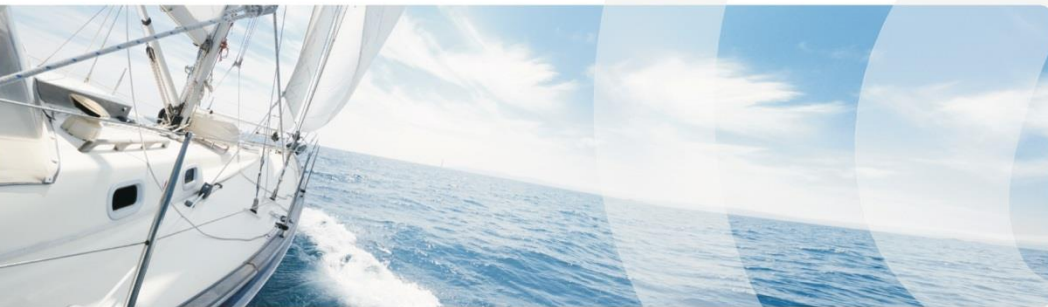


**first@ttribute**



**Active Directory**  
Software, Service & Consulting

[www.firstattribution.com](http://www.firstattribution.com)

## **FirstWare IDM-Portal FreeEdition**

Quick Start Guide

**Version 2016.0**

Last update: December 14, 2015

## Overview

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# 1 Introduction

Thank you for your interest in FirstWare IDM-Portal FreeEdition. IDM-Portal FreeEdition is a free Identity Management Tool for Active Directory networks. We want to motivate you to use the potential of your Active Directory. It can be an easy slim solution for many issues.

Install FirstWare IDM-Portal FreeEdition within a few minutes and use it in your company free of charge. The software immediately offers you added value when it comes to basic Identity Management and Permission Management tasks in Active Directory.

Provide a Self Service Portal for your users and let them maintain the attributes of their own AD accounts (eg. phone number, department,... ). In the same way people can use it as an intranet phone book to search for phone numbers or email addresses.

As an admin you can maintain user and group data using with both, the “Local Installation“ and the “Web Server Installation“. Read more about it here: [System](#).

We developed FirstWare IDM-Portal FreeEdition to simplify Active Directory Management as much as possible. Non-IT users should also be able to understand and use the software without reading handbooks.

If you have ideas or comments to improve the software, we will be happy to get your message.

## FirstWare IDM-Portal FreeEdition helps you to:

- Simplify administration
- Standardize the maintenance of attributes
- Delegate user and group management to non-IT staff
- Set up a Self Service Portal for your users
- Provide an intranet phone book

FreeEdition

Users Groups Config About

DAC\adm.rudolph

Marquette, Isabelle [isabelle.marquette]

General Group Membership

Identity

First Name\* Isabelle

Last Name\* Marquette

Display Name Marquette, Isabelle

Upload Photo

Active Directory Container

Container\* OU=Lyon,OU=FR,OU=ORG,DC=dac,DC=local

Account Properties

Logon Name\* isabelle.marquette

Password\*

Description

Employee Number 10239847

Employee Type Internal

Account expires <never>

User must change password ☒

Addresses

Company DAC Europe AG

Department Human Resources

Street 20 Rue Jean-Luc Cardin

ZIP City 69003 Lyon

State

Country Frankreich

Telephone / Mail

Mobile 555-781-2347

Telephone 555-999-625414729824

Fax 555-144-2568

Mail isabelle.marquette@dac.com

Delete Save Cancel

License: FreeEdition © 2014 FirstAttribute AG

Screenshot: User Management

## 2 System Requirements

For the use of FirstWare IDM-Portal FreeEdition you need a functioning Active Directory, based on Windows Server 2008 or higher. The software accesses your AD directly using the LDAP protocol. There are no additional components, such as databases required.

You can choose between two installation types:

### 2.1 Local Installation

The local installation is a typical installation for the AD administrator on his own PC or laptop. When you run the application, it starts with the AD permissions of the AD administrator, according to his/her user account (Windows Authentication). If you are not an Active Directory administrator, you can still use the local installation. However, in this case it is not possible to make any changes in the user's properties.

#### Local Installation – System Requirements

- **Windows XP (SP 3) or higher**
- **.Net Framework 4.0**
- **Web Browser**
  - Minimum: Internet Explorer 8
  - Recommended: Internet Explorer, Mozilla Firefox, Google Chrome (latest versions)
- Computer must be member of an Active Directory Domain
- User must be logged in with a Domain-Account

## 2.2 Web Server Installation (IIS)

If you want to use IDM-Portal FreeEdition for your entire company to provide a user portal, the Web Server Installation will be the best choice. You can use the software as an administration portal, to delegate user and permission management or to provide a self service web service for your users.

