

**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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## **Related Documents**

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 Guide for JBoss*
- *Oracle Identity Manager Installation Guide for WebLogic*
- *Oracle Identity Manager Installation Guide for WebSphere*
- *Oracle Identity Manager Best Practices Guide*
- *Oracle Identity Manager Globalization Guide*
- *Oracle Identity Manager Design Console Guide*
- *Oracle Identity Manager Administrative and User Console Guide*
- *Oracle Identity Manager Tools Reference Guide*
- *Oracle Identity Manager Audit Report Developer Guide*
- *Oracle Identity Manager API Usage Guide*
- *Oracle Identity Manager Glossary of Terms*

## **Documentation Updates**

Oracle is committed to delivering the best and most recent information available. For information about updates to the Oracle Identity Manager 9.0 documentation set, visit Oracle Technology Network at

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

## **Conventions**

The following text conventions are used in this document:

<b>Convention</b>	<b>Meaning</b>
<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.

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<b>Convention</b>	<b>Meaning</b>
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

---



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, user initiated profile editing, and related approvals
- Field configuration on pages
- Menu selections that are available to users

To configure the various aspects of the Administrative and User Console, you edit certain files. These files and how to edit them are described in the various sections of this Guide. For example, to learn how to customize the general page layout, see [Chapter 2, "Customizing General Page Layout"](#).

**See Also:** *Oracle Identity Manager Globalization Guide* for information on how to globalize Oracle Identity Manager Administrative and User Console

## Accessing Administrative and User Console Customization Files

During installation, Oracle Identity Manager is deployed to your application server as an Enterprise ARchive (EAR). This archive file contains some of the files for customizing your Administrative and User Console, for example `Xellerate.css`, `xlWebAdmin.properties`, and `xlDefaultAdmin.properties`. The name of the EAR file varies depending on your application server, as follows:

- JBoss or OC4J—`XellerateFull.ear`
- WebSphere—`Xellerate.ear`
- WebLogic—`WLXellerateFull.ear`

To access the files for customizing your client, you 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:** Oracle recommends that you back up any files before modifying them.

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3. Create a new archive file called `x1WebApp.war` using the `jar` utility.
4. Copy (and overwrite) the `x1WebApp.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.

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## Customizing General Page Layout

This chapter describes how to customize the overall layout of the pages within your Oracle Identity Manager Administrative and User Console. It contains these topics:

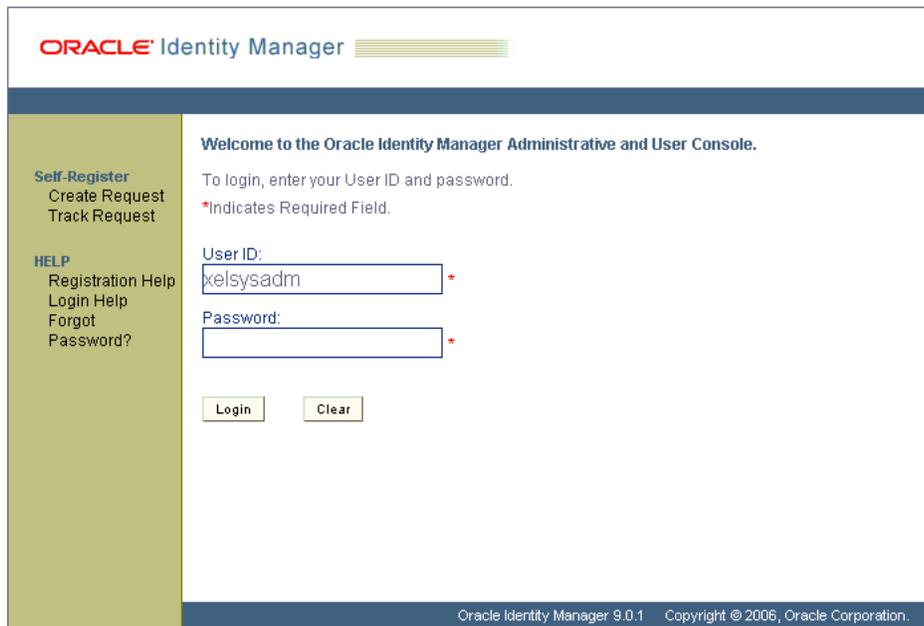
- [Overview of Page Layout Customization](#)
- [Files to Modify](#)
- [Example of How to Customize Your General Page Layout](#)

