

## **Oracle® Identity Manager**

Administrative and User Console Customization Guide

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# Preface

This document describes the basic procedures for customizing the appearance and behavior of the Oracle Identity Manager Console. The Console is the client portion that is accessible through a web browser. The *Oracle Identity Manager Administrative and User Console Customization Guide* is intended for those responsible for ensuring that your Console adheres to the corporate design of your web applications environment. This document may also be used by personnel responsible for customizing the labels, descriptive text, and workflow of your Oracle Identity Manager Administrative and User Console.

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**Note:** This is a transitional release following Oracle's acquisition of Thor Technologies. Some parts of the product and documentation still refer to the original Thor company name and Xellerate product name and will be rebranded in future releases.

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## Audience

This document is written for web developers who are familiar working with style sheets, Struts configuration files, Java Server Page (JSP) pages, and XML files.

It is assumed that you are familiar with the Oracle Identity Manager system and documentation (specifically the *Oracle Identity Manager Administrative and User Console Guide*).

## Documentation Accessibility

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This guide assumes that you have read and understood the following documents:

For more information, see the following documents in the Oracle Identity Manager documentation set:

- *Oracle Identity Manager Installation and Upgrade Guide for JBoss*
- *Oracle Identity Manager Installation and Upgrade Guide for WebLogic*
- *Oracle Identity Manager Installation and Upgrade Guide for WebSphere*
- *Oracle Identity Manager Administrative and User Console Guide*
- *Oracle Identity Manager Design Console Guide*
- *Oracle Identity Manager Tools Reference Guide*
- *Oracle Identity Manager Audit Report Developer Guide*
- *Oracle Identity Manager Best Practices Guide*

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<http://www.oracle.com/technology/documentation/index.html>

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.











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# Overview

The *Oracle Identity Manager Customization Guide* explains how to customize the following aspects of your Oracle Identity Manager Administrative and User Console:

- General Page Layout
- Descriptive Text, Labels, and Error Messages
- Colors, Fonts, and Alignment
- Logos
- Self registration and user initiated profile editing (and related approvals)
- Field configuration on pages
- Menu selections that are available for users

The files to be edited and the procedures to be used when editing those files are described within each section dedicated to the particular aspect of your Administrative and User Console. For example, for procedures related to customizing the General Page Layout, refer to the Customizing General Page Layout section.

## Accessing Administrative and User Console Customization Files

Oracle Identity Manager is deployed to your application server as an Enterprise ARchive (EAR) file called `xellerate.ear`. This file is created and deployed to the application server during installation. The name of this file may vary depending on the application server used for deployment. For example, if you use JBoss, this file is called `xellerateFull.ear`, while in WebSphere it is a folder called `xellerate.ear`, and in WebLogic it is a folder named `WLXellerateFull.ear`. This archive file contains some of the files for customizing your Administrative and User Console (such as, `xellerate.css` and `xlWebAdmin.properties`).

To access the files for customizing your client, you have to unpack a Web Archive (WAR) file, make your desired edits, repack the WAR file, and run a script that regenerates the EAR file, and deploys it to your application server.

To customize the Administrative and User Console, ensure that your application server is running and then perform the following tasks:

1. Uncompress the entire `xlWebApp.war` file from the `<XL_HOME>/xellerate/webapp` directory into any directory.
2. Modify the files required (files to be customized)

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**Note:** It is recommended that you create backups of any files before modifying them.

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3. Create a new archive file called `xlWebApp.war` using the `jar` utility.
4. Copy (and overwrite) the `xlWebApp.war` file in `<XL_HOME>/xellerate/webapp`.
5. Run the `patch_<appserver>` script from the `<XL_HOME>/xellerate/setup` directory, where `<appserver>` is the name of your application server, for example, if you are using WebLogic, this file is called `patch_weblogic`.
6. Restart your application server (JBoss, WebSphere, or WebLogic).

---

## Customizing General Page Layout

This section describes how to customize the overall layout of the pages within your Oracle Identity Manager Administrative and User Console. This includes but is not limited to:

- Modifying the width of banners
- Modifying the alignment and orientation of images
- Adding links to the affected regions (for example, a link to your corporate home page from the company logo)

The various regions of the Oracle Identity Manager Administrative and User Console page are divided into regions. [Figure 2–1](#) shows the Oracle Identity Manager Administrative and User Console login page. The page layout is controlled using a JSP page.

**Figure 2–1** Oracle Identity Manager Administrative and User Console Layout

The screenshot displays the Oracle Identity Manager login interface. At the top, the 'ORACLE Identity Manager' logo is shown. Below the logo is a dark blue header bar. The main content area is divided into two sections. On the left is a vertical sidebar with a light green background, containing links for 'Self-Register', 'Create Request', 'Track Request', 'HELP', 'Registration Help', 'Login Help', 'Forgot Password?', and 'Password?'. The right section has a white background and contains the following text: 'Welcome to the Oracle Identity Manager Administrative and User Console.', 'To login, enter your User ID and password.', and '\*Indicates Required Field.' Below this text are two input fields: 'User ID:' with the value 'xelsysadm' and a red asterisk, and 'Password:' with a red asterisk. At the bottom of the input fields are two buttons: 'Login' and 'Clear'. The footer of the page is a dark blue bar with the text 'Oracle Identity Manager 9.0.1 Copyright © 2006, Oracle Corporation.'