Install FirstWare IDM-Portal FreeEdition on an Internet Information Server (IIS). The software will be provided in to the users in the network via IIS. Users can access the software with their web browser. There is no additional software installation necessary.

*To change users on the client use the „Sign in“ button (top right).*

### Web Server Installation

#### Host

- **Windows Server 2008 or higher**
- **.Net Framework 4.5 or higher**
- **ASP.Net 4.5 Extensions**
- Internet Information Server (IIS)
- Admin permissions for the installation
- AD Service Account with necessary permissions
- Windows Authentication (optional)

#### Browser

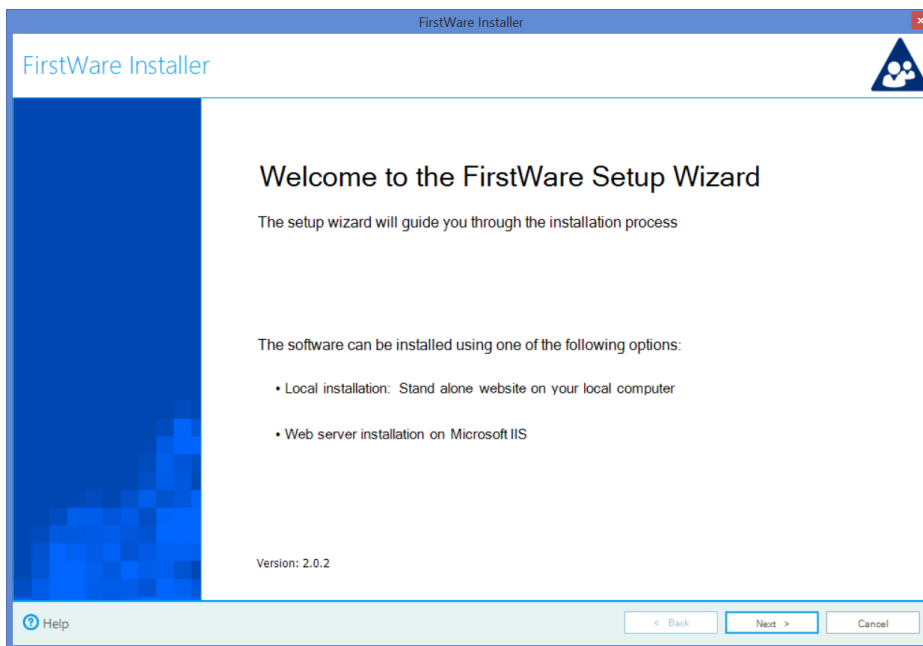
- **Device with internet / intranet access (PC, tablet...)**
- Web Browser
  - Minimum: Internet Explorer 8
  - Recommended: Internet Explorer, Mozilla Firefox, Google Chrome (current versions)

### 3 Installation

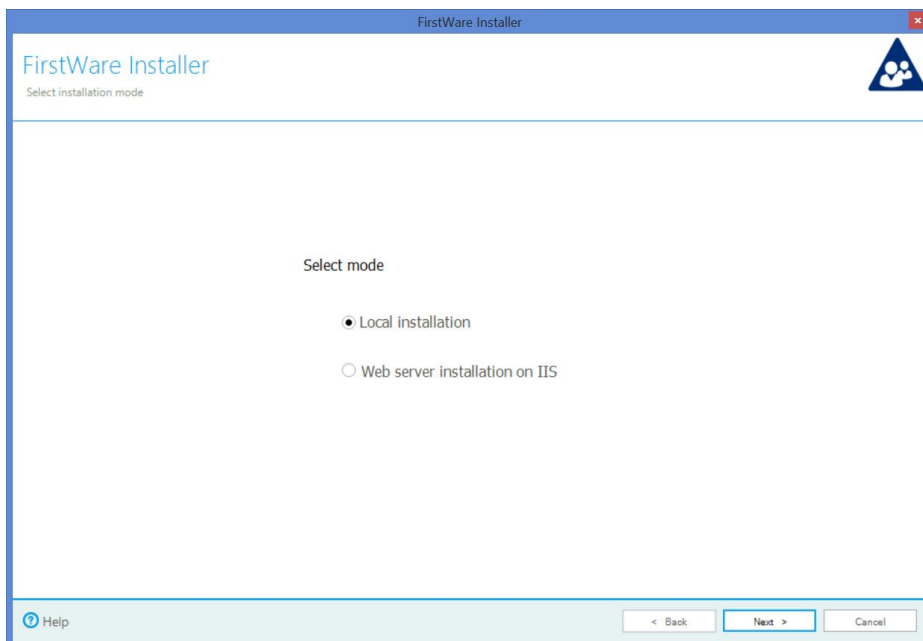
Start the installation routine by executing the file **FreeEdition-Installer.exe**.

*Note: Web Server Installation:*

*Administrator permissions are necessary. Right-click the setup file and choose “run as administrator”.*

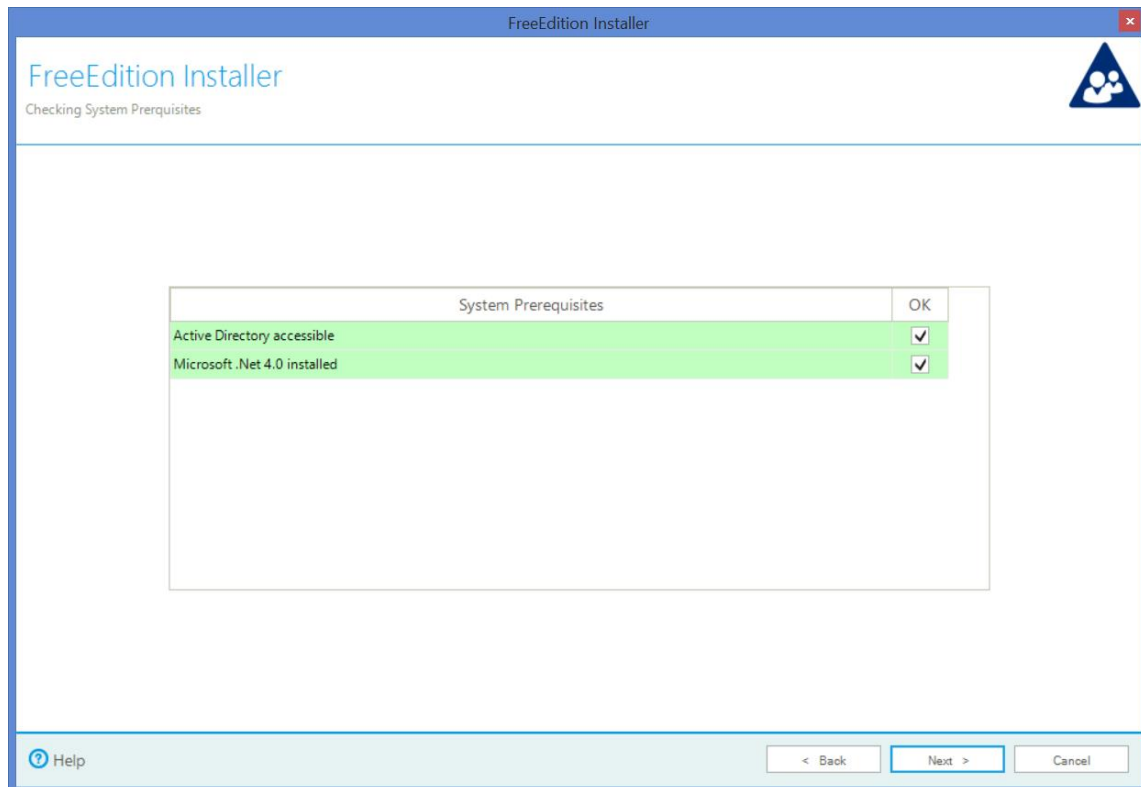


Click „Next“, read the License Agreement and accept it.



Choose the between the installation types **Local Installation** an **Web Server Installation (IIS)**.