### Overview of Page Layout Customization

Page layout customization 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 Oracle Identity Manager Administrative and User Console page is 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**



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**Note:** This chapter assumes you are a developer familiar with JSPs and Struts. In addition, because editing the files mentioned in this chapter controls how the pages are rendered, and potentially introduces cosmetic anomalies, Oracle recommends that you test the effects of your changes before releasing them into a production environment.

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## Files to Modify

To customize page layout, you edit these files:

```
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 to the right of the header banner and the Oracle Identity Manager product logo to appear on the left, do the following:

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 refer to the following:
  - `global.image.clientlogo`  
This reference by default points to the Oracle Identity Manager logo, or the product logo.
  - `global.image.xelleratologo`  
This reference points to a placeholder image. If you want to add another image, replace this logo.

2. Swap the references to these two property variables within the file. For example, 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.xelleratologo" />
</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.xelleratologo" />
</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. Test the display of your Administrative and User Console to ensure that the intended changes have taken effect. Do this by reloading the Administrative and User Console page.



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## Customizing Text

This chapter describes how to customize the descriptive text and labels that appear on the pages of your Oracle Identity Manager Administrative and User Console. It also describes how to edit the error messages that appear under the specific conditions that generate them.

You can customize the following text:

- 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

This chapter contains these topics:

- [Files to Modify](#)
- [Customizing Descriptive Text and Labels](#)

### Files to Modify

To customize text, you edit the `xlWebApp\WEB-INF\classes\xlWebAdmin.properties` file (or the locale-specific properties file).

### Customizing Descriptive Text and Labels

The text the client displays is contained in the `xlWebAdmin.properties` file. For any label, procedural instruction, or error message that you want to edit, Oracle recommends that you do the following:

1. Access the JSP page in which that text appears.
2. Reference the property associated with that text.
3. Lookup that property name in the `xlWebAdmin.properties` file.

Properties that control the text on more than one page, or that are associated with multiple product functionalities, are listed in one of the GLOBAL sections of the file, for example, GLOBAL messages. These 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 labeled in a function-specific manner, for example, `MANAGE USER` labels.

The widths of labels in the Workflow Visualizer are calculated by converting pixel lengths to character lengths. An incorrect conversion can result in truncated text or extra white space surrounding the label. The `xlRichClient.properties` file, or locale-specific file (such as `xlRichClient_jp.properties` for Japanese), contains a property named `global.workflowRenderer.labelWidthFactor` that is used in the conversion of label text from pixel length to character length. To modify the widths of labels in the Workflow Visualizer, modify the integer value that is assigned to this property. A higher integer will increase label widths while a lower integer will decrease them.

**See Also:** ["Accessing Administrative and User Console Customization Files"](#) on page 1-1 for details on how to access the `xlWebAdmin.properties` file.

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## Customizing Colors, Fonts and Alignment

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

### Files to Modify

To customize colors, fonts, and alignments, you edit the `x1WebApp\css\Xellerate.css` file (or the locale-specific CSS file).