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**Note:** This section assumes the reader is a developer familiar with JSPs and Struts. In addition, since the editing of the files mentioned in this section controls how the tiles are rendered, and potentially introduce cosmetic anomalies, it is strongly recommended that you test the effects of your changes before releasing them into a production environment.

---

## Files to Modify

xlWebApp\tiles\common\tjspHeader.jsp  
xlWebApp\tiles\common\tjspFooter.jsp

## Example of How to Customize Your General Page Layout

To control the layout of your Administrative and User Console GUI elements, edit the appropriate JSP file. For example, if you want your company logo to appear on the right-hand side of the header banner and the Oracle Identity Manager product logo to appear on the left-hand side of the header banner:

1. Locate the relevant portion of the `tjspHeader.jsp` file that controls the display of the logo image files to be aligned. This includes sections of the file that have references to the following:
  - `global.image.clientlogo`  
This reference by default points to the Oracle Identity Manager logo, or the product logo.
  - `global.image.xelleratelogo`  
This reference points to a placeholder image where you can add another logo if required. This logo can be replaced by any other logo if such a customization is desired.
2. Then swap the references to these two property variables within the file. For example, you would change the settings from this:

```
<TR>
<TD valign="center" align="center" width="150px" height="60px"
    class="LogoCell">
    <html:img pageKey="global.image.clientlogo"/>
</TD>

<TD valign="center" align="right" height="60px" colspan='2' >
    <html:img pageKey="global.image.xelleratelogo"/>
</TD>

<TD width='20px'>
    <html:img width='20px' pageKey="global.image.spacer"/>
</TD>
</TR>
To this:
<TR>
    <TD valign="center" align="center" width="150px" height="60px"
        class="LogoCell">
        <html:img pageKey="global.image.xelleratelogo"/>
    </TD>

    <TD valign="center" align="right" height="60px" colspan='2' >
```

```
<html:img pageKey="global.image.clientlogo"/>
</TD>

<TD width='20px'>
  <html:img width='20px' pageKey="global.image.spacer"/>
</TD>
</TR>
```

3. Save the changes to the `tjspHeader.jsp` file.
4. To test the display of your Administrative and User Console to ensure that the intended changes have taken effect, reload the Administrative and User Console page.





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## Customizing Text

This section describes how to customize the descriptive text, and labels that appear on the pages of your Oracle Identity Manager Administrative and User Console. This capability offers you the ability to create company-specific:

- Descriptions of procedures (for example, instructional text)
- Labels for pages
- Labels for fields within pages
- Labels that appear on buttons
- Labels for links to other pages
- Copyright dates and information

In addition, this section describes how to edit the error messages that appear under the specific conditions that generate them. This enables you to control the directive instructions provided to users when these conditions occur.

### Files to Modify

`xlWebApp\WEB-INF\classes\xlWebAdmin.properties`

### Customizing Descriptive Text and Labels

The text the client displays is contained in the `xlWebAdmin.properties` file (see the [Accessing Administrative and User Console Customization Files](#) section for details on how to access this file). For any label, procedural instruction, error message that you want to edit, it is recommended that you first access the JSP page in which that text appears, reference the property associated with that text, and then lookup that property name in the `xlWebAdmin.properties` file.

The properties that control the text that appears on more than one page (or is associated with multiple functionalities of the product) are listed in one of the `GLOBAL` sections (for example, `GLOBAL` messages) of the file. The various properties are also divided by type specific-labels (for example, messages, buttons, labels) to better organize the groups of the properties.

The properties that control the text that appears in more limited contexts of the product functionality (for example, create user, self-registration) are listed in sections that are labeled in a function-specific manner (for example, `MANAGE USER` labels).



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## Customizing Colors, Fonts and Alignment

This section describes how to customize the look and feel of the Administrative and User Console by editing the `.css` file (style sheet) that controls the colors and fonts displayed.

### Files to Modify

`xlWebApp\css\Xellerate.css`

### How to Customize Appearance of Your Administrative and User Console

The `Xellerate.css` style sheet defines the color, font, point size, and alignment of the Oracle Identity Manager Administrative and User Console pages (see the [Accessing Administrative and User Console Customization Files](#) section for details on how to access this file). Once you have determined the aspect of your Administrative and User Console appearance that you wish to edit, it is recommended that you view the source for the page, and determine the style sheet class associated with the element on the page that you want to change, and then lookup that class name within the `Xellerate.css` file.

The `Xellerate.css` file contains context labels to assist you in locating the class to edit to customize a particular aspect of the Administrative and User Console appearance. In addition, the classes within this file are organized according to the region of the screen (for example, header, body, footer) and HTML elements (for example, links, tables, checkboxes) they affect.



---

## Customizing Logos

This section describes how to add your own logos to your Oracle Identity Manager Administrative and User Console . By copying a logo file into the EAR file, and editing the relevant values in the `xlWebAdmin.properties` file, you can set Oracle Identity Manager to display your own corporate logo, or the logo of your customers or partners. This enables you to brand the appearance of the solution you are providing to your customers, or apply the branding that your partners may require if they want their own logos displayed. The logo that appears on the Oracle Identity Manager Administrative and User Console login page using the default settings is shown in [Figure 5–1](#).

**Figure 5–1** Default Logo on Administrative and User Console Login Page



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**Note:** To control how these logos are aligned within the banner region, refer to [Chapter 2, "Customizing General Page Layout"](#)

---

### Files to Modify

`xlWebApp\WEB-INF\classes\xlWebAdmin.properties`  
`xlWebApp\images` directory

### Replacing the Product Logo

To replace the Oracle Identity Manager logo that appears in the left-hand region of the uppermost banner with your desired logo:

1. Place the image file (in GIF format) that contains your logo in the `\xlWebApp\images` directory.
2. Open the `xlWebAdmin.properties` file.
3. Locate the property called `global.image.clientlogo` (within the GLOBAL images section) and set it to the full path and name of the image file that contains the desired logo (for example, `/images/mycorporate_logo.gif`)

---

**Note:** The default value of this property is `/images/client_logo.gif`.

---

Redeploy `Xellerate.ear` (see the [Accessing Administrative and User Console Customization Files](#) section for details on how to access this directory and the `xlWebAdmin.properties` file and how to redeploy the EAR file).

## Inserting Your Company Logo

There is a placeholder image in the right-hand region of the uppermost banner of the Oracle Identity Manager Administrative and User Console. You can replace this placeholder image with any desired logo:

1. Place the image file that contains your logo in the `\xlWebApp\images` directory
2. Open the `xlWebAdmin.properties` file.
3. Locate the property called `global.image.xelleratelogo` (within the GLOBAL images section) and set it to the full path and name of the image file that contains the desired logo (for example, `/images/myproductbrand_logo.gif`)

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---

**Note:** The default value of this property is  
`/images/xellerate-trans-grey.gif`.

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Re-deploy `Xellerate.ear` (see the [Accessing Administrative and User Console Customization Files](#) section for details on how to access this directory and the `xlWebAdmin.properties` file and how to redeploy the EAR file).

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## Customizing Self-Registration and User Profile Management

This section describes how to customize the self-registration process for creating user accounts, and how users edit their account profiles in the Oracle Identity Manager Administrative and User Console.

For registration, you are able to customize:

- Whether self-registration is allowed
- Which fields are available to be used during the registration process
- Which fields are displayed, and which are mandatory when a user is self-registering
- Whether approvals are required for self-registration

For user-initiated changes to the user profile, you are able to customize:

- Which fields the user may edit in their own profile
- Whether approvals are required for user initiated profile changes
- What fields the approver may edit or override

This chapter includes the following topics:

- [Files to Modify](#)
- [Customizing Self-Registration Options](#)
- [Customizing Self-Initiated Profile Management Options](#)
- [Customizing Service Accounts](#)

### Files to Modify

<XL\_HOME>\xellerate\config\FormMetaData.xml

In addition, you must edit the relevant records within the Oracle Identity Manager Java Client.

### Customizing Self-Registration Options

This section describes how to customize the self-registration functions of your Oracle Identity Manager Administrative and User Console.

## Specifying Whether Self-Registration is Allowed

To specify whether self-registrations is allowed, do the following:

1. Log in to the Oracle Identity Manager Java Client.
2. Access the System Configuration form (Xellerate Administration > System Configuration).
3. Query to find the `Is Self-Registration Allowed?` property.
  - Set the value to `TRUE` to allow users to self-register.
  - Set the value to `FALSE` to disallow users from self-registering.
4. Save the changes.

## Defining Custom Fields for the User Information Pages

There are several fields already defined for user information. These fields are used on the user self-registration and profile pages of the Administrative and User Console. You can create custom fields for users to enter information when they are self-registering or editing their profiles.

---

---

**Note:** The default system fields that are available for use on the Self-Registration pages are listed in the `<!-- User Self Registration and User Profile Modification section -->` section of the `FormMetaData.xml` file

---

---

To create custom fields for the user self-registration page:

1. Log in to the Oracle Identity Manager Java Client.
2. Access the User Defined Field Definition form (Xellerate Administration > User Defined Field Definition).
3. Query to find the Users form.
4. Create a user-defined field (for example, social security number). For instructions on how to define user-defined fields, refer to the *Oracle Identity Manager Design Console Guide*.
5. Save and close the User Defined Fields form.
6. Open the Oracle Identity Manager `FormMetaData.xml` file in a text editor and locate the section called

```
<!-- User Self Registration and User Profile Modification section -->.
```

7. To define the attribute, add an entry for it in the format:

```
<Attribute name="identifier" label="field_label"
displayComponentType="datatype" map="database_column" />
```

where

- `identifier` is the identifier used to specify this field. This is the name used to specify this field when you define a page.
- `field_label` is the word displayed next to the field in the Administrative and User Console (what the user sees).



- `datatype` is the data type of the field displayed in the Administrative and User Console.
- `database_column` is the database column name, specified when you created the field definition using the Java Client. User defined fields are prefixed with `USR_UDF_`, so if you typed in `SSN` in the Java Client, this value is `USR_UDF_SSN`. For example,

```
<Attribute name="USR_UDF_SSN" label="SSN" displayComponentType="TextField"
          map="USR_UDF_SSN" />
```

---

**Note:** This is the same information you entered when you used the Java Client to create a field definition.

---

8. Save the changes to this file.

Once you have created a custom field and defined it, you can use it in a page definition.

## Defining the User Self-Registration Page

You can specify which fields are displayed, and which are required when users are self-registering. To display a custom field, you must reference it in the section of the `FormMetaData.xml` file for the self-registration user page (see the [Defining Custom Fields for the User Information Pages](#) section).

To define the user self-registration page:

1. Open the `FormMetaData.xml` file.
2. Locate the section called `<Form name="SelfRegistrationUserForm">`. This section contains the definition of the User Self Registration page. To add a field to the page, add a reference to the field in a new row in the following format:

```
<AttributeReference optional=true/false>identifier</AttributeReference>
```

where

- `identifier` is the name you specify in the definition section of the file
- `optional` is used to specify whether a field is required or optional. Setting `optional` to `false` makes the field required, and `true` makes it optional.

For example, to add a new required field with the identifier, `USR_UDF_SSN`, add the following line:

```
<AttributeReference optional="false">USR_UDF_SSN</AttributeReference>
```

---

**Note:** The default value is `true`, so if a field is required, you may omit this attribute.

---

3. Save the changes to this file and close it.

---

**Note:** To remove a field from the self registration page of the Oracle Identity Manager Administrative and User Console, remove the row from the `<Form name="SelfRegistrationUserForm">` section that represents the field.

---

## Specifying Whether Approvals are Required for Self-Registration

To disable approvals for self-registration, ensure that the User Registration approval process does not contain any non-conditional tasks.

Ensure that all fields required to register a user are present on your User Self-Registration page. This means that you must make sure that there are no fields set as required on the registration-related approval pages that are not also present on the User Self-Registration page. Refer to the Customizing field configuration section of this document for the section of `FormMetaData.xml` file to edit.

---

**Note:** By default, Oracle Identity Manager does not present the Organization and Role fields to the user when they are self-registering. Values for these fields are required in order to register a user. As a result, the values of these fields must be set on the request (under the User Information branch) by an administrator or approver.

---

To enable approvals for self-registration, ensure that the User Registration approval process contains at least one manual non-conditional task.

## Customizing Self-Initiated Profile Management Options

The procedures in this section allow you to customize how users can edit their own profiles. By default, all users, once registered, are able to edit their own profile information. Oracle Identity Manager provides you with the ability to control which fields within their profile they are able to edit, whether approvals must be obtained in order to allow these changes and, if so, what fields the approver may update.

### Specifying Fields that Users May Edit in Their Profiles

To specify the fields that users can edit in their profiles:

1. Open the `FormMetaData.xml` file.
2. Locate the section called `ProfileModificationUserForm`.
3. Set the `editable` parameter to `TRUE` for each of the fields you wish to allow users to edit in their own profile
4. Save and close the file.

### Specifying Whether Approvals Are Required for User-initiated Profile Changes

If you wish to disable approvals for user-initiated profile changes:

1. Ensure that the User Profile Edit approval process does not contain any non-conditional tasks.
2. Ensure that all fields required for a user to update their profile are present on your Modify Account Profile page. This means that you must make sure that there are no fields set as required on the profile update-related approval pages that are not also present on the Modify Account Profile page. Refer to the Customizing field configuration on pages section of this document for the section of `FormMetaData.xml` file to edit.

If you wish to enable approvals for user-initiated profile changes, ensure that the User Profile Edit approval process contains at least one manual non-conditional task.

## Specifying the Fields That the Approver May Edit or Override

1. Open the `FormMetaData.xml` file.
2. Locate the section called `ProfileModificationApprovalForm`.
3. Set the `editable` parameter to `TRUE` for each of the fields you wish to allow users to edit in their own profile
4. Save and close the file.

## Customizing Service Accounts

Service accounts are general administrator accounts (for example, `admin1` and `admin2`), which are used for maintenance purposes and are typically shared by a set of users. Usually these accounts are used to allow one system (rather than a user) to interact with another system. The model for managing and provisioning service accounts is slightly different from normal provisioning.

---

**Note:** Oracle Identity Manager provides only back-end support for service accounts and they can be managed only through APIs.

---

## Service Account Behavior

Here are some features of service account behavior:

- Service accounts are requested, provisioned, and managed the same as regular accounts. A service account is no different from a regular account, in that it uses the same resource object, provisioning processes, and process/object forms. It is distinguishable from a regular account only by a flag. This flag gets set by the user making the request for the resource, or by the administrator directly provisioning the resource.
- During its lifecycle, a service account can be changed to a regular account, and a regular account can be changed to a service account. When any of these changes occurs then Service Account Changed task functionality is triggered.
- When the user gets deleted, the resource will not be revoked (the provisioning process for the service account should not get cancelled), causing the undo tasks to fire. Instead, a task should get inserted into the provisioning process (the same way Oracle Identity Manager handles disable/enable actions). The Service Account Alert task functionality is triggered.
- When the user gets disabled, the resource should not be disabled (tasks of effect Disable should not be inserted into the provisioning process for the service account instance). Instead, the Service Account Alert task functionality is triggered and a task gets inserted into the provisioning process.
- Explicitly disabling, enabling, or revoking a service account instance (directly or through a request) is managed in the same way as for regular accounts.
- Oracle Identity Manager API can be used to transfer (move) a provisioned service account resource (provisioning process, process form entry, and so on) from one user to another. When this happens, the Service Account Move task functionality is triggered.

## Converting Accounts

A user (administrator) can change a regular account to be a service account or change a service account to be a regular account. If any of these changes occur, then the Service Account Change task will be inserted within the provisioning process (becoming active in the Tasks tab of the Process Definition). Any adapter associated with this provisioning process will be executed. If there is no adapter, then a predefined response code will be attached.

The relevant APIs for this functionality are:

- `tcUserOperations.changeFromServiceAccount`
- `tcUserOperations.changeToServiceAccount`

## Service Account Alerts

When any lifecycle event occurs for the user to whom the service account is linked, the Service Account Alert task is inserted into the provisioning process of that service account instance. A user (administrator) can use this task to initiate the appropriate actions in response to any disabling event that occurred for the user.

Qualifying lifecycle events for a user are the user being disabled or the user being deleted. In these cases, the only action that happens to the service account instance is the service account alert task being inserted.

This behavior is not followed for events directly on the service account (like explicitly disabling a service account).

## Moving Service Accounts

A user (administrator) can transfer ownership of a service account from one user to another. This translates into the provisioning instance showing up in the resource profile of the new owner, and no longer in the resource profile of the old user. The Service Account Moved task is inserted into the provisioning process of the resource instance after the account is moved. Any adapter associated with this provisioning process will be executed. If there is no adapter, then a pre-defined response code will be attached.

The API method for moving a Service Account is `tcUserOperationsIntf.moveServiceAccount`.

## Service Account Flag APIs

The following API methods set the flags associated with service accounts:

- `tcRequestOperations.addRequestObject`
- `tcRequestOperations.setRequestObjectAsServiceAccountFlag`
- `tcUserOperations.changeFromServiceAccount`
- `tcUserOperations.changeToServiceAccount`
- `tcUserOperations.provisionObject`
- `tcUserOperations.moveServiceAccount`
- `tcObjectOperations.getServiceAccountList`

The names of the flags are indicative of the function of each flag.





---

## Customizing Field Behavior and Functionality

This chapter describes how to customize the behavior of the various fields that appear within your Oracle Identity Manager Administrative and User Console. This includes the ability to:

- Edit the system fields that appear on the Administrative and User Console pages.
- Add new user-defined fields.
- Control who has the ability to edit the values in various fields.

### Modifying the FormMetaData.xml File

The `FormMetaData.xml` file is used to control the behavior and look and feel of the Administrative and User Console look.

It consists of sections where you can define attributes, and use them in other sections to determine the look and behavior of Web pages. To define a new value property for this file, you must define the attribute, and then you must reference it for a page. You can also edit how the default fields behave (for example, make them editable or required).

The field behavior that you can customize is:

- Whether the field is viewable
- Whether the field is editable
- Whether the field is required

---

**Note:** In addition, for the fields contained on the Administrative and User Console pages, the labels applied to these fields are set using the `FormMetaData.xml` file. For all other fields, any labels applied to the fields in the Administrative and User Console are set using `xlWebAdmin.properties` file.

---

For all entries in the `FormMetaData.xml` file, the attributes section defines the fields that are included in the pages. The attribute references sections define the fields that appear on a particular page or group of pages.

This section contains the following topics:

- [Defining a New Field](#)
- [Files to Modify](#)

■ [Setting Field Configuration](#)

**Defining a New Field**

To define a new field for the Administrative and User console:

- 1. Create the field definition using the Java Client. Note this information for use in editing the `FormMetadata.xml` file.
- 2. Define the attribute in the `FormMetadata.xml` file.

To define the attribute, add an entry for it (this is the same information you entered when you used the Java Client to create a field definition) where you specify the following information:

```
<Attribute name="identifier" label="field_label"
displayComponentType="datatype"
map="identifier" />
```

where

- `Attribute name` is the identifier used to specify this field. This is the name used to specify this field on a page.
- `label` is the word displayed next to the field in the Administrative and User Console (what the user sees).
- `displayComponentType` is the data type of the field displayed in the Administrative and User Console.
- `map` is the database column name, specified when you created the field definition using the Java Client. User defined fields are prefixed with `USR_UDF_`, so if you typed in `SSN` in the Java Client, this value is `USR_UDF_SSN`.

For example:

```
<Attribute name="social" label="SSN" displayComponentType="TextField"
map="USR_UDF_SSN" />
```

- 3. Reference the attribute in the `FormMetadata.xml` file in the section for the page on which you want the field to appear. The following table lists the forms.

FormMetadata.xml File Sections	
<!-- User Self Registration and User Profile Modification section -->	
User self-registration form	<Form name="SelfRegistrationUserForm">
Self-registration Approval form	<Form name="SelfRegistrationApprovalFor m">
User profile modification form	<Form name="ProfileModificationUserForm >
User profile modification Approval form	<Form name="ProfileModificationApproval Form">
<!-- User Management section -->	
User form	<Form name="3">



---

**FormMetaData.xml File Sections**


---

Group form	<Form name=" 6 ">
<!-- Organization Management section -->	
Organization form	<Form name=" 2 ">
<!-- Resource Management section -->	
Resource form	<Form name=" 5 ">

---

The pages on which you can customize field behavior are listed here:

Page	How it is accessed
User Detail	Using the Manage link under Users, then execute a query and select a particular user account.
Create User	Using the Create link under Users.
User Self Registration	Using the Create Request link under Self-Registration.
Modify Account Profile	Using the Account Options link. Then click Modify Account Profile.
Edit User	Using the Manage link under Users, then execute a query and select a particular user account. Then, click the Edit button at the bottom of the User Detail page.
Create User Request	Using the Track link under Requests, then execute a query and select a particular request (of type Self-Registration). Expand the User Information branch and click Provide User Information.
Organization Detail	Using the Manage link under Organizations, then execute a query and select a particular organization.
Create Organization	Using the Create link under Organizations.
Group Detail	Using the Manage link under User Groups, then execute a query and select a particular user group.
Create User Group	Using the Create link under User Groups.
Resource Detail	Using the Manage link under Resource Management, then execute a query and select a particular resource.

---

For each of these pages, Oracle Identity Manager comes preconfigured with certain system fields. In addition, you can define user defined fields to be displayed on these forms as well. The behavior of either of these types of fields can be customized for the pages listed here. However, the procedure for customizing their behavior differs depending on whether the field is a system-defined field or user-defined field.

---

**Note:** All User-defined fields must first be defined using the User Defined Field Definition form of the Oracle Identity Manager Java Client. For instructions on how to define a user-defined field, refer to the *Oracle Identity Manager Design Console Guide*.

Once you have created the user-defined field within the Oracle Identity Manager Java Client you then also add it to the list of attributes in `<!-- User Self Registration and User Profile Modification section -->` section (but not the `<!--User Management -->`) of the `FormMetadata.xml` file.

Ensure that your attribute entry provides values for each of the following parameters:

- `Name` (must be same as column name for this field in the Java Client)
- `Label` (does not need to conform to label specified for this field in the Java Client)
- `DisplayComponentType` (must be same as the value of `FieldType` for this field in the Java Client)
- `DataLength` (must be same as the value of `Length` for this field in the Java Client)
- `Map` (must be same as column name for this field in the Java Client)

Make the entry for the user-defined field consistent with the definition of the field in the Oracle Identity Manager Java Client.

---

## Files to Modify

`FormMetadata.xml`

## Setting Field Configuration

The following sections describe how you can configure fields in various pages.

### For Fields in the User Detail, Create User, and Edit User Pages

The list of fields that are available for use within your:

- Create User
- User Detail
- Edit User

Pages are controlled by the attribute definition within the `<!-- User Management section -->` of the `FormMetadata.xml` file. The fields that are displayed on each of these pages are controlled using the attribute references in the `<!--Fields that will be displayed on the Users form section-->` of the `FormMetadata.xml` file

For each attribute reference, you may specify whether the field is:

- Viewable (by adding the attribute reference to the relevant section)
- Editable (by specifying a value of `TRUE` or `FALSE` for the `editable` parameter)
- Optional (by specifying a value of `TRUE` or `FALSE` for the `optional` parameter)

---

**Note:** You do not need to add an attribute definition or attribute references for user-defined fields associated with these pages.

---

### For Fields in the User Self Registration, Create User Request, and Modify Account Profile Pages

The fields in the User Self Registration, Create User Request, and Modify Account Profile pages are controlled by the attribute definition within the `<!-- User Self Registration and User Profile Modification section -->` of the `FormMetaData.xml` file. The fields that appear on each of these pages are controlled using the attribute references in the following sections of the `FormMetaData.xml` file

Section	Page Affected
<code>&lt;Form name="SelfRegistrationUserForm"&gt;</code>	User Self Registration
<code>&lt;Form name="SelfRegistrationApprovalForm"&gt;</code>	Create User Request
<code>&lt;Form name="ProfileModificationUserForm"&gt;</code>	Modify Account Profile

For each attribute reference, you may specify whether the field is:

- Viewable (by adding the attribute reference to the relevant section)
- Editable (by specifying a value of `TRUE` or `FALSE` for the `editable` parameter)
- Optional (by specifying a value of `TRUE` or `FALSE` for the `optional` parameter)

### Examples

For example, to set the system field User ID field on the Create User Request page to be viewable, editable, and required.

1. Open the `FormMetaData.xml` file
2. Locate the section called `<!-- Definition of the form that will be displayed to the approver(s) for self registration approvals -->`.
3. Add an attribute reference to this section of the file to represent behavior of this field on the Create User Request page:

```
<AttributeReference editable="true" optional="false">
Users.User ID
</AttributeReference>
```

This entry causes the User ID field to be visible, editable, and required on the Create User Request page.

---

**Note:** To edit the label applied to a field, edit the value of the `label` parameter of the applicable attribute definition.

---



## Customizing Menus

This section describes how to customize the menus in the Oracle Identity Manager Administrative and User Console. To customize the menus in the Oracle Identity Manager Administrative and User Console:

1. Identify the menu group or item that you want to customize. Then obtain the class name of the menu group or item by using the Form Information form in the Oracle Identity Manager Design Console.

For example, the class name for the Request New Resources item on the My Resources menu is `My Resources.Request New Resources`. This name is stored in the database `WIN` table. The corresponding menu item shows that the menu group code is `My Resources` and the menu item code is `Request New Resources`.

2. Open the `xlWebAdmin.properties` file. The following table identifies the location of the `xlWebAdmin.properties` file for each supported application server.

Application Server	Location
JBoss	<ol style="list-style-type: none"> <li>1. Extract <code>xlWebApp.war</code> from the EAR file located in <code>JBoss_HOME\server\default\deploy\XellerateFull.ear</code>.</li> <li>2. Extract <code>xlWebApp.war\WEB-INF\classes\xlWebAdmin.properties</code> from the WAR file.</li> <li>3. Edit the <code>xlWebAdmin.properties</code> file.</li> <li>4. Repackage the WAR file.</li> <li>5. Repackage the EAR file.</li> </ol>
WebSphere	The file is available in the location <code>WS_HOME\installedApps\&lt;cell_name&gt;\Xellerate.ear\xlWebApp.war\WEB-INF\classes\xlWebAdmin.properties</code> .
WebLogic	<p><b>Admin Server:</b> The file is available in the location <code>WL_HOME\user_projects\domains\&lt;domain_name&gt;\XLAApplications\XLXellerateFull.ear\xlWebApp.war\WEB-INF\classes\xlWebAdmin.properties</code>.</p> <p><b>Managed Server:</b> The file is available in the location <code>WL_Home\user_projects\domains\&lt;domain_name&gt;\&lt;managed_server&gt;\stage\Xellerate\xlWebApp.war\WEB-INF\classes\xlWebAdmin.properties</code></p>

3. To modify a menu group, locate the property name for the menu group that you want to customize. Each menu group has a single property associated with it, which represents the display label.

---

The property name for the menu group display label has the form `menuGroup.menu group code` with the spaces replaced by hyphens ( - ). So for a menu group with code `My Resources`, the property name is `menuGroup.My-Resources`. Modify the value assigned to the property to the label you want to display.

4. To modify a menu item, locate the properties of the menu item you want to change. Each menu item has two properties associated with it: the menu item display label property and the menu item link property, which identifies the target page that opens when a menu item is selected.

The property name for a menu item display label has the form `menuItem.menu group code.menu item code` with the spaces replaced by hyphens. This means that a menu item with the code `Request-New-Resources` under a menu group with the code `My-Resources` has a property name of `menuItem.My-Resources.Request-New-Resources`. The menu item link property is in the form `menuItem.menu group code.menu item code.link`.

5. To create new menu items or groups, you must create the correct entries in the system using the Form Information form in the Oracle Identity Manager Design Console. Next, you must add the corresponding new properties mentioned in step 4. For each new menu group, one new property is required, and for each new menu item, two new properties are needed.

For example, suppose you want to add a new menu group with the code 'My Links' and two new menu items under it, with codes 'Favorites' and 'Non-Work Links'. You must create two new entries in the system using the 'Form Information' form in the Oracle Identity Manager Design Console with the class names 'My Links.Favorites' and 'My Links.Non-Work Links'. The class names you use can be anything, the instances here are just examples. The labels that are displayed do not depend on these names.

6. Then, you need to add the following properties to the `xlWebAdmin.properties` file using the class names specified in step 5:

```
menuGroup.My-Links=My Links
menuGroup.My-Links.Favorites=Favorites
menuGroup.My-Links.Favorites.link=favorites.do?myfavorites
menuGroup.My-Links.Non-Work-Links=Non-Work Links
menuGroup.My-Links Non-Work-Links.link=nonworklinks.do?nonworklinks
```

Whatever values you give on the right-hand side of the properties will be the values displayed on the screen.

Keep in mind that in order to change the menu group or item names, only the `xlWebAdmin.properties` file should be changed. No change is required to the database or code.







---

## Customizing Group Menu Item Access

---

This section describes how to specify which Oracle Identity Manager Administrative and User Console menu items are available to a particular group. The menu items are shown displayed as links in the left hand panel of the Oracle Identity Manager Administrative and User Console.

Administrators can set the menu items for groups they manage using the group Menu Items page. Menu items listed in the group menu items page are available to that group. Items can be added and removed from the page. If a user is a member of multiple groups, they have access to all of the menus associated with each of the groups to which they belong.

---

**Note:** To ensure that all users of the Administrative and User Console have access to at least the most basic menu items, assign those menu items to the All Users group.

---

For example, if User A was a member of two groups, ABC and XYZ, and members of the ABC group were entitled to access Requests.Create while members of XYZ were enabled to access Requests.Track, User A would be able to access both the Create (under Requests) and Track (under Requests) pages of the Administrative and User Console.

Each menu group has the `menuGroup.menu group code` property associated with it. Each menu item has two associated properties: `menuItem.menu group code.menu item code`, which gives the display label of the menu item; and `menuItem.menu group code.menu item code.link`, that defines the link destination.

In order to create new menu items or groups, create the menu item entries in the system using the Form Information form. Then add the corresponding properties.

The following table presents the complete list of Oracle Identity Manager Administrative and User Console menu items to which a user group can be granted access:

Menu Item Name	Function
Self Account Profile	Allows users to access their account profiles.
Reset self password	Allows users to change their passwords.
Change Challenge Q&A	Allows users to change their challenge questions.
My Proxy	Allows users to view their proxy details.
My Resources	Allows users to view their provisioned resources.

---

Menu Item Name	Function
My Requests	Allows users to view their requests (raised for them or by them).
Request New Resources for self	Allows users to initialize and/or submit requests to provision resources to themselves.
Request Resources	Allows users to make requests.
Track Requests	Allows users to track existing requests.
ToDo List Pending Approvals	Allows users approve tasks within existing requests.
ToDo List Open Tasks	Allows users to view open tasks assigned to them, or to users they manage.
Create Users	Allows users to create user accounts.
Manage Users	Allows users to view, edit, and otherwise manage users they administer.
Create Organizations	Allows users to create organizations.
Manage Organizations	Allows users to manage organizations they administer.
Create User Groups	Allows users to create groups.
Manage User Groups	Allows users to view, edit, and otherwise manage groups they administer.
Create Access Policies	Allows users to create access policies.
Manage Access Policies	Allows users to view, edit, and otherwise manage access policies they administer.
Manage Resources	Allows users to view, edit, and otherwise manage resources they administer.
Deployment Management Export	Allows the user to export Xellerate entities as XML files.
Deployment Management Import	Allows the user to import Xellerate entities from XML files created by using the Deployment Manager Export feature.
Operational Reports	Allows the user to view a list of available Operational Reports and run them.
Historical Reports	Allows the user to view a list of available Historical Reports and run them.
Attestation Configuration Create	Allows the user to create an attestation process.
Attestation Configuration Manage	Allows the user to view, edit and otherwise manage the attestation processes.
To-Do List Attestation	Allows the user to view pending attestation requests assigned to them.
Attestation Configuration Dashboard	Allows the user to view active attestation processes.

#### To Assign a Menu Item to a User Group:

1. Log in to the Administrative and User Console as an administrator.
2. Click **User Groups**.
3. Click **Manage**.
4. Search to find the group.
5. Click the group name

- 
6. From the **additional details** drop-down menu, select **Menu Items**.
  7. Click **Assign Menu Items**.
  8. From the Assign Menu Items page, select the **Assign** option for any menu item that you want to assign to the selected group.

---

**Note:** If there are more items than are displayed in the table, click **Next** to view the rest of the items.

---

9. Click **Assign**.
10. Click **Cancel** to return to the Assign Menu Items page.

or

Click **Confirm Assign**.

The items are added to the group users the next time they log in.

#### **To Remove a Menu Item from a User Group:**

1. Log in to the Administrative and User Console as an administrator.
2. Click **User Groups**.
3. Click **Manage**.
4. Search to find the group.
5. Click the group name.
6. From the **Additional Details** drop-down menu, select **Menu Items**.
7. Select the **Delete** option for each of the desired menu items.
8. Highlight the Administrative and User Console menu item you wish to prevent the user group from accessing.
9. Click **Delete**.
10. Click **Confirm Delete**.

#### **To Rename a Menu Item:**

In order to change the menu group or item names, only the `xlWebAdmin.properties` file needs to be changed. No change is required in the database or code.

1. Identify the group item name that needs to be changed.
2. Get the class name of that menu item from the system using the Form Information form in the client.

For example, for the menu item Request New Resources from My Resources, the class name is `My Resources.Request New Resources`. This name is in the database in the `WIN` table. This menu item shows that the menu group code is `My Resources` and the menu item code is `Request New Resources`.

3. Record the menu group and menu item codes, and open the `xlWebAdmin.properties` file.
4. Search for the property name in the `xlWebAdmin.properties` file.
5. Change the Right Hand Side (RHS) value of this property to the new label. This changes the name of the menu group.

---

In the `xlWebAdmin.properties` file, the property name for a menu item display label has the form `menuItem.menu group code.menu item code` with the spaces replaced by hyphens. For menu item with code Request New Resources under menu group with code My Resources, the property name is `menuItem.My-Resources.Request-New-Resources`.

6. Locate the property name in the `xlWebAdmin.properties` file.
7. Change the RHS value of this property to the new label. This changes the name of the menu item.

---

## Customizing Search Pages

When using the Administrative and User Console to manage items in the systems (users, groups, and so on) the first page a user sees is a search page. For example, when a user clicks on the **Manage Users** link, the Manage Users page appears with four drop-down menus for searching for users. You can customize the number of drop-down menus, and what the items in the drop-down menus are.

When the search results display, you can determine the size of the results table (the maximum number of rows displayed on each page). After a user selects an item from the results table, a detail page appears (**User Detail**, **Group Detail**, and so on). The detail page contains an additional details drop-down menu. You can customize the items in these drop-down menus.

### Customizing Drop-Down Menu Item Content

Use the Java Client to change the look up codes for search pages and additional details. To customize drop-down menus:

1. Log in to the Java Client.
2. Open the Lookup Definition form (**Xellerate Administration > Lookup Definition**).
3. Search to locate the desired lookup definition.  
  
**Hint:** For your search criteria, use **lookup.webclient\*** search to find the search pages, or **\*additional\_details** to find the additional details.
4. Make the desired changes to the lookup codes to set the options displayed in the drop-down menu for each search page.
  - The Code Key is the meta data for each column.
  - The Decode value is what is displayed in the Administrative and User Console.
  - The order the items appear in the Code Key list are the order they appear in the Administrative and User Console drop-down list. If you delete an entry and add it back in, it appears last in the list.
5. Save your changes.

### Customizing the Number of Drop-down Menu Items and Search Results

Edit the `xlWebAdmin.properties` file to change the number of drop-down menus, and the maximum number of search results on each page. See the [Accessing](#)

[Administrative and User Console Customization Files](#) section for details on how to access the `xlWebAdmin.properties` file and how to redeploy the EAR file.

To set the number of drop-down menus:

1. Open the `xlWebAdmin.properties` file.
2. Locate the property from the following table, and edit it as desired.

**Properties that determine the number of drop-down menus that appear on a search page.**

Property Name	Default	Page
<code>global.property.numsearchuserfields</code>	4	Search Users
<code>global.property.numsearchaccesspolicyfields</code>	2	Access Policies
<code>global.property.numsearchresourcefields</code>	3	Search Resources
<code>global.property.numsearchgroupfields</code>	1	Search groups
<code>global.property.numsearchopentaskfields</code>	2	My Open Tasks

3. To change the maximum number of search results on each page, change the value of the property `global.displayrecordNum.value` to the desired value (the default is 10).
4. Save the file.
5. Redeploy the EAR file.

---

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