### 3.1 Local Installation



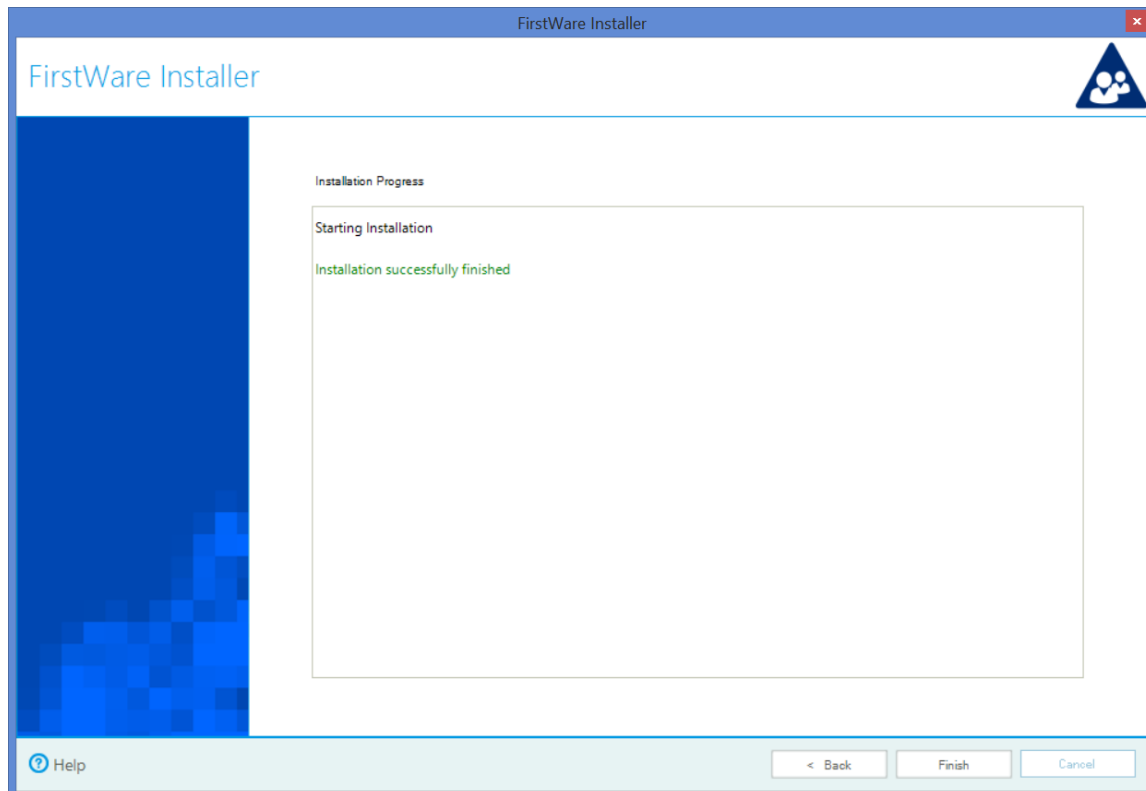
The Installer checks if your configuration meets the requirements.

#### Active Directory accessible:

Is your Active Directory accessible? If not,  
...please check that your PC is member of the domain.  
...please check that you are logged in with a domain account

#### Microsoft .Net 4.0 installed:

Is the .NET Framework 4.0 installed? If not,  
...please install .Net 4.0 or higher



Please wait a moment while IDM-Portal is being installed.

Start the application by double clicking the IDM-Portal FreeEdition icon on your desktop.



FirstWare-FreeEdition

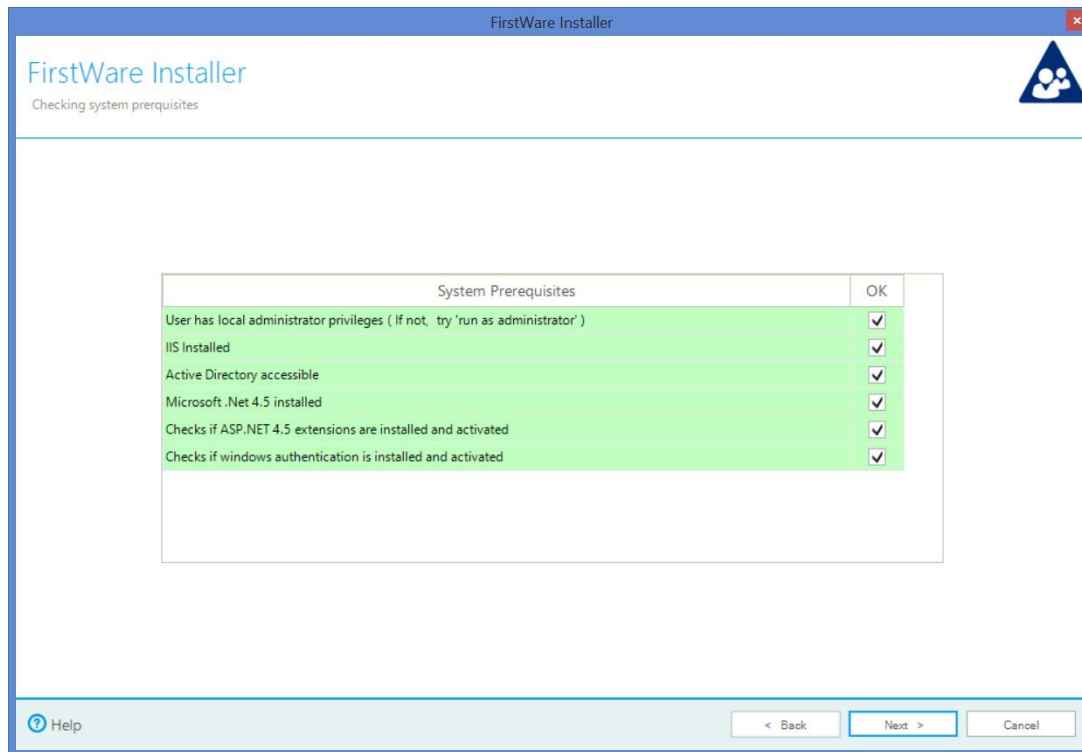
### **What next?**

If you start the software for the first time, it will ask you for a valid license. → [License Check](#)

After the license check you can immediately use IDM-Portal FreeEdition → [FirstWare IDM-Portal – First Steps](#)



## 3.2 Web Server Installation (IIS)



### User has local administrator privileges:

Did you have local admin permissions when starting the installer? If not,  
...please close the installation routine and restart it „run as administrator“.