### How to Customize the 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. Once you have determined how you want to edit the appearance of the Console, Oracle recommends that you do the following:

1. View the source for the page.
2. Determine the style sheet class associated with the element on the page that you want to change.
3. Lookup that class name within the `Xellerate.css` file.

The `Xellerate.css` file contains context labels. Use them to locate the class to edit when customizing 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 the HTML elements they affect—for example, links, tables, checkboxes.

**See Also:** "[Accessing Administrative and User Console Customization Files](#)" on page 1-1 for details on how to access the `Xellerate.css` style sheet.



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## Customizing Logos

This chapter describes how to add your own corporate logo or that of your customers or partners to your Oracle Identity Manager Administrative and User Console. You do this by copying a logo file into the EAR file, and editing the relevant values in the `xlDefaultAdmin.properties` file. 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.

Figure 5–1 shows the default logo that appears on the Oracle Identity Manager Administrative and User Console login page.

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



**See Also:** [Chapter 2, "Customizing General Page Layout"](#) for instructions on how to align logos within the banner region

### Files to Modify

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

### Replacing the Product Logo

To replace the default Oracle Identity Manager logo that appears to the left in the uppermost banner:

1. Place the GIF image file that contains your logo in the `\xlWebApp\images` directory.
2. Open the `xlDefaultAdmin.properties` file.
3. In the `xlWebAdmin.properties` file, locate the GLOBAL images section. In that section, set the property `global.image.clientlogo` to the full path and name of the image file that contains the desired logo, for example, `/images/mycorporate_logo.gif`. The default value of this property is `/images/client_logo.gif`.
4. Redeploy the Enterprise ARchive (EAR) file. The name of the EAR file varies depending on your application server, as follows:
  - JBoss or OC4J—`XellerateFull.ear`

- WebSphere—Xellerate.ear
- WebLogic—WLXellerateFull.ear

**See Also:** ["Accessing Administrative and User Console Customization Files"](#) on page 1-1 for details on how to access the `\xlWebApp\images` directory and the `xlDefaultAdmin.properties` file and how to redeploy the EAR file

## Inserting Your Company Logo

To replace the placeholder image that appears to the right in the uppermost banner:

1. Place the image file that contains your logo in the `\xlWebApp\images` directory.
2. Open the `xlDefaultAdmin.properties` file.
3. Locate the GLOBAL images section and set the `global.image.xelleratelogo` property to the full path and name of the image file that contains the desired logo, for example, `/images/myproductbrand_logo.gif`. The default value of this property is `/images/xellerate-trans-grey.gif`.
4. Re-deploy the `Xellerate.ear` file.

**See Also:** ["Accessing Administrative and User Console Customization Files"](#) on page 1-1 for details on how to access the `\xlWebApp\images` directory and the `xlWebAdmin.properties` file and how to redeploy the EAR file.

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## Customizing Self-Registration, User Profile Management, and Service Accounts

This chapter explains 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. It also explains how to customize service accounts, that is, general administrator accounts shared by several users and used for maintenance purposes.

For the self-registration process, you can customize:

- Whether self-registration is allowed
- Which fields can 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 can customize:

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

This chapter contains these topics:

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

### Files to Modify

To customize self-registration, self-editing of profiles, and service accounts, you edit this file:

```
<XL_HOME>\xellerate\config\FormMetaData.xml
```

In addition, you must edit the relevant records within the Oracle Identity Manager Design Console.

## Customizing Self-Registration Options

This section explains 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:

1. Log in to the Oracle Identity Manager Design Console.
2. Access the System Configuration form by navigating to Administration, then to System Configuration.
3. Query to find the `Is Self-Registration Allowed?` property.
4. Set the value to `TRUE` to allow users to self-register, or to `FALSE` to disallow users from self-registering.
5. Save the changes.

### Defining Custom Fields for the User Information Pages

On the user self-registration and profile pages of the Console, there are several fields already defined for user information. You can create custom fields for users to enter information when they are self-registering or editing their profiles.

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**Note:** The default system fields on the self-registration pages are listed in the `FormMetaData.xml` file, in the `<!-- User Self Registration and User Profile Modification section -->` section

---

---

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

1. Log in to the Oracle Identity Manager Design Console.
2. Access the User Defined Field Definition form by navigating to Administration, and then to User Defined Field Definition.
3. Query to find the Users form.
4. Create a user-defined field, for example, a social security number, as explained in the *Oracle Identity Manager Design Console Guide*.
5. Save and close the User Defined Fields form.
6. In a text editor, open the Oracle Identity Manager `FormMetaData.xml` file, and locate the section `<!-- User Self Registration and User Profile Modification section -->`.
7. To define the attribute, add an entry for it in the following format:

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

where

- `identifier` is the name used to specify this field when you define a page.
- `field_label` is the word displayed to the user next to the field in the Administrative and User Console.
- `datatype` is the data type of the field displayed in the Console.

- `database_column` is the database column name, specified when you created the field definition using the Design Console. User-defined fields are prefixed with `USR_UDF_`, so if you typed in `SSN` in the Design Console, 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 Design Console 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 self-register. To display a custom field, you must reference it in the section of the `FormMetaData.xml` file for the self-registration user page. This is explained in ["Defining Custom Fields for the User Information Pages"](#) on page 6-2.

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` specifies 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 Console, remove the row from the `<Form name="SelfRegistrationUserForm">` section that represents the field.

---



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## Specifying Whether Approvals are Required for Self-Registration

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

To specify that approvals are *not* required for self-registration:

1. Ensure that the user registration approval process does not contain any non-conditional tasks.
2. Ensure that no fields on the registration-related approval pages are set as required that are not also present on the User Self-Registration page.

**See Also:** ["Defining Custom Fields for the User Information Pages"](#) on page 6-2 to find which section of the `FormMetaData.xml` file to edit

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**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 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.

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## Customizing Self-Initiated Profile Management Options

By default, all users, once registered, are able to edit their own profile information. You can control which fields within their profile they can edit, whether approvals must be obtained to allow these edits, and, if so, which fields the approver can 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 `ProfileModificationUserForm`.
3. Set the `editable` parameter to `TRUE` for each of the fields you want to enable users to edit.
4. Save and close the file.

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

To specify that approvals are required for user-initiated profile changes, ensure that the User Profile Edit approval process contains at least one manual non-conditional task.

To specify that approvals are *not* required for user-initiated profile changes:

1. Ensure that the User Profile Edit approval process does not contain any non-conditional tasks.
2. Ensure that no fields on the profile update-related approval pages are set as required that are not also present on the Modify Account Profile page.

**See Also:** ["Defining Custom Fields for the User Information Pages"](#) on page 6-2 for the section of `FormMetaData.xml` file to edit

## 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 want to enable users to edit.
4. Save and close the file.

## Customizing Service Accounts

Service accounts are general administrator accounts—for example, `admin1` and `admin2`—that are used for maintenance purposes. They are typically shared by a set of users. Usually these accounts enable a system, as opposed to a user, to interact with another system. The model for managing and provisioning service accounts is slightly different from normal provisioning.

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

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## Service Account Behavior

Here are some features of service account behavior:

- Service accounts are requested, provisioned, and managed in the same way as regular accounts. A service account is similar to a regular account, in that it uses the same resource object, provisioning processes, and process/object forms. It differs from a regular account by a flag. This flag is set by the user requesting 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 either change occurs, Service Account Changed task functionality is triggered.
- When a user is deleted, the resource is not revoked (the provisioning process for the service account will not be cancelled), causing the undo tasks to trigger. Instead, a task should get inserted into the provisioning process in 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 will 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 either directly or through a request is managed in the same way as for regular accounts.
- Oracle Identity Manager API can be used to transfer a provisioned service account resource—for example, a 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

You can change a regular account to a service account or change a service account to a regular account. In either case, the Service Account Change task is inserted within the

provisioning process and becomes active in the Tasks tab of the Process Definition. Any adapter associated with this provisioning process is executed. If there is no adapter, then a predefined response code is 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. You can use this task to initiate the appropriate actions in response to any disabling event that occurred for the user.

An alert task is inserted when a user is disabled or deleted. In these cases, this is the only action that happens to the service account instance.

An alert task is not inserted for events directly on the service account—for example, when a service account is explicitly disabled.

## Moving Service Accounts

You can transfer ownership of a service account from one user to another. When you do this, the provisioning instance shows 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 is executed. If there is no adapter, then a pre-defined response code is 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.

---



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## 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. You can customize that behavior in the following ways:

- 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.

This chapter contains these topics:

- [About the FormMetaData.xml File](#)
- [Defining a New Field](#)
- [Files to Modify](#)
- [Setting Field Configuration](#)

### About the FormMetaData.xml File

Use the `FormMetaData.xml` file to define form controls and labels in the Administrative and User Console. You can also edit how the default fields behave, for example, you can make them viewable, editable or required. For all entries in the `FormMetaData.xml` file, the attributes section defines the fields included in the pages while the attribute references sections define the fields on a particular page or group of pages. To define a new value property for this file, you must define the attribute, and then reference it for a page.

The following table lists the forms that are depending on the `FormMetaData.xml` file.

---

#### 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="SelfRegistrationApprovalForm">
```

### FormMetaData.xml File Sections

User profile modification form	<Form name="ProfileModificationUserForm >
User profile modification Approval form	<Form name="ProfileModificationApproval Form">
<!-- User Management section -->	
User form	<Form name="3">
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	Use the Manage link under Users, then execute a query and select a particular user account.
Create User	Use the Create link under Users.
User Self Registration	Use the Create Request link under Self-Registration.
Modify Account Profile	Use the Account Options link. Then click Modify Account Profile.
Edit User	Use 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	Use 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	Use the Manage link under Organizations, then execute a query and select a particular organization.
Create Organization	Use the Create link under Organizations.
Group Detail	Use the Manage link under User Groups, then execute a query and select a particular user group.
Create User Group	Use the Create link under User Groups.
Resource Detail	Use the Manage link under Resource Management, then execute a query and select a particular resource.

**Note:** Any pages that are not listed in the preceding table obtain their label names from the xlWebAdmin.properties file or the corresponding locale-specific properties files.

For each of these pages, Oracle Identity Manager is preconfigured with certain system fields. In addition, you can define the 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 by using the User Defined Field Definition form of the Oracle Identity Manager Design Console as explained in *Oracle Identity Manager Design Console Guide*.

Once you have created the user-defined field within the Oracle Identity Manager Design Console, you then also add it to the list of attributes in the section `<!-- User Self Registration and User Profile Modification section -->` of the `FormMetaData.xml` file. Do not add it to the list in the `<!--User Management -->` section of that 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 Design Console
- `Label`—Does not need to conform to label specified for this field in the Design Console
- `DisplayComponentType`—Must be same as the value of Field Type for this field in the Design Console
- `DataLength`—Must be same as the value of Length for this field in the Design Console
- `Map`—Must be the same as the column name for this field in the Design Console

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

---

## Defining a New Field

To define a new field for the Console:

1. Create the field definition by using the Design Console. 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 using the same information you entered when you used the Design Console to create a field definition. To do this, 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` specifies the associated property name in the `xlWebAdmin.properties` file or the locale-specific file.
- `displayComponentType` is the data type of the field displayed in the Console.
- `map` is the database column name specified when you created the field definition using the Design Console. User-defined fields are prefixed with

USR\_UDF\_, so if you typed in SSN in the Design Console, 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.

## Files to Modify

To customize field behavior and functionality, you edit the following file:  
`FormMetaData.xml`.

## Setting Field Configuration

This section explains how to configure fields in various pages. It contains these topics:

- [For Fields in the User Detail, Create User, and Edit User Pages](#)
- [For Fields in the User Self Registration, Create User Request, and Modify Account Profile Pages](#)
- [Example: Setting the User ID Field on the Create User Request Page](#)

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

Fields available for use within the Create User, User Detail, and Edit User pages are controlled by the attribute definition within the `<!-- User Management section -->` of the `FormMetaData.xml` file.

Fields displayed on each of these pages are controlled by using the attribute references in the `<!--Fields that will be displayed on the Users form section-->` section of the `FormMetaData.xml` file

For each attribute reference, you can 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.

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### 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 by using the attribute references in the following sections of the `FormMetaData.xml` file

Section	Page Affected
<Form name="SelfRegistrationUserForm">	User Self Registration
<Form name="SelfRegistrationApprovalForm">	Create User Request
<Form name="ProfileModificationUserForm">	Modify Account Profile

For each attribute reference, you can 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

### Example: Setting the User ID Field on the Create User Request Page

This example shows how to make the system field User ID on the Create User Request page viewable, editable, and required.

1. Open the `FormMetaData.xml` file
2. Locate the section `<!-- