on this Password Manager instance**, select the Password Manager server on which the task should be run.

   **IMPORTANT:** The task status can be viewed only on the Password Manager instance on which the task is scheduled to run.

7. Click **Save**.

User Status Statistics Task

By default, the User Status Statistics task runs every day. Normally, it is not recommended to change the schedule, although if you have other heavy-duty tasks running at that time, we recommend that you reschedule the User Status Statistics task to run in off-peak hours.

The User Status Statistics task is used to do the following:

- Enumerating users for licensing purposes. Password Manager is licensed for a specific number of user accounts enabled for management. The task checks whether the managed user count is within the license limit.
- Collecting statistic information about users including the total user count, the number of users registered and the users not-registered with Password Manager for AD LDS, the number of users required to register with Password Manager for AD LDS, and the number of users required to update profile. This information is collected for all application directory partitions managed by a specific Password Manager instance and displayed on the Reports page of the Administration site.

The scope of this task corresponds to user scopes of all configured Management Policies.

To schedule this task

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is
1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

   **NOTE:** When prompted to log in, provide your domain user name in a domain-name\username format.

2. On the menu bar, click *General Settings*, then click the *Scheduled Tasks* tab.
3. Click *Edit* under the *User Status Statistics* task.
4. From the drop-down list select one of the following options: *Run hourly*, *Run daily* or *Run weekly*.
5. Depending on the option selected above, specify the time and/or days of the week when this task should be run.
6. Under *Run the task on this Password Manager instance*, select the Password Manager server on which the task should be run.

   **IMPORTANT:** The task status can be viewed only on the Password Manager instance on which the task is scheduled to run.

7. Click *Save*.

To force the task to run earlier than scheduled, click the *Run now* link under the task.

### Clear Old Records from Reporting Database

Use this task to clean up records in the reporting database. The administrator needs to provide a date range and select particular record types to delete the records. The administrator can schedule a task on a specific date and time.

**To schedule the task:**

1. Connect to the Administration site by typing the Administration site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMAdminADLDS/.

   **NOTE:** When prompted to log in, provide your domain user name in a domain-name\username format.

2. On the menu bar, click *General Settings*, then click the *Scheduled Tasks* tab.
3. Click *Edit* under *Clear Old Records from Reporting Database* to open the console.
4. Select the *The task is enabled* checkbox.
5. Select *Archive and Clear Records* or *Clear Records*.
6. Select the date range from the *From Date* and *To Date* date pickers.
7. Select the checkboxes corresponding to the record types that you want to clear, in *Select Record Types* section.
8. Alternatively, select the *Select All* checkbox to select all the record types to clear.
9. Select the date and time from the **Start at** date picker to schedule the task to clear the records.
10. Select the Password Manager for AD LDS instance to run the task.
11. Click **Save** to save all the settings, and schedule the task.

### Web Interface Customization

Web Interface Customization provides a simple and convenient way to customize the appearance of the Self-Service and Helpdesk sites. For example, you can change the company and product logos, splash screen logos, and modify the color scheme.

The default Product logo and the Company logo specific to Legacy Self Service site are transparent images which are not applicable to the Password Manager Self-Service site. Hence, the transparent images may appear to be missing in the Password Manager Self-Service site.

### Enabling Self-Service UI 5.9.6

The following options appear only in case of an Inplace Upgrade of Password Manager to version 5.9.6 since inplace upgrade is the only upgrade which retains the Legacy Self Service site along with the Password Manager Self Service site ([Self-Service UI version 5.9.5 onwards](#)).

- Maintain Self-service site (pre-5.9.5)
- Switch to Self-service site (5.9.5 onwards)

**IMPORTANT:**

- The default product logo and the company logo image used in the Legacy Self Service site may not be compatible with the Password Manager Self Service site as there is a limitation to the pixels in the image.
- Users could apply any valid custom product logo and company logo to the Legacy Self service site and the same gets applied on the Password Manager Self-service site ([Self Service UI 5.9.5 onwards](#)).

**To replace product and company logos with custom images**

1. On the home page of the Administration site, click **General Settings**, and then click the **Web Interface Customization** tab.
2. Under the **Product logo (all interfaces and versions)** option, click **Upload** to browse your custom image. The uploaded image appears as a preview. Note, the image size must be 400 by 48 pixels and the image must be saved as a PNG with transparency.
3. Under the **Company logo (all interfaces and versions)** option, click **Upload** to browse your custom image. The uploaded image appears as a preview. Note, the image size must be 210 by 48 pixels and the image must be saved as a PNG with transparency.

4. Click **Save**.

**NOTE:** When you click **Reset to Default**, the customized product logo/ company logo gets reset to default.

---

**To replace splash screen product and company logos with custom images**

1. On the home page of the Administration site, click **General Settings**, and then click the **Web Interface Customization** tab.

2. Under the **Splash Screen Product logo (Self-Service UI 5.9.5 onwards)** option, click **Upload** to browse your custom image. The uploaded image appears as a preview. Note, that the image size must be 600 by 150 pixels and the image must be saved as a PNG with transparency. The Splash Screen Product logo appears as soon as you launch the self-service and help-desk sites.

3. Under the **Splash Screen Company logo (Self-Service UI 5.9.5 onwards)** option, click **Upload** to browse your custom image. The uploaded image appears as a preview. Note, the image size must be 400 by 200 pixels and the image must be saved as a PNG with transparency.

4. Click **Save**.

**NOTE:** When you click **Reset to Default**, the customized product logo/ company logo gets reset to default.

---

**To replace large product logo for the helpdesk site**

1. Under the **Large product logo (Helpdesk site logon page)** option, click **Upload** to browse your custom image. The uploaded image appears as a preview. Note, the image size must be 440 by 70 pixels and the image must be saved as a PNG with transparency.

2. Click **Save**.

**NOTE:** When you click **Reset to Default**, the customized product logo/ company logo gets reset to default.

By modifying the color scheme you can customize the appearance of the Self-Service and Helpdesk sites to fit your corporate standards. Each color scheme offers a main color, page title, text, hyperlink, icon, button, button text and error text colors. The main color defines the logo bar color.

---

**To modify the color scheme**

1. On the home page of the Administration site, click **General Settings**, and then click the **Web Interface Customization** tab.
2. Under the **Color scheme** option, select the required color scheme for the Self-Service and Helpdesk sites.

3. To preview the selected color scheme on the Password Manager self-service site, click **Preview (Self-Service UI version 5.9.5 onwards)** link.

4. To preview the selected color scheme on the Legacy self-service site and helpdesk site, click **Preview (Self-Service UI / Helpdesk pre 5.9.3)** link.

5. To adjust your own color scheme, click **Custom** and navigate to various components listed for the customization of the helpdesk site and the legacy self service site. The components that can be customized are Main color, page title color, text color, hyperlink color, icon color, button color, button text color, error text color.

6. Click **Save**.

**NOTE:**
- **Reset to Default** option resets the customized components and resets it back to the default in the Helpdesk site and the Legacy self service site.
- Custom color scheme cannot be applied to the Password Manager Self service site (**Self-Service UI version 5.9.5 onwards**)

### Feedback Form

Feedback form is introduced in Password Manager Self service site (**Self-Service UI version 5.9.5 onwards**). The feedback form allows the users of the Password Manager Self service site to share the feedback on the user experience.

**NOTE:** No personal information of the users are collected and stored, and the survey is anonymous. By default, the Feedback form in enabled in the Password Manager Self service site.

**To enable or disable feedback option**

1. On the home page of the Administration site, click **General Settings**, and then click the **Web Interface Customization** tab.

2. In the **Customize the appearance of the Self-Service and HelpDesk sites** section, switch the toggle key in the **Self-Service feedback form (5.9.5 onwards)** to enable or disable the feedback option. By default, the feedback option is enabled.

3. Click **Save**.
Instance Reinitialization

This section provides information on how to reinitialize an instance of Password Manager Service. Reinitialization means changing any of the settings you specified during initialization: the certificate for encrypting traffic between the standalone Self-Service and Helpdesk sites and the Password Manager Service, port number, encryption algorithm and key length, and hashing algorithm.

You may want to reinitialize the Password Manager instance to change any of the settings you specified when initializing the instance.

Modifying Service Connection Settings

Using service connection settings you can specify the following:

- **Certificate name** - use this setting to enter the name of the certificate for authentication and traffic encryption the Password Manager Service and the web sites (Self-Service and Helpdesk). By default, Password Manager for AD LDS uses a built-in certificate issued by One Identity for this purpose. If you install the web sites on a standalone server, it is recommended to replace the default certificate with a custom certificate issued by a trusted Windows-based authentication authority.

For more information on obtaining and installing custom certificates, see Specifying Custom Certificates for Authentication and Traffic EncryptionBetween Password Manager Service and Web Sites on page 19.

- **Port number** - use this setting to specify the port that the Self-Service and Helpdesk sites will use to connect to the Password Manager Service. By default, port 8081 is used.

  IMPORTANT: If you change the certificate and port number, the Self-Service and Helpdesk sites installed on standalone servers will be unavailable to users until you reinitialize the sites using the updated settings. For information, see Installing Legacy Self-Service, Password Manager Self-Service, and Helpdesk Sites on a Standalone Server on page 15.

To modify the service connection settings

1. On the home page of the Administration site, click **General Settings**, and then click the **Reinitialization** tab.
2. Under **Service connection settings**, from the **Certificate name** drop-down list, select the required certificate for authentication and traffic encryption between the Web sites (Self-Service and Helpdesk) and the Password Manager Service.
3. In the **Port number** text box, enter the port number you want the Web sites to use to connect to the Password Manager Service.
4. Click **Save**.
Modifying Advanced Settings

Using the advanced settings you can specify the following:

- **Encryption algorithm** - use this setting to select the encryption algorithm that is used to encrypt users’ answers to secret questions and other security sensitive information. You can select from two options: Triple DES and AES. By default, Password Manager for AD LDS uses Triple DES algorithm to encrypt data. Note, that users’ answers will be encrypted if the “Store answers using reversible encryption” option is selected in the Q&A Profile settings. Otherwise, the answers will be hashed.

- **Encryption key length** - use this setting to select whether a 192-bit or 256-bit encryption key will be used.

- **Attribute for storing Q&A profiles** - use this setting to enter the attribute name that will be used for storing Q&A profile data. By default, Password Manager for AD LDS stores Q&A profile data in the comment attribute of each user's account and the configuration data in the comment attribute of a configuration storage account, which is automatically created when installing Password Manager for AD LDS.

  **IMPORTANT:**
  
  If you change encryption settings and the attribute for storing Q&A profiles, the current instance will be excluded from a realm it belongs to and users may lose their Q&A profiles.

  When you change these settings, do the following to keep users’ Q&A profiles:
  
  - Export the current configuration when saving updated instance settings.
  - Update Q&A profiles using the Migration wizard (upload the exported configuration to the wizard) on the current instance.
  - To replicate new settings and updated Q&A profiles export the updated configuration from the current instance and import the configuration to other instances.

  If you do not use the Migration wizard to update users’ Q&A profile after changing the settings, users will have to re-register with Password Manager for AD LDS.

- **Hashing algorithm** - use this setting to select the hashing algorithm that will be used to hash users’ answers to secret questions. The following algorithms are available: MD5 and SHA-256. By default, Password Manager for AD LDS uses SHA-256 hashing algorithm. Password Manager for AD LDS will hash users’ answers if “Store answers using reversible encryption” option is not selected in the Q&A Profile settings.

  **IMPORTANT:** If you change the hashing algorithm, the selected algorithm will be applied to newly created Q&A profiles only. Existing Q&A profiles will be hashed with the previously selected algorithm.
To modify the advanced settings

1. On the home page of the Administration site, click **General Settings|Reinitialization**, and expand the **Advanced settings** section.
2. From the **Encryption algorithm** drop-down list, select the encryption algorithm for encrypting users’ answers to secret questions and other security sensitive data.
3. From the **Encryption key length** drop-down list, select whether a 192-bit or 256-bit encryption key will be used to encrypt data.
4. From the **Hashing algorithm** drop-down list, select the algorithm that will be used to hash users’ authentication answers.
5. In the **Select the attribute of user’s account in Active Directory in which user’s Questions and Answers profile and Corporate phone will be stored** section, provide the following data.
   a. **Security questions** - Enter the required security question.
   b. **Corporate Phone** - Enter the mobile number of the user.
   c. **Corporate email** - Enter the corporate’s email id of the user.
6. Click **Save**.

Once you click Save, **Reinitialize Instance** dialog box appears.

7. In the **Reinitialize Instance** dialog box, a password is generated for the configuration file that you should export to update users’ Q&A profiles and click **Export**
8. Click **Save**.

To update users’ Q&A profiles with new instance settings

Before running the Migration Wizard, update the following attributes in the Migration Wizard\Resources\productinfo.xml file:

- `<productNameFull>` - One Identity Password Manager for AD LDS
- `<productNameShort>` - Password Manager for AD LDS
- `<realmType>` - ADLDS

The values specified above can be also copied from One Identity\Password Manager for AD LDS\Service\Resources\productinfo.xml.

1. Run the Migration wizard from the Password Manager CD autorun window.
2. On the **Welcome** page, select the **Update users’ Q&A profiles with new instance settings** task.
3. On the next page, upload the configuration file you exported when reinitializing the instance. Click **Browse** to select the file, enter the password you specified for the file, and click **Next**.
4. Select users whose Q&A profiles you want to update and click **Next**. To select groups, click **Add** and do the following:
In the **Add Groups** dialog box, enter the group name, select the application directory partition from the list and click **Search**.

Select the required groups in the list and click **Save**.

5. On the next page, do one of the following and click **Next**:
   a. **Security Questions** - Provide the required security questions.
   b. **Corporate Phone** - Provide the required corporate phone
   c. **Corporate email, Personal email, and Personal phone** fields are not editable.

6. On the status page, click **View the report for detailed information** to view a detailed account of updating profiles. If you updated Q&A profiles in test mode, click **Update Q&A profiles in production mode**.

After you have updated the Q&A profiles with new instance settings, join other instances to this realm by exporting the configuration from the current instance and importing it to other instances. For more information on how to import and export configuration settings, see **Import/Export Configuration Settings** on page 136.

### Realm Instances

On the Administration site you can view a list of installed Password Manager instances belonging to one realm. This information is available on the Realm Instances page.

To open the Password Manager Service Instances page, on the Administration site click **General Settings**. On the **General Settings** page, click the **Realm Instances** tab.

In Realm instances, the Primary instance is in red for easy identification.

All Password Manager Service instances belonging to one realm share the following settings: certificate name, port number, encryption algorithm, encryption key length, hashing algorithm, attribute for storing Q&A profile data, realm affinity ID, and configuration data. These options are configured when initializing a Password Manager Service instance. To change any of these settings, see **Instance Reinitialization** on page 149.

### AD LDS Instance Connections

This section provides information on creating, modifying, and using connections to AD LDS instances.
Using Connections to AD LDS Instances

On the **General Settings|AD LDS Instance Connections** tab of the Administration site, you can view a list of available connections.

To manage AD LDS instance with Password Manager you need to create a connection to the required AD LDS instance. When adding a connection you can select an existing connection or create a new one. It is possible to use the same connection in different sections: user and helpdesk scopes, and password policies.

You can add a connection to an AD LDS instance either on the **AD LDS Instance Connections** tab or from the User scope, Helpdesk scope, and Password Policies pages.

Note, that when you modify the connection on the User scope, Helpdesk scope or Password Policies pages, you can select how you want to apply the updated connection settings: either for the specified section only or everywhere where this connection is used. If you choose to update settings for the specified section only, a copy of the connection will be created with these settings and will be added to the list of available connections to AD LDS instances.

**IMPORTANT:** When you modify the connection on the **AD LDS Instance Connections** tab, the updated settings will be automatically applied everywhere where this connection is used.

If you want to remove the connection from the list on the **AD LDS Instance Connections** tab, you should first remove it from all sections where it is used, and only then remove the connection from the list.

Specifying Access Account for AD LDS Instance Connections

When creating a connection, you must specify an access account - an account under which Password Manager will access an AD LDS instance and a specified application directory partition. You can use the Password Manager Service account, an Active Directory account or an AD LDS account. These accounts must have the following minimum set of permissions:

- Membership in the *Domain Users* group (for the Password Manager Service account and the Active Directory account only)
- Membership in the *Readers* group in the application directory partition (for the AD LDS account only)
- Membership in the *Administrators* group in the configuration directory partition
- The Read permission for all attributes of user objects
- The Write permission for the following attributes of user objects: `pwdLastSet, comment, unicodePwd, lockoutTime, msDS-UserAccountDisabled`
- The right to reset user passwords
The permission to create user accounts and containers in the Users container

The Read permission for attributes of the organizationalUnit object and container objects

The Write permission for the gpLink attribute of the organizationalUnit objects and container objects

The Read permission for the attributes of the container and serviceConnectionPoint objects in Group Policy containers

The permission to create container objects in the System container

The permission to create the serviceConnectionPoint objects in the System container

The permission to delete the serviceConnectionPoint objects in the System container

The Write permission for the keywords attribute of the serviceConnectionPoint objects in the System container

If you want to use the same connection in password policies as well, make sure the account has the following permissions:

The Read permission for attributes of the groupPolicyContainer objects.

The Write permission to create and delete the groupPolicyContainer objects in the System Policies container.

The permission to create and delete container and the serviceConnectionPoint objects in Group Policy containers.

The Read permission for the attributes of the container and serviceConnectionPoint objects in Group Policy containers.

The Write permission for the serviceBindingInformation and displayName attributes of the serviceConnectionPoint objects in Group Policy containers.

To add connection

1. On the home page of the Administration site, click the General Settings|AD LDS Instance Connections tab.
2. Click Connect to AD LDS instance to add a connection.
3. In the Connect to AD LDS Instance dialog, configure the following options:
   - In the Server name on which AD LDS instance is installed text box, type the name of the server to which you want to connect.
   - In the Port number (LDAP or SSL) text box, enter the port number that you specified when installing the AD LDS instance. If you select the Use SSL check box, enter the SSL port number; otherwise, LDAP port number. It is recommended to use SSL in your production environment.
   - In the Application directory partition text box, enter the name of the application directory partition from the AD LDS instance to which you want to connect.
   - In the Application directory partition alias text box, type the alias for the application directory partition which will be used to address the partition on the
Self-Service site.

- In the **Access account** section, select **Password Manager Service account** to have Password Manager access the AD LDS instance using the Password Manager Service account, otherwise, select **The following Active Directory account** or **The following AD LDS account** radio button and enter the required user name and password.

4. Click **Save**.

   **IMPORTANT:** After you create a connection on the General Settings|AD LDS Instance Connections tab, you can use it in the user scope, helpdesk scope and password policies by selecting the connection in the **Connect to AD LDS Instance** dialog on the corresponding page of the Administration site. For example, to use the connection in the user scope of your Management Policy, open the user scope of this Management Policy, click **Connect to AD LDS instance**, and select the corresponding connection from the list.

### Changing Access Account for AD LDS Instance Connections

**To change access account**

1. On the home page of the Administration site, click the **General Settings|AD LDS Instance Connections** tab.

2. Select the connection you want to modify and click **Edit**.

3. In the **Edit AD LDS Instance Connection** dialog, select **Password Manager Service account** to have Password Manager access the managed instance using the Password Manager Service account. Otherwise, select **The following Active Directory account** or **The following AD LDS account** and then enter the required user name and password. Note, that the selected account should have the required permissions.

4. Click **Save**. Note, that the updated settings will be applied everywhere where this connection is used.

### Removing Connection to AD LDS Instance

**To remove a connection**

1. On the Administration site, click the **General Settings|AD LDS Instance Connections** tab.

2. On the **AD LDS Instance Connections** page, select the connection you want to delete and click **Remove**. Note, to permanently remove the connection, it should be removed from all sections where it is used. The **Remove** link becomes available only after the connection is removed from all sections where it is used.
Extensibility Features

Extensibility features allow you to customize and extend the Password Manager for AD LDS functionality. The features include the following:

- Custom activities
- Built-in web service
- Custom web services
- Import/export of activities and workflows
- Troubleshooting mode

All these features are available only after you turn the extensibility on.

**To turn extensibility features on**

1. Open the Administration site and click the General Settings tab.
2. On the General Settings page, select the Extensibility tab.
3. On the Extensibility settings page, click the upper **Turn on** button.

After you turn the extensibility features on, you can also turn on the troubleshooting mode. When the troubleshooting mode is on, the following additional information is displayed:

- Identifiers of activities and workflows (on the Administration site)
- PowerShell output (on the Self-Service site)

**To turn the troubleshooting mode on**

1. Open the Administration site and click the General Settings tab.
2. On the General Settings page, select the Extensibility tab.
3. On the Extensibility settings page, click the upper **Turn on** button.
4. Click the **Turn on** button under the troubleshooting mode.

Extensibility Features Overview

Custom activities are activities whose behavior is defined by a PowerShell script. You can create a custom activity from scratch or convert a built-in activity to a custom one. For more information, see **Custom Activities** on page 82 and refer to the Password Manager SDK.

Built-in web service allow a third-party system to access a whole workflow or a specific activity using HTTP and data exchange in XML and JSON formats. You can use the built-in web service to execute a workflow and to interfere in a workflow execution process. For more information refer the Password Manager SDK.

Custom web services allow you to further extend the Password Manager functionality and enable scenarios that cannot be implemented using custom activities and the built-in web...
service. For example, you can create a custom web service that assigns passcodes to users employing the assign passcode functionality in Password Manager. For more information refer the Password Manager SDK.

Import/export of activities and workflows allows you to copy and share custom activities and workflows. For more information, see Importing and Exporting Workflows on page 81 and Importing and Exporting Custom Activities on page 84.

The troubleshooting mode provides you additional information about workflows and activities and their execution. When this mode is enabled, on the Administration site you can view identifiers of workflow and activities; you can use these identifiers in PowerShell scripts. On the Self-Service site, you can view the PowerShell output that allows you to troubleshoot the scripts.

**RADIUS Two-Factor Authentication**

RADIUS Two-Factor Authentication enables two-factor authentication on Password Manager. RADIUS Two-Factor Authentication uses one-time passwords to authenticate users on the Self-Service site and Helpdesk site.

To configure RADIUS Two-Factor Authentication in Password Manager, you have to configure the RADIUS server details in Password Manager.

*To configure RADIUS Two-Factor Authentication:*

1. On the home page of the Administration site, click General Settings | RADIUS Two-Factor.
   
   The **RADIUS Two-Factor Authentication** page is displayed.

2. Click Add RADIUS server to add a new RADIUS server for authentication.
   
   **RADIUS Two-Factor Authentication** page is displayed.

   **NOTE:** You can add only two servers, one is used as a primary server and the other as a secondary server. The server that is created first is considered as the primary server and used for RADIUS authentication.

3. In the **RADIUS Server (IP address or hostname)** field, enter the RADIUS server IP address.

4. In the **Port number** field, enter the port number assigned during configuration of RADIUS.

5. In the **RADIUS Shared Secret** field, enter the password set during RADIUS configuration.

6. Specify the ADLDS attribute to authenticate the user from the drop-down menu.

7. From the **Additional RADIUS Attribute** section, select the required RADIUS attribute from the drop-down menu. Specify the value for the selected attribute and click +.
The RADIUS attributes and the corresponding values that you add is displayed.

**NOTE:** The RADIUS attributes supported are **NAS-IP-Address**, **NAS-Port**, **NAS-Port-Type**, and **NAS-Identifier**.

8. Click **Save**.

**Unregistering users from Password Manager**

Using the unregister feature, users registered to the Password Manager can be removed. Note that the user is removed only from the Password Manager and not Active Directory.

**To unregister a user from the Password Manager**

1. On the home page of the Administration site, click **General Settings | Unregister Users**.

2. On the **Unregister Users** page:
   - If you want to unregister individual users, expand the **Select Users** tree, click **Add**, manually search for the individual user, select the required user from the results, and click **Save**.
   - If you want to select a user group, expand the **Select Groups** tree, click **Add**, manually search for the individual groups, select the required group from the results, and click **Save**.
   - If you want to select the entire organization unit (OU), expand the **Select Organizational Units** tree, click **Add**, manually search for the individual OU, select the required OU from the results, and click **Add**.

3. Click **Unregister User** to unregister the users.

**NOTE:**

- If you want to run the task at a specified time, select the **Schedule at** check box to specify the time to run the task and click **Save**.
- If a task to unregister an user is scheduled at a later time and you want to unregister the user at the current instance, click **Remove Setting** to delete the scheduled task settings and click **Save**.
- If you have the **Domain management account** configured with a user other than the Active Directory Administrator then, make sure that the Write permissions are available to the storage attribute of the security questions (comment, by default) for all the users/groups/OUs that is configured to be unregistered.
- If the users/groups/OUs that needs to be unregistered are a member of Readers/Administrators group in the ADLDS then, the Write Permissions are already inherited.
Working with Redistributable Secret Management account

Redistributable Secret Management Service (rSMS) is used to manage users password across multiple connected systems. Using rSMS service you can synchronize the passwords across connected systems. The rSMS service is installed with the Password Manager software.

An rSMS account must be created and configured to interact with the rSMS service to execute password change functionality on connected systems. After creating the rSMS account and configuring certificate binding settings (optional), you can configure the settings to reset the password in connected systems.

To create rSMS account and configure certificate binding settings

1. On the home page of the Administration site, click General Settings.
2. Click the rSMS Settings tab from the options.
   
   The Redistributable Secret Management Service page is displayed.

   NOTE: An rSMS account must be created before working with rSMS activity. An rSMS user is automatically created if the imported configuration file has the rSMS account details.

3. In the Create Account section, click Create Account to create an rSMS account.
4. In the Certificate binding section, select a custom certificate from the drop-down list, if available. By default, the built-in certificate is used.

   NOTE: If you import a configuration file, the rSMS certificate binding details are not imported. The default binding settings or the certificate binding settings of the system is used.

5. Select the IP address from the rSMS IP address drop-down list.

   NOTE: For built-in certificates, the Port number field is automatically populated with the value 20001. For custom certificates, custom port number can be provided.

6. Click Save Settings to save the certificate binding settings.

   NOTE:
   - By default, all Password Manager logs are available in C:\Windows\TEMP folder. If the default Password Manager log path is changed during an update, rSMS automatically uses the updated log path instead of the default path used earlier.
   - Additional rSMS logs are available in the rSMS.Service-{Date}.log file. Enable Password Manager logging from the Administrator site under General Settings | Logging Settings.
**Redistributable Secret Management Service supported platforms**

Redistributable Secret Management Service (rSMS) supports the platforms that are mentioned here.

<table>
<thead>
<tr>
<th>Platform</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>WindowsServer</td>
<td>A name for a group of server operating systems released by Microsoft.</td>
</tr>
<tr>
<td>SolarisSsh</td>
<td>A Unix operating system, using an SSH connection.</td>
</tr>
<tr>
<td>PanosSsh</td>
<td>An operating system developed by Acorn Computers, using an SSH connection.</td>
</tr>
<tr>
<td>Aixssh</td>
<td>A series of proprietary Unix operating systems developed by IBM, using an SSH connection.</td>
</tr>
<tr>
<td>OdbcMysql</td>
<td>An open-source relational database management system, using an ODBC Driver.</td>
</tr>
<tr>
<td>postgres</td>
<td>An open-source relational database management system (RDBMS).</td>
</tr>
<tr>
<td>vsphere</td>
<td>Server virtualization software</td>
</tr>
<tr>
<td>IloSsh</td>
<td>HP Integrated Lights-Out (iLO) is a proprietary embedded server management technology, using an SSH connection</td>
</tr>
<tr>
<td>OdbcSqlServer</td>
<td>A relational database management system, using an ODBC Driver.</td>
</tr>
<tr>
<td>ad</td>
<td>Microsoft Windows Active Directory</td>
</tr>
<tr>
<td>SonicWall</td>
<td>SonicWall Secure Mobile Access (SMA) is a unified secure access gateway.</td>
</tr>
<tr>
<td>Aws</td>
<td>Amazon Web Services (AWS), an on-demand cloud computing platform.</td>
</tr>
<tr>
<td>Acf2Tn3270</td>
<td>IBM’s Access Control Facility (z-Series), using a TN3270 connection.</td>
</tr>
<tr>
<td>F5BigIpSsh</td>
<td>A load balancer and a full proxy, using an SSH connection</td>
</tr>
<tr>
<td>TopSecretTn3270</td>
<td>CA TopSecret is a streamlined and scalable mainframe security for IBM’s zseries operating system, using a TN3270 connection.</td>
</tr>
<tr>
<td>OdbcSybase</td>
<td>Used to manage and analyze information in relational databases, using an ODBC Driver.</td>
</tr>
<tr>
<td>PixSsh</td>
<td>Cisco PIX (Private Internet eXchange) is an IP firewall, using an SSH connection.</td>
</tr>
<tr>
<td>FreeBsdSsh</td>
<td>FreeBSD is a free and open-source Unix-like operating system, using an SSH connection.</td>
</tr>
<tr>
<td>DracSsh</td>
<td>Dell Remote Access Controller (DRAC) is an out-of-band management platform, using a SSH connection.</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Hpuxssh</td>
<td>Hewlett Packard Unix Operating systems, using a SSH connection.</td>
</tr>
<tr>
<td>Acf2Ldap</td>
<td>Access Control Facility, a discretionary access control software security system over LDAP authentications.</td>
</tr>
<tr>
<td>RacfLdap</td>
<td>Resource Access Control Facility is an IBM security system that provides access control and auditing functionality for zSeries operating systems over LDAP authentications.</td>
</tr>
<tr>
<td>SapHana</td>
<td>A relational database management system.</td>
</tr>
<tr>
<td>LinuxSsh</td>
<td>Linux Operating system, using a SSH connection.</td>
</tr>
<tr>
<td>RacfTn3270</td>
<td>IBM's Resource Access Control Facility (z-Series), using a TN3270 connection.</td>
</tr>
<tr>
<td>SonicSsh</td>
<td>SonicOS, an operating system for SonicWall network security appliances (firewalls), using a SSH connection.</td>
</tr>
<tr>
<td>TopSecretLdap</td>
<td>CA TopSecret is a streamlined and scalable mainframe security for IBM's zseries operating system, using a SSH connection.</td>
</tr>
<tr>
<td>MongoDB</td>
<td>MongoDB is a cross-platform document-oriented database program.</td>
</tr>
<tr>
<td>JunosSsh</td>
<td>Junos OS is the FreeBSD-based operating system used in Juniper Networks hardware routers, using an SSH connection.</td>
</tr>
<tr>
<td>SapNetweaver</td>
<td>SAP NetWeaver is an open application server platform.</td>
</tr>
<tr>
<td>OdbcOracle</td>
<td>Oracle Database is a multi-model database management system, using an ODBC driver.</td>
</tr>
<tr>
<td>As400Tn3270</td>
<td>IBM's Application System/400, using a TN3270 driver.</td>
</tr>
<tr>
<td>FortinetSsh</td>
<td>Fortinet firewall client, using an SSH connection.</td>
</tr>
<tr>
<td>Ldap</td>
<td>A protocol used for accessing Active Directory object, user authentication, and authorization in windows server.</td>
</tr>
<tr>
<td>MacOsSsh</td>
<td>Apple Mac Operating system, using a SSH connection.</td>
</tr>
</tbody>
</table>

**Customizing Redistributable Secret Management log path**

By default, the rSMS logs are available in `C:\Windows\Temp\rSMS`. You have the option to customize the log path to record the logs at a different location.
**Customizing rSMS log path**

1. On the system where the Password Manager Admin site is installed, click **Start** and then **Services**.
2. On the **Services** window, right-click on **One Identity rSMS Service**.
3. Select **Properties** and check the location from the **Path to executable** section.
4. Open the command prompt with administrator privileges and navigate to the directory where **One Identity rSMS Service** is installed.
5. From the directory where **One Identity rSMS Service** is installed, run the `rSMS.Config.exe LogPath` command to view the rSMS log path.
   
   The log path currently used to record rSMS logs is displayed.
6. To update the log path, run the `rSMS.Config.exe LogPath -f <new path>` command. For example, `rSMS.Config.exe LogPath -f C:\PM`.
   
   The log path is updated. To confirm the log path run the `rSMS.Config.exe LogPath` command again.
7. Restart the **One Identity rSMS Service**.

**Email Templates**

Password Manager provides option to set the default template for confirmation e-mail. To send an auto generated email to user if workflow succeeds or fails, configure the email template from the **General Settings** tab for authentication.

*To configure default e-mail template:*

1. On the home page of the Administration site, click **General Settings**, and then click the **Email Template** tab.
2. Select the desired language from the **Select language to customize template** drop down menu, to customize the email template.
3. Click the + sign before the desired workflow to edit the template. Edit the subject and body of the notification template in the default language as required. When editing the notification template, you can use the parameters available in the notification editor, for example `#USER_ACCOUNT_NAME#`, `#WORKFLOW_RESULT#`, and others.
4. In the **Message format** box, select the format to use for the notifications. You can select from two options: either HTML or Plain text.
5. Select the default language from the **Select default language for email** drop down menu, to select the default email template to send to the user.
6. In the **User notification settings**, select one of the following options for user notification subscription:
- Subscribe users to this notification. Allow users to unsubscribe.
- Subscribe users to this notification. Do not allow users to unsubscribe.
- Do not subscribe users to this notification. Allow users to subscribe to this notification.

7. Click **Save**, to save the settings
Password Policies

About Password Policies
Creating a Password Policy
Managing Password Policy Scope
Configuring Password Policy Rules
Deleting a Password Policy

About Password Policies

By default, an AD LDS instance applies existing local or domain password policies. If a server on which AD LDS is installed belongs to a workgroup, the server's local password policy settings and account lockout settings are enforced. If the server on which AD LDS is running belongs to a domain, the password policy settings and account lockout settings from the domain are enforced.

You can use Password Manager for AD LDS to create additional password policies that define which passwords to reject or accept. For each policy, you can configure a number rules, for example, a password age rule, complexity and length rules, custom rule, and others. It is recommended to use the custom rule to display the settings of the local or domain password policy applied to the server on which AD LDS is running. For more information, see Custom Rule on page 179.

Password policy settings are stored in Group Policy objects (GPOs). A GPO is applied to a target organizational unit. Group Policy objects from parent containers are inherited by default. When multiple Group Policy objects are applied, the policy settings are aggregated. For information on how to apply a password policy and change the policy priority, see Managing Password Policy Scope on page 167.
Creating a Password Policy

To create a password policy, you need add a connection to the AD LDS instance to which this policy will be applied.

The account you use to access the AD LDS instance for which you want to create password policies should have the following permissions:

- The Read permission for attributes of the `groupPolicyContainer` objects.
- The Write permission to create and delete the `groupPolicyContainer` objects in the System Policies container.
- The permission to create and delete container and the `serviceConnectionPoint` objects in Group Policy containers.
- The Read permission for the attributes of the container and `serviceConnectionPoint` objects in Group Policy containers.
- The Write permission for the `serviceBindingInformation` and `displayName` attributes of the `serviceConnectionPoint` objects in Group Policy containers.

**To connect to AD LDS instance**

1. On the home page of the Administration site, click the **Password Policies** tab.
2. Click **Connect to AD LDS instance** to add an instance for which you want to create password policies.
3. If connections already exist, select a connection from the list. If you want to create a new connection, click **Add new connection**.
4. If you selected to create the new connection, in the **Connect to AD LDS Instance** dialog, configure the following options:

   - In the **Server name on which AD LDS instance is installed** text box, type the name of the server to which you want to connect.
   - In the **Port number (LDAP or SSL)** text box, enter the port number that you specified when installing the AD LDS instance. If you select the **Use SSL** check box, enter the SSL port number; otherwise, LDAP port number. It is recommended to use SSL in your production environment.
   - In the **Application directory partition** text box, enter the name of the application directory partition from the AD LDS instance to which you want to connect.
   - In the **Application directory partition alias** text box, type the alias for the application directory partition which will be used to address the partition on the Self-Service site.
   - In the **Access account** section, select **Password Manager Service account** to have Password Manager access the AD LDS instance using the Password Manager Service account, otherwise, select **The following Active Directory account** or **The following AD LDS account** radio button and enter the required user name and password.
5. Click **Save**.

For more information on modifying settings for the connection, see AD LDS Instance Connections on page 152.

**To create a password policy**

1. On the home page of the Administration site, click the **Password Policies** tab.
2. Click the `<N> One Identity Password Policies or One Identity Password Policies are not configured` link under the application directory partition that you want to manage.
3. On the **One Identity Password Policies for <application directory partition>** page, click the **Add a policy** button or **Add new password policy** link.
4. In the **Add New Policy** dialog box, type a name for the new policy and click **Save**.

**To configure settings for a password policy**

1. On the home page of the Administration site, click the **Password Policies** tab.
2. Click the `<N> One Identity Password Policies` link under the application directory partition that you want to manage.
3. On the **One Identity Password Policies for <application directory partition>** page, click **Edit** under the policy whose properties you want to view or modify.
4. On the **Policy Settings** tab of the **Password Policy Properties** dialog box, view or modify the following options, and then click **Save**:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disable this policy</td>
<td>Select this check box to temporarily turn off the policy.</td>
</tr>
<tr>
<td>Policy name</td>
<td>View or modify the name of the password policy.</td>
</tr>
</tbody>
</table>

5. Click the **Policy Rules** tab to configure the password policy rules by using the procedure outlined in Configuring Password Policy Rules on page 169, and then click **Save**.

6. Click the **Policy Scope** tab to manage the password policy links by using the procedure outlined in Managing Password Policy Scope on page 167, and then click **Save**.
Managing Password Policy Scope

This section provides information on how to apply a password policy to organizational units and groups in a managed AD LDS instance.

Applying Password Policies

In Password Manager (PM) application, scopes can be defined at multiple levels. Scopes act as a boundary in which you can define the groups and Organization Unit (OU), and can also associate policies into it.

The Default Management Policy allows you to configure both the user scope and the help desk scope. In the Management Policy scope, an admin can also associate the workflows, activities, and Q&A policy to the configured user groups and OU.

While configuring the user scope/help desk scope, an admin must define either a Group or an OU to indicate which group or OU can access the self-service site/helpdesk site. This means the users who are part of the configured group/OU comes under included group category. You could also define a different group/OU under an excluded group category. This means users who are part of these excluded group or OU cannot access self-service site/helpdesk site.

In case of Password Policy scope, admin needs to ensure the following:

- Password policies should only be applied to the user groups/ OUs that are part of the Userscope.
- Group that will be associated into the password policy scope must be part of the OU as well. This means users who are part of the group must also be the part of the OU as those users will have the same set of activities to be performed in the self-service site.
- An Administrator can create one or more password policies and can map each policy to single/ multiple user groups or OUs.
- By default, the newly created password policy is linked to the Domain name created in the management policy scope and gets applied to the “Authenticated users group. It means that all the users that are part of the usergroups and OUs configured in the user scope, will have the password policy applied.
- Group that will be associated into the password policy scope must be part of the OU as well. This means users who are part of the group must also be the part of the OU as those users will have the same set of activities to be performed in the self-service site.
IMPORTANT:

- While configuring the Policy Scope in Password Policy Properties window, it is mandatory to add both the group and the Organizational unit that the user is part of, for the policy rules to get applied for the users accessed in the self-service site.
- It is not possible to configure the same domain multiple times in a user scope, whereas multiple domains can be configured to the userscope.

The table below provides more information on different scenarios.
Let us consider the following groups/OU

**NOTE:** Do not define both OU and the group in the Management policy scope for the set password policy rule to get applied in the self-service site.

<table>
<thead>
<tr>
<th>S.N- o</th>
<th>Userscope</th>
<th>Password Policy Scope</th>
<th>Password Policy</th>
<th>Logged in self-service site</th>
<th>Is Password Policy applicable?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Included Group</td>
<td>Included OU</td>
<td>Excluded Group</td>
<td>Excluded OU</td>
<td>OU</td>
</tr>
<tr>
<td>1.</td>
<td>Group1</td>
<td>OU1</td>
<td>OU1</td>
<td>Grou p1</td>
<td>User1</td>
</tr>
<tr>
<td>2.</td>
<td>Group1</td>
<td>OU2</td>
<td>Group2</td>
<td>OU1</td>
<td>Grou p2</td>
</tr>
<tr>
<td>3.</td>
<td>Group3</td>
<td>OU1</td>
<td>Group1</td>
<td>OU2</td>
<td>Grou p3</td>
</tr>
<tr>
<td>4.</td>
<td>Group3</td>
<td>OU3</td>
<td>OU1</td>
<td>OU3</td>
<td>Grou p3</td>
</tr>
<tr>
<td>5.</td>
<td>Group2</td>
<td>OU2</td>
<td>OU1</td>
<td>Grou p2</td>
<td>User2</td>
</tr>
<tr>
<td>6.</td>
<td>Group1</td>
<td>OU1</td>
<td>OU4</td>
<td>OU4</td>
<td>Grou p1</td>
</tr>
<tr>
<td>7.</td>
<td>Group2</td>
<td>OU2</td>
<td>OU5</td>
<td>OU5</td>
<td>Grou p2</td>
</tr>
<tr>
<td>8.</td>
<td>Group3</td>
<td>OU3</td>
<td>Group1</td>
<td>Grou p3</td>
<td>User3</td>
</tr>
</tbody>
</table>
To link a password policy to organizational units and groups

1. On the home page of the Administration site, click the Password Policies tab.
2. Click the One Identity Password Policies link under the application directory partition that you want to manage.
3. On the One Identity Password Policies for <application directory partition> page, click Edit under the policy whose properties you want to view or modify.
4. Click the Policy Scope tab.
5. Click the Add button under This policy is applied to the following organizational units, and then browse for an organizational unit.
6. Click the Add button under This policy is applied to the following groups, and then browse for a group.
7. Click Save.

Changing Policy Priority

When multiple password policies affect an organizational unit or a group, only the policy with the highest priority is applied to such group or organizational unit. A newly created password policy is disabled by default.

**NOTE:** Only priority of policies with the same scope can be changed.

To change policy priority

1. On the home page of the Administration site, click the Password Policies tab.
2. Click the One Identity Password Policies link under the AD LDS instance for which you want to change the policy link order and click Policy priority.
3. In the Change Policy Priority dialog box, move policies up or down in the list by selecting them and clicking the Move Up or Move Down buttons.

Configuring Password Policy Rules

Password Manager for AD LDS uses a set of powerful and flexible rules to define requirements for passwords. Each password policy has rules that are configured independently of the rules in other policies.
NOTE: Password Manager for ADLDS does not support Dictionary rule in OI Password policies.

For each password policy, you can set up the following rules:

- **Password age rule.** Ensures that users cannot use expired passwords or change their passwords too frequently.
- **Length rule.** Ensures that passwords contain the required number of characters.
- **Complexity rule.** Ensures that passwords meet minimum complexity requirements.
- **Required characters rule.** Ensures that passwords contain certain character categories.
- **Disallowed characters rule.** Rejects passwords that contain certain character categories.
- **Sequence rule.** Rejects passwords that contain more repeated characters than it is allowed.
- **User properties rule.** Rejects passwords that contain part of a user account property value.
- **Symmetry rule.** Ensures that password or its part does not read the same in both directions.
- **Custom rule.** Use this rule to enter the settings of the local or domain password policy applied to the server on which AD LDS is running, if you want to display these settings to users on the Self-Service site when users reset or change passwords. You can also use this rule to display your custom messages and to hide the configured policy rules.

### Password Compliance

When you use **Forgot My Password** or **Manage My Passwords** workflow to set or reset the password, you can view the compliance of the password with the configured password policy. You can expand a policy and view the rules set for the policy. When you enter a new password, you can instantly get the feedback about the compliance of the password with the defined rules. A green tick mark against the rules in a policy indicates that the password is in compliance with the rule, and help you to set a compliant password.

You can also view the strength of the password using the Password strength meter, which get displayed as a progress bar when you enter a new password in the **New password** text box. The Password strength meter assess the strength of the password by verifying the password with the configured password policy rules and the basic requirements (one upper case letter, one lower case letter, one numeric value, one special character and minimum of seven characters) for a password. This will help to improve the security of the password. You can enable or disable this feature and configure the Password strength status. For more details see **Customization of Password Strength Meter** on page 205.

The following is a general procedure for configuring the password policy rules.
To configure rules for a password policy

1. On the home page of the Administration site, click the Password Policies tab.
2. Click the <N> One Identity Password Policies link under the AD LDS instance that you want to manage.
3. On the One Identity Password Policies for <application directory partition> page, click the policy whose properties you want to modify, and then click the Policy Rules tab.
4. On the Policy Rules tab, click the rule that you want to configure, and, under the rule’s name, modify the appropriate rule settings.
5. Repeat step 4 for each of the rules that you want to configure for this password policy, and then click Save.

NOTE: Starting from version 5.9.5, if a Password Manager policy is applied, then the Next button remains disabled in the Forgot my password/ Manage My Passwords screen and gets enabled only when all the password manager's policies are met and shows GREEN.

For information about how to configure each of the policy rules, see the sections below.

Password Age Rule

The password age rule ensures that users cannot use expired passwords or change their passwords too frequently.

Specify Minimum password age so that passwords cannot be changed until they are more than a certain number of days old. If a minimum password age is defined, users must wait the specified number of days to change their passwords.

Specify Maximum password age so that passwords expire as often as necessary for your environment.

To configure the password age rule

1. Follow the steps outlined in Configuring Password Policy Rules on page 169.
2. On the Policy Rules tab, click Password Age Rule to expand the rule settings.
3. Under Password Age Rule, select the Specify password age check box, and then specify the following options as required:

Table 18: Password age limit

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum password age</td>
<td>Specifies for how many days users must keep new passwords before they can change them.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Maximum password age</td>
<td>Specifies how many days a password can be used before the user is required to change it.</td>
</tr>
</tbody>
</table>

**Length Rule**

The length rule ensures that passwords contain the required number of characters. Define a minimum length so that passwords must consist of at least a specified number of characters. Long passwords - seven or more characters - are usually stronger than short ones. With this setting, users cannot use blank passwords, and they have to create passwords that are a certain number of characters long.

**To configure the length rule**

1. Follow the steps outlined in Configuring Password Policy Rules on page 169.
2. On the Policy Rules tab, click Length Rule to expand the rule settings.
3. Under Length Rule, select the Password must contain check box, and then specify the following options as required:

<table>
<thead>
<tr>
<th>Table 19: Password length limit</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum characters</td>
<td>Set the minimum number of characters that a password must contain.</td>
</tr>
<tr>
<td>Maximum characters</td>
<td>Set the maximum number of characters allowed in a password.</td>
</tr>
</tbody>
</table>

**Complexity Rule**

The complexity rule ensures that passwords meet the following minimum complexity requirements:

- Not contain the user's account name or parts of the user's full name that exceed two consecutive characters
- Be at least six characters in length
- Contain characters from three of the following four categories:
  - English uppercase characters (A through Z)
  - English lowercase characters (a through z)
  - Base 10 digits (0 through 9)
The complexity rule imposes the same requirements as the standard Windows policy "Password must meet complexity requirements."

**To configure the complexity rule**

1. Follow the steps outlined in Configuring Password Policy Rules on page 169.
2. On the Policy Rules tab, click Complexity Rule to expand the rule settings.
3. Under Complexity Rule, select the Password must meet complexity requirements check box.

**Required Characters Rule**

The required characters rule ensures that passwords contain certain character categories. Required characters are necessary to make a password stronger. For example, if you set the minimum number of uppercase characters to 4, then the password “ElePHant” will be rejected.

**To configure the required characters rule**

1. Follow the steps outlined in Configuring Password Policy Rules on page 169.
2. On the Policy Rules tab, click Required Characters Rule to expand the rule settings.
3. Under Required Characters Rule, select the Password must contain at least check box, and then specify the following options as required:

**Table 20: Required character rules**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alphabetic characters</td>
<td>Set the minimum number of alphabetic characters (A-z) that must appear in a password.</td>
</tr>
<tr>
<td>Lowercase characters</td>
<td>Set the minimum number of lowercase characters that must appear in a password.</td>
</tr>
<tr>
<td>Uppercase characters</td>
<td>Set the minimum number of uppercase characters that must appear in a password.</td>
</tr>
<tr>
<td>Unique characters</td>
<td>Set the number of characters that must be unique within a password. To require case sensitivity for this</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Digits (0-9)        | Specify whether passwords must contain digits:  
  Set the minimum number of digits that must appear in a password by selecting the Minimum check box, and then typing the required number.  
  In the In positions text box, type the numbers of positions within a password where digits must appear. For example, 1,3,5-10.  
  Use Number of ending characters to specify how many digits must be in the end of a password. |
| Special characters  | Specify whether passwords must contain special characters:  
  Set the minimum number of special characters that must appear in a password by selecting the Minimum check box, and then typing the required number.  
  In the In positions text box, type the numbers of positions within a password where special characters must appear. For example, 1,3,5-10.  
  Use Number of ending characters to specify how many special characters there must be in the end of a password.  
  Special characters include the following characters  
  - !"#$%&'()*+,-./:;<=>?@\[\]^_`{}~ |

**Disallowed Characters Rule**

The disallowed characters rule rejects passwords that contain certain character categories.  
The categories include digits from 0-9 and special characters such as “#$%”. If you specify that special characters must not appear in the beginning of a password, then the password “@work” will be rejected.
To configure the disallowed characters rule

1. Follow the steps outlined in Configuring Password Policy Rules on page 169.
2. On the Policy Rules tab, click Disallowed Characters Rule to expand the rule settings.
3. Under Disallowed Characters Rule, select the Password must not contain check box, and then specify the following options as required:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digits (0-9)</td>
<td>Specify whether the rule will reject passwords containing digits. Select the In positions check box, and then type the numbers of positions within a password where digits must not appear. For example, 1,3,5-10. Select the Number of ending characters check box, and then specify how many digits there must not be in the end of a password.</td>
</tr>
<tr>
<td>Special characters</td>
<td>Specify whether the rule will reject passwords containing special characters. Select the In positions check box, and then type the numbers of positions within a password where special characters must not appear. For example, 1,3,5-10. Select the Number of ending characters check box, and then specify how many special characters there must not be in the end of a password. Special characters include the following characters - !#$%&amp;'()*+,-./:;&lt;=&gt;?@]^_`~</td>
</tr>
</tbody>
</table>

### Sequence Rule

The sequence rule rejects passwords that contain more repeated characters than it is allowed.

Repeated characters can appear in succession or in different positions in a password. This policy also includes characters typed in direct or inverse numerical or alphabetical order.
For example, if you set the maximum number of same characters that appear in succession to three, then the password "eeeegle" will be rejected.

**To configure the sequence rule**

1. Follow the steps outlined in Configuring Password Policy Rules on page 169.
2. On the Policy Rules tab, click Sequence Rule to expand the rule settings.
3. Under Sequence Rule, select the Password must not contain more than check box, and then specify the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of characters repeated in succession (AAAB)</td>
<td>Set the maximum number of same characters in a row that the policy will tolerate before rejecting a password.</td>
</tr>
<tr>
<td>Number of identical characters (ABCA)</td>
<td>Set the maximum number of same characters typed in different positions of password that the policy will tolerate before rejecting a password.</td>
</tr>
<tr>
<td>Number of characters in direct or inverse numerical or alphabetical order (ABC_321)</td>
<td>Set the maximum number of characters typed in direct or inverse numerical or alphabetical order that the policy will tolerate before rejecting a password.</td>
</tr>
<tr>
<td>Case sensitive</td>
<td>Select this check box to require case sensitivity for this rule.</td>
</tr>
</tbody>
</table>

**User Properties Rule**

The user properties rule rejects passwords that contain part of a user account property value.

This rule splits the user account property value by non-alphanumeric characters (for example, "_"), and then checks if any part of the value is available in the password. For example, if user’s name is "Peter_US", Password Manager for AD LDS splits the property into: “Peter” and “US”, and checks if any part can be found in the password. For example, the password “US_US” will be rejected.

**To configure the user properties rule**

1. Follow the steps outlined in Configuring Password Policy Rules on page 169.
3. Under User Properties Rule, select the Prevent users from using account properties as part of passwords check box, and then specify the following options:
### Table 23: User properties rule

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| Beginning characters of a user property value | Set the maximum number of beginning characters from a user property value that users are allowed to use as part of their passwords. For example, if a user's full name is “Anna Fairweather”, and the option value is set to 3, then the user is allowed to type the strings “Ann” and “Fai” as part of her password. The password will be rejected if it contains "Anna" or "Fair". You can select from the following user account properties:  
  - displayNamePrintable  
  - mailNickname  
  - userPrincipalName  
  - displayName  
  - title  
  - sn  
  - samAccountName  
  - personalTitle  
  - middleName  
  - mail  
  - givenName  
  - employeeID  
  - cn  
  
  **NOTE:** The administrator can add other user attributes to the existing list of attributes and select to use. Click **Add other attribute to the list** to add other user attributes.                                                                                                                                                                                                                                      |
| The entire value of a user property   | Select to reject passwords containing the entire value of a user property. You can select any of the user account properties listed in the description of the                                                                                                                                                                                                                                                                                                      |
Option | Description
--- | ---
Beginning characters of a user property value option above.
Case sensitive | Select this check box to require case sensitivity for this rule.
Enable bi-directional analysis | Select to reject passwords containing the entire value of a user property or its part (depending on which of the two previous options you have selected), if read backwards.

## Symmetry Rule

The symmetry rule ensures that password or its part does not read the same in both directions.

For example, if you enable the **Reject passwords that read the same in both directions** option, then the password “redivider” will be rejected.

### To configure the symmetry rule

1. Follow the steps outlined in Configuring Password Policy Rules on page 169.
2. On the Policy Rules tab, click **Symmetry Rule** to expand the rule settings.
3. Under **Symmetry Rule**, select the **Password must comply with symmetry criteria** check box, and then specify the following options:

### Table 24: Symmetry criteria

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reject passwords that read the same in both directions (pass8ssap)</td>
<td>Select to reject passwords that are palindromes.</td>
</tr>
<tr>
<td>Maximum number of beginning characters that match ending characters of password if read backwards (pas47sap)</td>
<td>Specify the number of beginning characters matching the ending characters of password, if read backwards, which the policy will tolerate before rejecting a password.</td>
</tr>
<tr>
<td>Maximum number of consecutive characters within a password, that read the same in both directions (pass4554word)</td>
<td>Specify the number of password characters in a row that read the same in both directions, which the policy will tolerate before rejecting a password.</td>
</tr>
<tr>
<td>Case sensitive</td>
<td>Select to define this rule as case sensitive.</td>
</tr>
</tbody>
</table>
Custom Rule

You can use this rule to create your own password policy message to be displayed on the Self-Service site when users change or reset their passwords. For example, use this rule to enter the settings of the local or domain password policy applied to the server on which AD LDS is running.

If you want to hide all other policy messages and display your custom message to users, enable this policy rule, enter the message text, and select the **Hide messages from other policy rules and display only this message** check box. If you do not select this check box, messages from all enabled policy rules will be displayed.

Note, that this rule does not check the password compliance with the configured password policy. Configure this rule to display your custom message instead of or together with other policy messages when users change or reset passwords on the Self-Service site.

To configure the custom rule

1. Follow the steps outlined in Configuring Password Policy Rules on page 169.
2. On the Policy Rules tab, click Custom Rule to expand the rule settings.
3. Under Custom Rule, select the Enable check box to enable this rule.
4. Select the **Hide messages from other policy rules and display only this message** check box if you want users to see only the custom password rule message and hide all other password policy messages.
5. In the text box, enter the rule message in the default language (English). To enter the message in other languages, click the Add new language link, select the language, specify the message and click OK. Note, that only languages of the user interface of the Self-Service site are available in the list.

Deleting a Password Policy

To delete a password policy

1. On the home page of the Administration site, click the Password Policies tab.
2. Click the One Identity Password Policies link under the AD LDS instance that you want to manage.
3. Click Remove under the policy that you want to delete.

**NOTE:** When you delete a password policy, the deleted policy is no longer valid for an AD LDS instance. To restore a deleted password policy, create a new policy and manually configure its settings as required.
One Identity Hybrid Subscription

The newest versions of One Identity's on-premises products offer a mandatory One Identity Hybrid Subscription, which helps you transition to a hybrid environment on your way to the cloud. The subscription enables you to join Password Manager for AD LDS with the One Identity Starling software-as-a-service platform. This gives your organization immediate access to a number of cloud-delivered features and services, which expand the capabilities of Password Manager for AD LDS. When new products and features become available to One Identity Starling, the One Identity Hybrid Subscription allows you to use these immediately for Password Manager for AD LDS to add value to your subscription.
One Identity Starling

Password Manager for AD LDS 5.9.6 supports integration with One Identity Starling services. The Starling Join feature in Password Manager now enables you to connect to One Identity Starling, the Software as a Service (SaaS) solution of One Identity. To use One Identity Starling, you have to purchase One Identity Starling subscription. Each One Identity Starling subscription is registered with a phone number to which the token response for authentication or the push notification is sent. The token generation method is dependent on the method (SMS, Phone call, OTP on Starling 2FA app or push notification) that is enabled for your subscription.

Pre-requisites to configure One Identity Starling

Before you configure Starling using the Password Manager for AD LDS, ensure the following:

- Users must have acquired valid Starling Credentials, such as a Starling Organization Admin account or a Collaborator account associated with the One Identity Hybrid subscription. For more information on Starling, see the One Identity Starling User Guide.

- The Password Manager for AD LDS must be running on the computer where you want to configure Starling.

- The Password Manager for AD LDS must have a managed domain.

To configure One Identity Starling for authentication

1. On the home page of the Administration site, click the One Identity Starling tab.
2. Click Join to Starling. It will redirect to One Identity Starling website. Enter your One Identity Starling credentials to take advantage of connected services like Two-Factor Authentication, Identity Analytics & Risk Intelligence, and more.

   **NOTE:** In case of Password Manager upgrade, you will not be able to see the old subscription key and the configuration details of Starling that were used for Starling Two factor Authentication. You will again have to Join Starling in the One Identity Starling page, with a valid Starling account.
3. After successful verification, you will be redirected to One Identity Starling page on Administration site.

4. After the information is saved, Starling Join status displays.

**NOTE:** If you have a Starling account, when a subscription is created for you, you will receive a Starling invitation email. Click the link in the email and log in to the Starling account.

**NOTE:** If you do not have a Starling account, when a subscription is created for you, you will get a Starling Sign-up email to complete a registration process to create a Starling account. Complete the registration and log in using the credentials that you have provided during registration. For account creation details, see the One Identity Starling User Guide.

5. For Starling Two-Factor Authentication, you can configure user’s phone number in the appropriate Active Directory’s attribute and the same attribute must be configured in **General Settings -> Reinitialization**.

6. In the **Select the attribute of user’s account in Active Directory in which user’s Questions and Answers profile and Corporate phone will be stored** section, configure the attribute of **Corporate phone** field. By default, the attribute value for Corporate phone is mobile.

**Disconnecting One Identity Starling from Password Manager**

To unjoin One Identity Starling, click **Unjoin Starling**. This deletes the joined instances from One Identity Starling services and the Starling Join information from storage. After the unjoin, the initial page displays.

**One Identity Starling Two-factor Authentication for Password Manager**

Since Password Manager manages confidential Password Manager user details in both on-premises and cloud based environments, it is appropriate and safer to have an additional security measure such as the two-factor authentication. Password Manager now supports One Identity’s Starling Two-Factor Authentication service.

The Starling Two-factor authentication provides enhanced security by necessitating users to provide two forms of authentication to Password Manger, namely a user name and password combination along with a token response. The token response is collected through an SMS, Phone call, or push notification received on a physical device such as a mobile or any other device other than the browser.

**Registering to One Identity Starling 2FA**

In order to use Starling 2FA, you must first register to the product. When you register to Starling 2FA using your mobile number, an SMS is delivered with the mobile app download link. Click on the link to access the App Store or Play Store from where you can download the Starling mobile application. Alternatively, you can go to the App Store or Play Store and search and download the Starling.
The following 2FA options are supported:

1. **Push Notification**: After the Starling app is downloaded and registered with user’s email id and mobile number, the user will get a push notification to Approve or Deny Starling Authentication.

2. **Voice**: The user will get a voice call on the registered mobile number and on call user will get an OTP.

3. **SMS OTP**: The user will get an OTP through SMS on the registered mobile number.

4. The user can open starling app and copy paste the code from the Starling app to Password Manager and click on Verify.

**Logging in to Web interface through 2FA authentication**

When a Starling 2FA enabled user tries to log in to the Password Manager Web interface, the user is prompted to enter the Starling Two-factor token response. Based on the option selected by the user, the token response is provided through SMS, Phone Call or Push Notifications.

On entering the token response and after successful verification the Web interface is displayed.

**NOTE:** Push Notification works only if the Starling App is installed on the device with registered mobile number. The link to install the Starling App will be send to your registered mobile number at the time of registering to Starling.

**Enable S2FA for Administrators and Enable S2FA for HelpDesk Users**

This section describes the steps to enable Starling Two-Factor Authentication to protect AD LDS Administration site and Helpdesk site users.

**To enable S2FA for Administrators and HelpDesk Users**

1. On the home page of the AD LDS Administration site, click the One Identity Starling tab.

2. Select **Enable S2FA for Administrators** checkbox to protect the AD LDS Administration site or select **Enable S2FA for HelpDesk Users** checkbox to protect the HelpDesk site with Starling Two-Factor Authentication. Select both checkboxes to enable authentication for both Administration and HelpDesk user sites.

**NOTE:** The Administrator can choose if the user’s mobile, or telephone number, or home phone number, or any other custom set attribute to be used for authentication from the Specify user’s AD attribute for mobile number to authenticate the user dropdown box. The Administrator can also add a custom attribute to the existing list of attributes.
3. Click **Save** to save the settings.

**NOTE:** The Administrator can choose which user’s active directory attributes to be used for the mobile number from the **Specify user’s AD attribute to authenticate the user** dropdown box. The administrator can also specify other user’s active directory attribute for mobile number apart from the list.

**NOTE:** If the administrator unjoins from the Starling, S2FA will stop the protection for AD LDS Administration and HelpDesk sites.

**Failsafe Login**

In case of One Identity Starling downtime situation, a failsafe method is provided by Password Manager to log in. For such case, Password Manager creates a user **qpms2faadmin** to log in. The **qpms2faadmin** user is managed by the administrator.

If the One Identity Starling is down while login to Password Manager, the AD LDS administration site prompts for user credential. The Administrator must provide the password for the **qpms2faadmin** user to authenticate and login to the AD LDS administration site.
Reporting

Reporting and User Action History Overview

Best Practices for Configuring Reporting Services

Reporting and User Action History Overview

Password Manager for AD LDS provides a simple and convenient way to view, print, and save reports and charts allowing you to analyze information on how the application is used. The reporting functionality within the solution is based on Microsoft SQL Server Reporting Services as a common reporting environment.

The Reports section of the Administrator site includes a number of pre-defined reports that help you perform the following tasks:

- Track user registration activity
- Analyze information about what actions are performed by users in Password Manager for AD LDS
- Check users’ registration status
- View a list of users whose Questions and Answers profiles must be updated to comply with the current administrator-defined settings
- Track helpdesk operators’ activity

The user action history provides records of all actions performed by users registered with Password Manager for AD LDS. You can search for records using a full-text search functionality. The user action history is provided by Enterprise Auditing Service embedded in Password Manager for AD LDS.

To use Password Manager for AD LDS reports, you need to connect to an SQL Server and a Report Server.

To use the user action history functionality, you need to connect to an SQL Server only.
Alternative options
You can use predefined Power BI templates to generate interactive reports as an alternative to Reporting. For more information on Power BI, see Working with Power BI.

Setting Up Reporting Environment

To enable the reporting functionality of Password Manager for AD LDS, ensure that the following requirements are met:

- A SQL Server is deployed in your environment and the Password Manager for AD LDS database is configured on that server.
- A SQL Server Reporting Services report server is installed in your working environment.
- You have configured a connection to the report server through the Administration site.

The interactive Web-based reports are built on data that the report server retrieves from the Password Manager SQL database, and can be either viewed online or exported into multiple file formats.

Using Reports

You can create and view reports interactively using the Administration site, and save them to multiple file formats.

To use the reporting functionality, you have to specify the SQL Server to store the Password Manager database and connect to the Report Server that is capable of building reports using the data stored in the Password Manager database.

When specifying the SQL Server and the database to store the log data, ensure that the account under which Password Manager for AD LDS will access the server has the appropriate permissions to create and write to a database on the server.

When connecting to a report server for the first time, Password Manager for AD LDS publishes the reports included with the solution to the server, and populates the list of reports on the Administration site. Before connecting to a report server, ensure that the account under which Password Manager for AD LDS will access the server has the appropriate permissions to publish the Password Manager for AD LDS reports. The administrative rights on the report server will be sufficient for this account to publish reports.

To configure Password Manager reports

1. On the home page of the Password Manager Administration site, click Reporting.
2. On the Statistics page, click the Reports link under the Reporting and User Action History title.

4. In the SQL Server Connection Settings dialog box, specify the following settings and click Next.

Table 25: SQL server connection settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SQL Server</td>
<td>Type the name of the SQL Server to be used for storing the Password Manager database.</td>
</tr>
<tr>
<td>Database name</td>
<td>Specify the name for the database where Password Manager for AD LDS will log information used for building reports.</td>
</tr>
<tr>
<td></td>
<td>If the database you specified does not yet exist, you will be prompted to confirm creation of the database.</td>
</tr>
<tr>
<td></td>
<td>When prompted, select the account for creating the database. This account must have the permission to create a database.</td>
</tr>
<tr>
<td>Select account for connecting to the SQL Server</td>
<td>To have Password Manager access the SQL Server under the Password Manager Service account, select Password Manager Service account. Otherwise, select Specific SQL Server account, and then enter user name and password of the user account you want Password Manager for AD LDS to use when accessing the SQL Server.</td>
</tr>
<tr>
<td></td>
<td>Note, that the account you select must have the permissions to write to the database.</td>
</tr>
</tbody>
</table>

5. In the Report Server Connection Settings dialog box, specify the following settings and click OK:

Table 26: Report server connection settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Server URL</td>
<td>Type in the URL address of the Report Server in the following format: http://&lt;server_name&gt;/&lt;report_server&gt;, where &lt;server_name&gt; is the name of the server where Report Server</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Report Manager URL</td>
<td>Type in the URL address of the Report Manager in the following format: http://&lt;server_name&gt;/&lt;report_server&gt;), where &lt;server_name&gt; is the name of the server where Report Server resides, &lt;report_server&gt; is the name of the Report Manager instance. This is an optional setting.</td>
</tr>
<tr>
<td>Specify the account for deploying SSRS reports</td>
<td>Enter user name and password of the user account you want Password Manager for AD LDS to use when accessing the Report Server. This account must have the permissions to deploy reports.</td>
</tr>
<tr>
<td>Specify the account that the Report Server will use to connect to the data source</td>
<td>Enter user name and password of the user account you want the Report Server to use when accessing the data source. You can use either Windows credentials or SQL Server credentials. If you choose Windows credentials, select the <strong>Use as Windows credentials when connecting to the data source</strong> check box as well. The account you select must have the permissions to read data from the database.</td>
</tr>
</tbody>
</table>

**To create and preview a report**

2. On the Reports page, click the report you want to view. The following table lists the reports included with Password Manager for AD LDS:

   **Table 27: Reports and user action history**

<table>
<thead>
<tr>
<th>Report name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User status (table)</td>
<td>This is a table report displaying a list of users in the managed application directory partitions, and the states of the users’ Questions and Answers</td>
</tr>
<tr>
<td>Report name</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>User status (pie chart)</strong></td>
<td>This is a pie chart showing the percentage of the total number of users for each of the Q&amp;A profiles states.</td>
</tr>
<tr>
<td><strong>Actions by user (table)</strong></td>
<td>This is a table report showing what actions each of the users performed in Password Manager for AD LDS, and whether the result of a user action was successful or not. You can view this report for a specified period of time.</td>
</tr>
<tr>
<td><strong>Actions by user (pie chart)</strong></td>
<td>This is a pie chart displaying the percentage of the total number of user actions for all types of user actions such as registration with Password Manager for AD LDS or password reset. You can view this report for a specified period of time.</td>
</tr>
<tr>
<td><strong>Registrations by month (bar chart)</strong></td>
<td>This is a bar chart showing the monthly numbers of users registered with Password Manager for AD LDS. You can view this report for a specified month range.</td>
</tr>
<tr>
<td><strong>Actions by month (bar chart)</strong></td>
<td>This is a barchart showing the monthly numbers of user actions performed in Password Manager for AD LDS. You can view this report for a specified month range.</td>
</tr>
<tr>
<td><strong>Actions by type (table)</strong></td>
<td>This is a table report showing a summary of user actions in Password Manager for AD LDS sorted by action type. You can view this report for a specified period of time.</td>
</tr>
<tr>
<td><strong>Help desk usage by actions (table)</strong></td>
<td>This is a table report showing a summary of actions on the Helpdesk site. You can view this report for a specified period of time.</td>
</tr>
</tbody>
</table>
### Report name | Description
--- | ---
Help desk usage by operators (table) | This is a table report showing what actions each of the helpdesk operators performed in Password Manager for AD LDS, and whether the result of an operator action was successful or not. You can view this report for a specified period of time.
Help desk usage by users (table) | This table report shows what actions each helpdesk operator has performed for specific users. You can view this report for a specified period of time.
E-mail notifications by user (table) | This table report lists the e-mail notifications sent to specific users. You can view this report for a specified period of time.
E-mail notifications by type (table) | This is a table report showing a summary of e-mail notifications sent to users. The notifications are sorted by action type. You can view this report for a specified period of time.

**IMPORTANT:** To view Password Manager for AD LDS reports, the account used to view reports must have permissions to read data from the report server database. By default, Windows integrated authentication is used to access the report server database. If you want to change access settings to the report server database, edit the appropriate settings on the Report Server.

3. Once the report is generated, it is displayed in the Report Viewer, in a new browser window.
4. Select the zoom ratio in the drop-down list on the toolbar.
5. To go to a particular page, type in a page number in the leftmost text box on the toolbar and press ENTER, or use the navigation arrows beside this text box.
6. To modify report parameters, set the new parameter values by using the group of controls in the upper area of the Report Viewer, and then click the **View Report** button.
7. To close the Report Viewer and return to the **List of Reports** page, simply close the Report Viewer window.

When previewing a report, you can easily locate specific records, or find certain values within the report. The Report Viewer finds each occurrence of the item you are looking for.
To search a report

1. Enter the text you are looking for in the Find Text text box on the menu bar.
2. Click Find.
3. Click Next to find the next occurrence.

In the Report Viewer, you can also save the report in a file, or print the report.

To save a report, select the target file format from the Select a format drop-down list on the menu bar, and then click Export. The Report Viewer supports the following file formats:

- XML file (.XML)
- Microsoft Excel Comma Separated Values file (.CSV)
- TIFF file (.TIFF)
- Portable Document Format (.PDF)
- Web archive file (.MHTML)
- Microsoft Excel Worksheet (.XLS)

To print a report, click the printer icon on the menu bar, and in the Print window, click OK.

User Action History

User action history is a history of all actions performed by all users registered with Password Manager for AD LDS. This functionality is provided by the Enterprise Auditing Service. This service is installed during Password Manager for AD LDS installation and does not require any configuration.

To view user action history, you need to add a connection to SQL Server.

To connect to SQL Server

1. On the home page of the Password Manager Administration site, click Reporting.
2. On the Statistics page, click the History link under the Reporting and User Action History title.
3. On the History page, click Connect to SQL Server.
4. In the SQL Server Connection Settings dialog box, specify the following settings and click OK.

Table 28: SQL server connection settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SQL Server</td>
<td>Type the name of the SQL Server to be used for storing the Password Manager database.</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Database name</td>
<td>Specify the name for the database where Password Manager for AD LDS will log information used for building reports. If the database you specified does not yet exist, you will be prompted to confirm creation of the database. When prompted, select the account for creating the database. This account must have the permission to create a database.</td>
</tr>
</tbody>
</table>

Select account for connecting to the SQL Server  
To have Password Manager access the SQL Server under the Password Manager Service account, select **Password Manager Service account**. Otherwise, select **Specific SQL Server account**, and then enter user name and password of the user account you want Password Manager to use when accessing the SQL Server.  
Note, that the account you select must have the permissions to write to the database.

After you connect to SQL Server, you can perform full-text search for various user actions by user names, emails, activity names, etc.

On the History page of the Administration site, enter a value you want to search for and click **Search**. You can sort the search results by relevance or date. To search for actions performed by John Doe for example, enter **John Doe**.

## Managing Connections to SQL Server and Report Server

On the Reporting page of the Administration site, you can edit or remove existing connections to SQL and Report Servers.

To edit connections, under **Reporting and User Action History**, click the **Edit Connections** link and specify required values.

To remove connections, under **Reporting and User Action History**, click the **Disconnect Servers** link. Note, that all existing connections will be removed.
Best Practices for Configuring Reporting Services

This section provides instructions on how to configure the Reporting Services component. SQL Server Reporting Services component builds reports using the data that SQL Server stores in the Password Manager database. This database must be configured on the SQL Server.

SQL Server Reporting Services allows you to create and view reports that provide statistical data on how Password Manager for AD LDS is used, for example how many users have created their Questions and Answers profiles, how many users need to update their Questions and Answers profiles, what actions each user or helpdesk operator has performed in Password Manager for AD LDS, etc.

The following topics are covered:

- Reporting Services default configuration
- Reporting Services authorization issues
- Reporting Services firewall issues

Reporting Services Default Configuration

The SQL Server Reporting Services component and the Management Tools component must be installed in order to use the Password Manager Reporting functionality. Make sure you select the required features when running the Microsoft SQL Server Setup.

Use the Reporting Services Configuration tool to configure SQL Server Reporting Services. If you installed a report server using the **Install but do not configure the server** option, you must use this tool to configure the server prior to using it. If you installed a report server using the **Install the default configuration** option, you can use this tool to verify or modify the settings that were specified during setup.

It is recommended to select the **Install the default configuration** option during SQL Server and Reporting Services setup on the Report Server Installation Options page of the Setup Wizard. In most cases this will save you much time and effort as long as Reporting Services default configuration is concerned.

Reporting Services Configuration tool can be used to configure a local or a remote report server instance. You must have local system administrator permissions on the computer that hosts the report server you want to configure.

**NOTE:** Please note that remote data sources are not supported by SQL Server Reporting Services included in Microsoft SQL Server Express Edition.
To configure the Reporting Services default configuration

1. Start the Reporting Services Configuration tool.
2. Enter the SQL Server machine name and the Report Server Instance name and then click Connect.

**IMPORTANT:** Sequentially configure the Report Server options listed in the left pane of the Reporting Services Configuration tool. There must not be any Not configured options after the configuration is finished.

4. Click New to create a new virtual directory. This opens a dialog box with the default settings entered. To accept the default settings click OK.
5. Click Apply.
6. Check the Apply default settings checkbox and click Apply.
7. Open the Report Manager Virtual Directory Settings section.
8. Click New to create a new virtual directory. This opens a dialog box with the default settings entered. To accept the default settings click OK.
9. Click Apply.
10. Open the Web Service Identity section.
11. Click Apply to accept the default application pool names for the Report Server and the Report Manager
    - OR -
    Click New to specify your own application pool names.
12. Click Apply.

The Reporting Services feature requires an SQL Server database (different from the Password Manager database) to store report server service data.

You can create the report server database in the following ways:

- Automatically through Setup, if you choose the default configuration installation option in the SQL Server Installation Wizard, by selecting the Install the default configuration option in the Report Server Installation Options page.
- Manually through Reporting Services Configuration tool.

To create a report server database

1. Start the Reporting Services Configuration tool and connect to the report server instance you want to configure (the default instance name is MSSQLSERVER for SQL Server and SQLEXPRESS for SQL Server Express Edition).
2. In the Database Setup page, click Connect. This opens a SQL Server Connection dialog box.
3. Type the name of the SQL Server database engine you want to use.
4. Select the type of credentials used to connect to the SQL Server. You can specify a SQL Server login or use your credentials. The credentials you specify must have permission to log on to the server. Click OK.

5. In the **Database Setup** page, click **New**. This reopens the SQL Server Connection dialog box.

6. Type the name of the SQL Server database engine and select credentials. The credentials you specify must have permission to create a database.

7. Type the name of the report server database. A temporary database is created along with the primary database.

8. Choose the language to use, and then click **OK**.

9. In the **Database Setup** page, specify the credentials used by the report server to connect to the report server database.
   - Select the **Service credentials** option to use the Windows service account and Web service account to connect through integrated security.
   - Select the **Windows credentials** option to specify a domain user account. A domain user account must be specified as `<domain>\<user>`.
   - Select the **SQL Server credentials** option to specify a SQL Server login.

10. Click **Apply**.

A report server database can be created on a local or on a remote SQL Server database engine instance.

When you finish the Report Server configuration please restart the Report Server instance for the changes to take effect. You can restart the Report Server by sequential clicking the **Stop** button and then the **Start** button at the **Server Status** tab of the Reporting Services Configuration tool. If the configuration is performed correctly, the Initialization will be successfully passed for the Report Server instance.

Follow this checklist to verify Password Manager reporting functionality configuration and settings.

<table>
<thead>
<tr>
<th>Table 29: Reporting functionality configuration and settings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step</strong></td>
</tr>
<tr>
<td>Ensure that MS SQL Server with the Reporting Services component is installed and configured.</td>
</tr>
<tr>
<td>Install Password Manager for AD LDS and its components.</td>
</tr>
<tr>
<td>Ensure that the <strong>DefaultAppPool</strong>, <strong>PMAdminADLDS</strong>, <strong>PMUserADLDS</strong>, <strong>PMHelpdeskADLDS</strong>, and <strong>ReportServer</strong> application pools are running in the <strong>IIS Manager</strong> on the Password Manager and the Report Services servers. If any of these</td>
</tr>
<tr>
<td>Step</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>pools are not running – start them manually.</td>
</tr>
</tbody>
</table>

Ensure that the **Default Web Site** is running in the **IIS Manager** on the Password Manager and the Report Services servers. If the web site is not running – start it manually.

Connect to the Reporting Services server through Password Manager Administration site.

The interactive Web-based reports are built using the data that the report server retrieves from the Password Manager SQL database.

For more information on Reporting Services setup and configuration, refer to SQL Server documentation.

**Reporting Services Firewall Issues**

If Password Manager for AD LDS fails to operate properly when Reporting Services are separated from Password Manager for AD LDS by a firewall, specific ports should be open in the firewall.

To get the complete list of Password Manager for AD LDS server port numbers, that have to be open for the application to function properly, see [Appendix B: Open Communication Ports for Password Manager for AD LDS](#) on page 200.
Appendix A: Accounts Used in Password Manager for AD LDS

The following accounts can be used in Password Manager for AD LDS:

- Password Manager Service account
- Application pool identity
- Access account for AD LDS
- Password policy account
- Account for One Identity Quick Connect

Password Manager Service Account

Password Manager Service account is used to install Password Manager for AD LDS. For Password Manager for AD LDS to run successfully, Password Manager Service account must be a member of the Administrators group on the Web server where Password Manager for AD LDS is installed.

Application Pool Identity

Application pool identity is an account under which the application pool's worker process runs. The account you specify as the application pool identity during Password Manager for AD LDS setup will be used to run Password Manager Web sites.

Application pool identity account must meet the following requirements:

- This account must be a member of the IIS_IUSRS local group on the Web server in IIS 7.0.
- This account must have permissions to create files in the <Password Manager for AD LDS installation folder>\App_Data folder.
- Application pool identity account must have full control permission set for the following registry keys: HKEY_LOCAL_MACHINE\SOFTWARE\One Identity\Password Manager for AD LDS.
Access Account for Application Directory Partition Connection

When you connect to an AD LDS instance, you can create a new connection or use existing connections, if any. When creating the connection, you must specify an access account - an account under which Password Manager will access the AD LDS instance and a specified application directory partition. You can use the Password Manager Service account, an Active Directory account or an AD LDS account. These accounts must have the following minimum set of permissions:

- Membership in the *Domain Users* group (for the Password Manager Service account and the Active Directory account)
- Membership in the *Readers* group in the application directory partition (for the AD LDS account)
- Membership in the *Administrators* group in the configuration directory partition
- The Read permission for all attributes of user objects
- The Write permission for the following attributes of user objects: `pwdLastSet`, `comment`, `unicodePwd`, `lockoutTime`, `msDS-UserAccountDisabled`
- The right to reset user passwords
- The permission to create user accounts and containers in the Users container
- The Read permission for attributes of the `organizationalUnit` object and container objects
- The Write permission for the `gpLink` attribute of the `organizationalUnit` objects and container objects
- The Read permission for the attributes of the container and `serviceConnectionPoint` objects in Group Policy containers
- The permission to create container objects in the *System* container
- The permission to create the `serviceConnectionPoint` objects in the *System* container
- The permission to delete the `serviceConnectionPoint` objects in the *System* container
- The Write permission for the keywords attribute of the `serviceConnectionPoint` objects in the *System* container

If you want to use the same connection in password policies as well, make sure the account has the following permissions:

- The Read permission for attributes of the `groupPolicyContainer` objects.
- The Write permission to create and delete the `groupPolicyContainer` objects in the System Policies container.
- The permission to create and delete container and the `serviceConnectionPoint` objects in Group Policy containers.
- The Read permission for the attributes of the container and serviceConnectionPoint objects in Group Policy containers.
- The Write permission for the serviceBindingInformation and displayName attributes of the serviceConnectionPoint objects in Group Policy containers.

Corporate Authentication

In the Register workflow, if the Admin selects Corporate authentication check box, user will only be able to review the corporate account details while registration. If Allow user to edit corporate details check box is selected, user will be able to update the respective corporate details such as Corporate email and Corporate phone number, provided that the details are not previously populated by administrator in the AD.

If Corporate authentication registration mode is selected in the Register activity, make sure that Domain management account has the following set of permissions.

1. The read permission for Corporate email attribute and Corporate phone attribute where, Mobile is the default attribute for the Corporate phone.
2. If Allow user to edit corporate details checkbox is selected under Corporate authentication check box, both Read and Write permission must be available for Corporate email attribute and Corporate phone attribute, where Mobile is the default attribute for the Corporate phone.

**NOTE:** If the Corporate phone attribute under Reinitialization page is a custom value(say, pager) then, the Read/Write Permissions need to be provided for that attribute instead of the mobile attribute.

Account for Using One Identity Quick Connect

You can configure cross-platform password synchronization using One Identity Quick Connect. If used in conjunction with Quick Connect Sync Engine, Password Manager for AD LDS allows you to enable users and helpdesk operators to manage their passwords across a wide variety of connected systems.

To enable Password Manager for AD LDS to set passwords in connected systems, the account used to access Quick Connect must be a member of the local administrators group on the Quick Connect server.

For more information on using Quick Connect with Password Manager for AD LDS, see Reset Password in AD LDS and Connected Systems on page 98.
Appendix B: Open Communication Ports for Password Manager for AD LDS

This section provides a list of communication ports that need to be open in the firewall for Password Manager for AD LDS to function properly.

Administration Site

- Port **80** (Default HTTP) TCP Inbound
- Port **443** (Default HTTPS) TCP Inbound/Outbound
- Port **8081** TCP Inbound/Outbound
- Port **25** (Default SMTP port) TCP Outbound
- Port **135** TCP Inbound/Outbound

Legacy Self-Service site and Password Manager Self-Service site

The Password Manager Self-Service site has all functionality similar to the Legacy Self-Service site with a new and improved user interface. The Password Manager Self-Service site can co-exist along with the already existing Legacy Self-Service site and it is possible to revert at any time to the Legacy Self-Service site.

Helpdesk Sites

- Port **80** (Default HTTP) TCP Inbound
- Port **443** (Default HTTPS) TCP Inbound/Outbound
- Port **8081** TCP Inbound/Outbound
Password Manager Service

- Port **53** (Outgoing DNS lookups) UDP Outbound
- Port **88** (Kerberos Authentication) TCP/UDP Outbound
- Port **389** (LDAP Access) TCP/UDP Outbound
- Port **636** (LDAP Access) TCP Outbound
- Port **137** (NetBIOS Name Service) TCP Outbound
- Port **139** (NetBIOS Session Service) TCP Outbound

SQL Server

- Port **1433** (SQL Server) TCP/UDP Outbound
- Port **1434** (SQL Server Browser Service) TCP/UDP Outbound

Report Server

- Port **80** (SQL Server Report Services) TCP Outbound

Email Notification

- Port **25** (Default SMTP port) TCP Outbound

One Identity Quick Connect Sync Engine

- Port **808** TCP Outbound

Telesign

- Port **443** TCP Outbound
Defender

- Port specified in the activity settings (Authenticate with Defender) is used
Appendix C: Customization Options Overview

There are multiple ways to customize the Self-Service and Helpdesk sites. You can customize email notifications, change company and product logos and Web sites color scheme, etc.

The following customization options are available in Password Manager for AD LDS:

- Customization of steps in Self-Service and Helpdesk tasks
- Email notification customization
- User agreement customization
- Account search options customization
- Web interface customization
- Customization of Password Policies List
- Customization of Password Strength Meter

Customization of Steps in Legacy Self-Service site, Password Manager Self-Service site, and Helpdesk Tasks

The Password Manager Self-Service site has all functionality similar to the Legacy Self-Service site with a new and improved user interface. The Password Manager Self-Service site can co-exist along with the already existing Self-Service site and it is possible to revert at any time to the Legacy Self-Service site.

You can change the steps and the order of steps in self-service and helpdesk tasks by modifying the workflows that correspond to these tasks. For example, to modify the Forgot My Password task on the Self-Service site you need to modify the Forgot My Password workflow on the Administration site.

A workflow consists of activities; each activity can be configured independently of other activities. Almost each activity corresponds to a single step in a task, that is a single page in the wizard a user goes through to complete the task.

By adding and removing activities and changing activities’ order in a self-service workflow you can define what wizard pages and in what order users will go through when performing a task on the Self-Service site. The same applies to the Helpdesk site and helpdesk workflows.

To edit a workflow, open the workflow on the Administration site and add or remove activities in the workflow designer.
For more information on configuring workflows, see Workflow Structure on page 78.
For more information on modifying self-service workflows and activities, see Legacy Self-Service or Password Manager Self-Service site workflows
For more information on modifying helpdesk workflows and activities, see Helpdesk Workflows on page 108.

Email Notification Customization

By adding the notification activities into a workflow, you can send notifications to users and administrators about successful or failed workflows. The following notification activities are available:

- Email user if workflow succeeds
- Email user if workflow fails
- Email administrator if workflows succeeds
- Email administrator if workflow fails

Password Manager for AD LDS offers user notification templates for all predefined workflows in 16 languages. You can customize the notification template by editing the Email user if workflow succeeds and Email user if workflow fails activities.

Templates are not provided for administrator notifications. To create administrator notifications, edit the Email administrator if workflows succeeds and Email administrator if workflow fails activities.

If you want to send email notifications in other languages, you can add more languages to the language list for the required notifications.

For more information on customizing email notifications, see Customizing Notifications on page 105.

User Agreement Customization

In any self-service task Password Manager for AD LDS allows you to include a page with an end-user agreement. You can use it to obtain users’ consent to store their personal information that may be available in their Questions and Answers profiles.

To this, add the Display user agreement activity to required workflows. When configuring this activity, you can use the predefined end-user agreement template or create your own. You can also specify the agreement text in several languages. The default agreement text template is available in 16 languages.

For more information on configuring the end-user agreement, see Display User Agreement on page 104.
Account Search Options Customization

Account search options allow you to customize the Find Your Account page of the Self-Service site. You can allow users to search for their accounts on the Self-Service site or turn off the search options and require them to enter their logon names.

If you allow users to search for their accounts, you can specify how many user accounts and what user properties will be displayed in search results.

To configure account search options, on the Administration site, open General Settings and click the User Identification tab.

For more information on account search options, see Search and Logon Options on page 130.

Web Interface Customization

Using Password Manager Administration site, you can customize the Web interface of the Self-Service and Helpdesk sites, i.e. change company and product logos and modify the sites’ color scheme.

To customize the Web interface of the Self-Service and Helpdesk sites, on the Administration site, open General Settings and click the Web Interface Customization tab.

For more information, see Web Interface Customization on page 146.

Customization of Password Policies List

When a user changes or resets password on the Self-Service site, the password policy rules specified for the user's application directory partition can be displayed on the page where the user is required to enter a new password.

To modify the list of password policy rules displayed on the Self-Service site, edit the rules specified for the application directory partition on the Password Policies tab of the Administration site.

For more information, see Configuring Password Policy Rules on page 169.

Customization of Password Strength Meter

You can customize the Password strength meter on the Helpdesk site and Self-Service site.
To enable Password strength meter:

- In the web.config file, set the value of PasswordStrengthMeterEnable to true as follows:

```xml
<appSettings>
  <add key="PasswordStrengthMeterEnable" value="true"/>
</appSettings>
```

To disable Password strength meter, set the value of PasswordStrengthMeterEnable to false.

You can customize the text displaying the strength of the Password strength meter.

To customize the text:

- In the Common.xml file present in the LocalizationStorage folder, you can modify values in the Resource Ids to display the required text:

```xml
<Resource Id="PasswordStrengthMeter.Text">
  <Value><![CDATA[Password strength:]]></Value>
</Resource>

<Resource Id="PasswordStrengthMeter.VeryWeak">
  <Value><![CDATA[Very weak]]></Value>
</Resource>

<Resource Id="PasswordStrengthMeter.Weak">
  <Value><![CDATA[Weak]]></Value>
</Resource>

<Resource Id="PasswordStrengthMeter.Good">
  <Value><![CDATA[Good]]></Value>
</Resource>

<Resource Id="PasswordStrengthMeter.Strong">
  <Value><![CDATA[Strong]]></Value>
</Resource>

<Resource Id="PasswordStrengthMeter.VeryStrong">
  <Value><![CDATA[Very strong]]></Value>
</Resource>
```

For more information, see Password Compliance.
**Glossary**

**A**

**Account**
A record that consists of all the information that defines a user to Active Directory or AD LDS. This includes the user name and password required for the user to log on, the groups in which the user account has membership, and the rights and permissions the user has for using the computer and network and accessing their resources.

**Administration site**
A website for Password Manager administrators. On this website, they can configure Management Policies by adding managed application directory partitions, creating question lists, specify Q&A policy, etc.

**Application directory partition alias**
Enter the name that will be used to address the application directory partition on the Self-Service and Helpdesk sites.

**Application log**
The log that lists all actions performed by Password Manager for AD LDS.

**Attribute**
A piece of data that stores information that is specific to an object. A set of attributes stores the data that defines an object.

**C**

**Certificate**
A certificate is used to encrypt traffic and provide authentication between Password Manager Service and web sites installed on different servers. View more.

**Configuration storage account**
An account used by Password Manager for AD LDS for storing its configuration data i.e. settings configured in Password Manager for AD LDS, for example Management Policies, general settings, etc. The configuration storage account is automatically created in the Users container of a managed application directory partition when the
managed partition is added. The configuration storage account is named QPMStorageContainer.

**Custom activity**

Custom activity is an activity with PowerShell handlers. Create custom activities from scratch or convert built-in activities to custom. [View more.]

**Custom password policy rule**

This rule does not check the password compliance with the configured password policy. Configure the rule to display your custom message instead of or together with other policy messages.

**E**

**Encryption algorithm**

This algorithm is used to encrypt users’ answers to secret questions. Users’ answers will be encrypted if the “Store answers using reversible encryption” option is selected in the Q&A profile settings. Otherwise, the answers will be hashed.

**F**

**Find**

Provide regular expression based on the selected Active Directory attribute to find a matching pattern in the target system.

**G**

**Group Policy**

An administrator’s tool for defining and controlling how programs, network resources, and the operating system operate for users and computers in an organization.

**H**

**Hashing algorithm**

This algorithm is used to hash users’ answers to secret questions if reversible encryption is not used to store the answers.
**Helpdesk site**

A website for helpdesk operators. On this website, they can reset users’ passwords, unlock accounts, assign temporary passcodes, etc.

**I**

**In-place upgrade**

The installation of the latest version of Password Manager without removing the older version.

**L**

**Locked Questions and Answers Profile**

A Questions and Answers Profile that temporarily cannot be used.

A Questions and Answers Profile can become locked after a number of unsuccessful attempts to answer the questions.

**M**

**Mailbox**

The delivery location for all incoming mail messages addressed to a designated owner. Information in a user’s mailbox is stored in the private information store on a Microsoft® Exchange server computer. A mailbox can contain received messages, message attachments, folders, folder hierarchy, and more. Server applications for Microsoft® Exchange server are often designed with a mailbox for communication.

**Mandatory question**

A question, the same for all users in an application directory partition, that users must answer in order to authenticate themselves using Password Manager for AD LDS.

**Management Policy**

Management Policy allows you to configure workflows and secret questions for specified groups of users, and select helpdesk operators to manage these users. See [Management Policy Components](#).
Optional question

A question that users should select from a list of pre-defined questions and answer to authenticate themselves using Password Manager for AD LDS.

Password Manager realm

Realm is a set of Password Manager Service instances sharing realm settings and configuration. You can use the realm to provide enhanced availability and load balancing.

Password Manager Service Account

An account used to install Password Manager. The Password Manager Service account must be a member of the Administrators group on the Web Server where Password Manager for AD LDS is installed.

Password Policy Manager

A component of Password Manager for AD LDS that enforces password policies configured in Password Manager for AD LDS, when users change their passwords using tools other than Password Manager for AD LDS.

Questions and Answers Profile (Q&A Profile)

A set of questions selected by a user from the Question list and user's answers to them. A Questions and Answers Profile is used to authenticate a person using Password Manager for AD LDS.

Question list

A set of questions used in creating users' Questions and Answers profiles. The list is defined by the administrator and contains a series of questions in a certain language that users from a specific application directory partition must answer in order to create or update their personal Questions and Answers profiles. A question list defines the number of questions of each type and the wording of mandatory and optional questions.
R

Replace

Provide a value to replace the matched pattern in the target system.

S

Self-Service site

A website for Password Manager for AD LDS end-users. On this site, end-users can create their Questions and Answers Profiles and manage their passwords.

Special character

A character that is neither alphabetic nor numeric.

T

Test attribute value

Provide a sample Active Directory attribute value, to evaluate the matching pattern.

U

User-defined question

A question that users must provide along with the answer in order to authenticate themselves using Password Manager for AD LDS.

W

Workflow availability (helpdesk)

If a user is not registered, then only Reset Password, Unlock Account, and Assign Passcode workflows are enabled. For more information, see Workflow Settings.

Workflow availability (self-service)

If a user is not registered, only My Questions and Answers Profile and I Have a Passcode workflows are enabled. For more information, see Workflow Settings.
One Identity solutions eliminate the complexities and time-consuming processes often required to govern identities, manage privileged accounts and control access. Our solutions enhance business agility while addressing your IAM challenges with on-premises, cloud and hybrid environments.

Contacting us

For sales or other inquiries, visit https://www.oneidentity.com/company/contact-us.aspx.

Technical support resources

Technical support is available to One Identity customers with a valid maintenance contract and customers who have trial versions. You can access the Support Portal at https://support.oneidentity.com/.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos at www.YouTube.com/OneIdentity
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product