### IIS Installed:

Is MS Internet Information Server installed on your system? If not,  
...please install IIS and start the installation wizard again.

### Active Directory accessible:

Is your Active Directory accessible? If not,  
...please check that your PC is member of the domain.  
...please check that you are logged in with a domain account

### Microsoft .Net 4.5 installed:

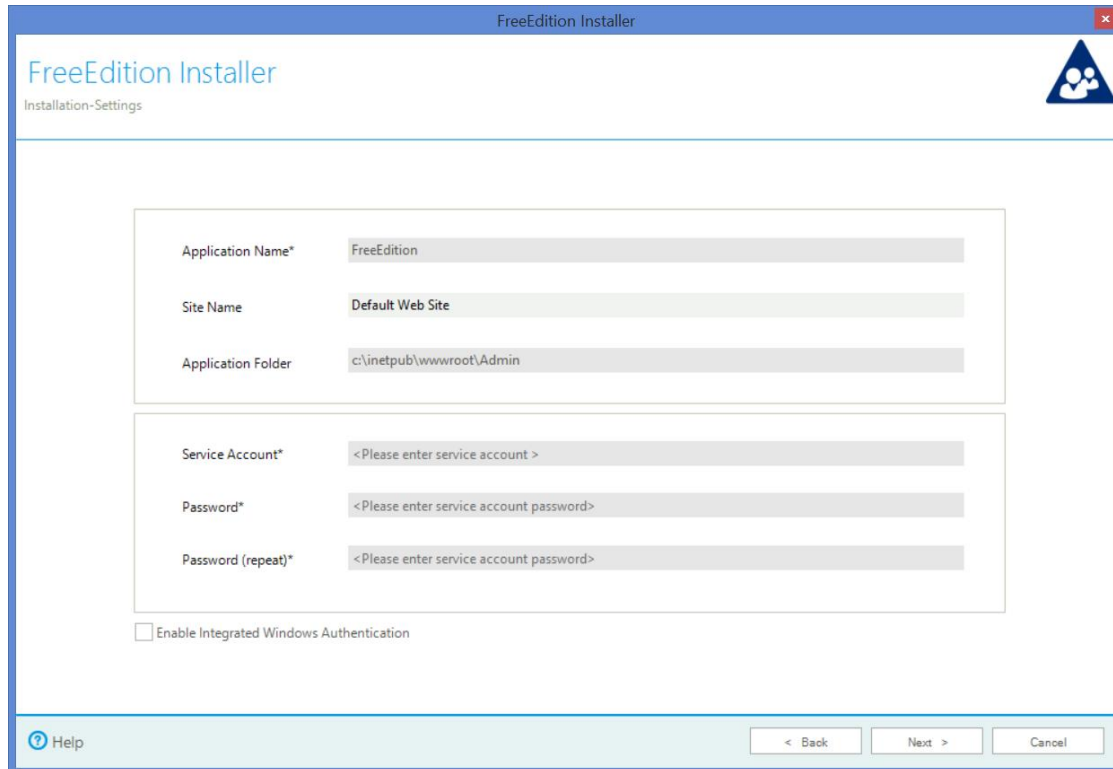
Is the .NET Framework 4.5 installed? If not,  
...please install .Net 4.5 or higher

### Checks if ASP.NET 4.5 extensions are installed and activated:

Did you already install the extenden roles feature? If not,  
...please follow the instructions on the FAQ page.

### Checks if windows authentication is installed and activated - optional:

The Windows authentication allows users a single sign on to Active Directory. If this is activated they do not need to login to the IDM-Portal but can directly use it.



**Application Name\*:**

Choose a description that will be visible at the end of the URL.  
If you choose „FirstWare“ the address might look like <https://yourdomain/firstware>.

**Site Name:**

We recommend you to use „Default Web Site“ here. You can choose what site on your IIS you want to use. Please note that you have create this site in advance if you do not choose “Default Web Site”.

**Application Folder:**

Folder, where the application data will be saved to.

**Service Account\*:**

The Service Account is the AD account that IDM-Portsal uses to access your Active Directory. For this purpose you need write permissions for all attributes and functions you want to edit with the software.

If you want to use all functions within the software, you must be owner of the Admin Role. The Admin Role is limited by the permissions of the Service Account. The User Role limitations are defined by the Admin Role. Read more at [FirstWare IDM-Portal – First Steps](#).

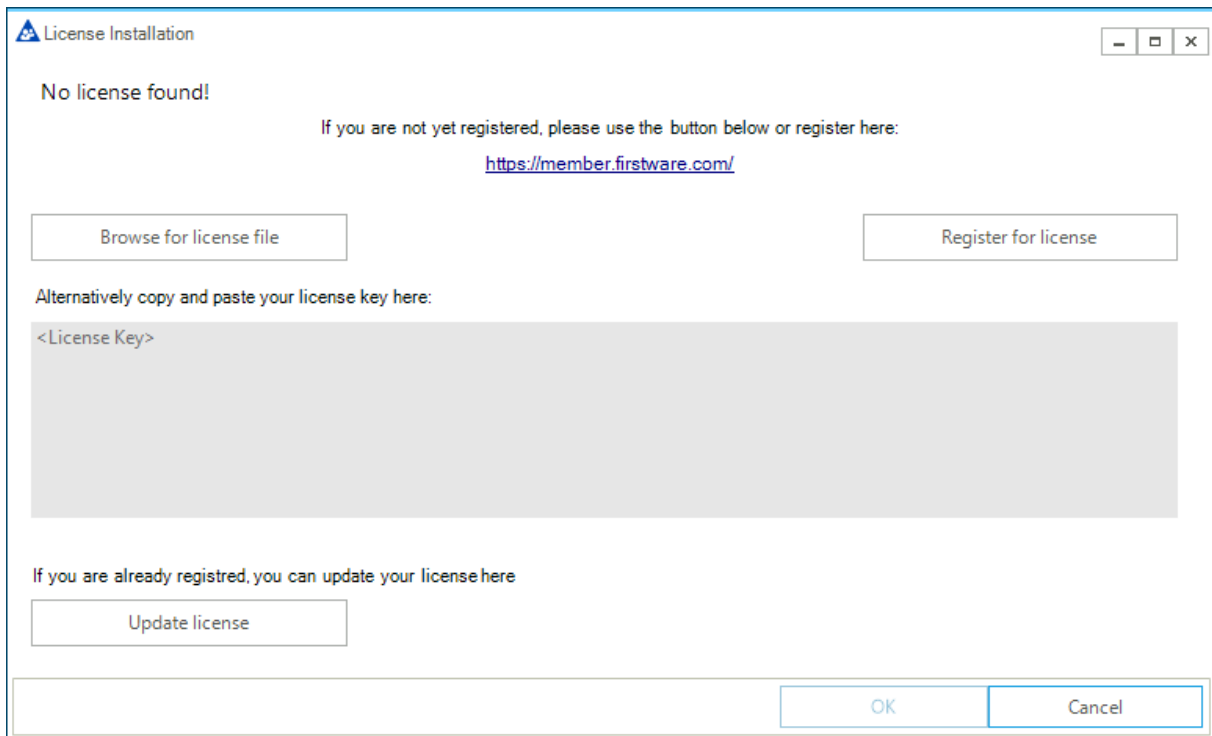
**Password\*:**

Password for the Service Account.

**Enable Integrated Windows Authentication:**

The checkbox will appear in case Windows authentication was detected. If you check this box users do not need to login to IDM-Portal later. They can open their browser and use it directly.

### 3.3 License Check



The image shows a 'License Installation' dialog box. At the top, it says 'No license found!'. Below this, it instructs the user: 'If you are not yet registered, please use the button below or register here:' followed by the URL <https://member.firstware.com/>. There are two buttons: 'Browse for license file' and 'Register for license'. Below these, it says 'Alternatively copy and paste your license key here:' followed by a large text input field with the placeholder '<License Key>'. At the bottom, it says 'If you are already registered, you can update your license here' followed by an 'Update license' button. At the very bottom right are 'OK' and 'Cancel' buttons.

You need a valid license key to use FirstWare IDM-Portal FreeEdition. This dialog will not be displayed in case you already have a license.

If you are using IDM-Portal for the first time, **please register at** <https://member.firstware.com>. You will receive a free license key for the full version. Alternatively you can click “Register for license”

#### Browse for license file:

Upload a license file you already have on your computer.  
Use this option to activate the software offline. Download the license key with a computer with internet access and copy it to the target device.

#### Copy and paste your license key here:

Copy your text license key into the field and click OK.  
You need an email with the license as an encrypted text.

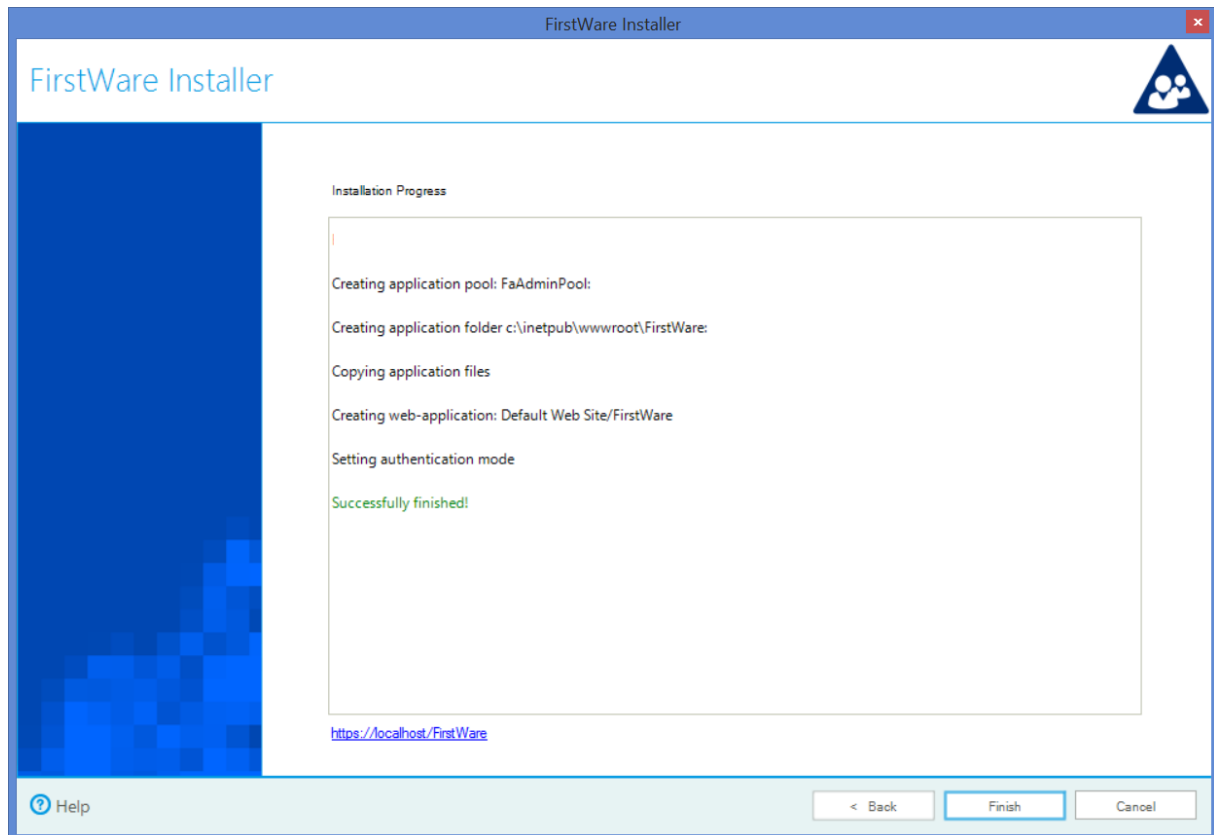
#### Register for license:

If you do not yet have a license, you can register a new account without going to the [member.firstware.com](https://member.firstware.com) website.

#### Update license:

Renew your license in case you already have a FirstWare account.

After you entered your license the installation process will start.



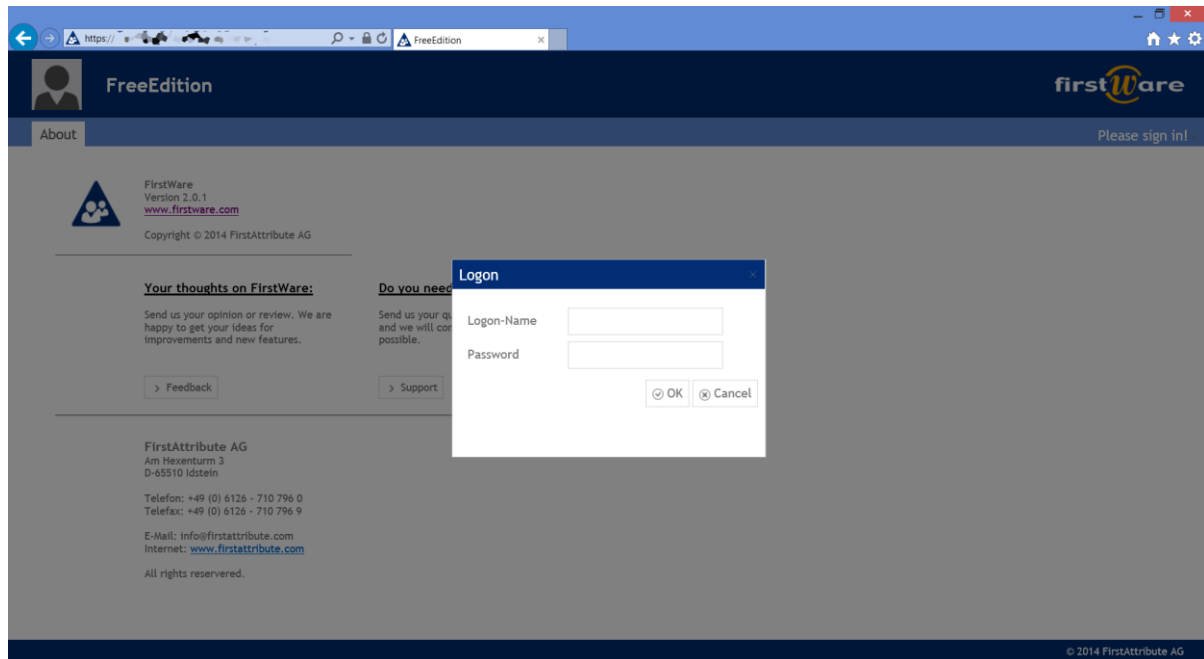
At the end of the installation you get a link to website.

By default it is: <https://localhost/FirstWare>

Click on the link to run the IDM-Portal in your browser.

Finally click „Finish“ to end the installation.

## 4 FirstWare IDM-Portal – First Steps



Log in to the IDM-Portal with an AD administrator account (service account, for example) to run the software using the **Admin Role**. Go to the "Config" tab to specify the group of FirstWare Admins.

If you are not a member of the Admin group, the software starts in the **User Role**. You can also log in with an AD account that does not have admin permissions to see the functionality of the User Role.

Admin Role	User Role
<p>License: FreeEdition © 2014 FirstAttribute AG</p> <p>3 Tabs</p> <ul style="list-style-type: none"><li>• Users</li><li>• Config</li><li>• About</li></ul>	<p>License: FreeEdition © 2014 FirstAttribute AG</p> <p>2 Tabs</p> <ul style="list-style-type: none"><li>• Users</li><li>• About</li></ul>

The **User Role** is defined by Admin Role owners in „Config“ tab.

➔ Go online and read more about [Role Based Access Control with FirstWare \(RBAC\)](#)

After both roles are defined, you can use FirstWare IDM-Portal FreeEdition.

The following is a brief overview of the capabilities of FirstWare IDM-Portal FreeEdition. Click the links for more information and step by step instructions (screenshots).

#### **4.1 Active Directory User Management**

- Manage user accounts
- Create new user accounts
- Maintain user accounts
- Maintain group memberships of a user

[Link to the website with screenshots and further explanations](#)

#### **4.2 Active Directory Phone Book**

- Intranet Telefonbuch
- Phone Book maintenance by assistants
- Users maintain their own data

[Link to the website with screenshots and further explanations](#)

#### **4.3 Active Directory Delegation**

- Delegation and Roles
- Create new user accounts
- Manage mail distribution lists
- Permission management

[Link to the website with screenshots and further explanations](#)

#### **4.4 Active Directory Self Service**

- Self Service – User editable Attributes
- Own user photo in Active Directory
- Maintain personal data

[Link to the website with screenshots and further explanations](#)

#### **4.5 Role Based Access Management**

- Role based access
- Admin Role
- User Role

[Link to the website with screenshots and further explanations](#)

## 5 Release Notes

Release v2016.0

- AD user photo in the search results
- Disable users
- Adjustment of the Config page (show user photos)
- 25 bugs fixed
- Group management has been removed

Known issues:

- **Alternating user**  
occurs only with the following configuration:  
*IIS Installation + integrated Windows authentication is enabled + Internet Explorer*  
If you switch the user via "Sign in as a different user" it is possible that the Internet Explorer performs activities with the previous user account. If the error occurred, please use a different browser or disable the automatic authentication by rerunning the installer. It is also possible to manually remove the Integrated Windows authentication on the IIS application. Alternatively, you can use FirstWare with its Local Installation.
- **Photo upload in IE8**  
occurs only with the following configuration:  
*IIS Installation + integrated Windows authentication is disabled + Internet Explorer 8*  
Photo upload in IE8 without integrated Windows authentication is not supported. We recommend using current browser versions. Please use the Local Installation or Integrated Windows Authentication when running an IIS installation if you want to use IE8.

## 6 Support

FirstAttribute AG offers **free support via web form and mail** for FirstWare IDM-Portal FreeEdition. Unfortunately, we can not offer phone support for the free version of IDM-Portal.

Please use the form for support requests:

<http://www.firstware.com/feedback/>

or send us an email:

[info@firsttribute.com](mailto:info@firsttribute.com)

## 7 Feedback

We want to continuously improve FirstWare IDM-Portal. If you have comments, suggestions or new ideas, we are looking forward to get your message.

If you want to know more about Identity Management with Active Directory, please contact us:

### FirstAttribute AG

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D-65510 Idstein  
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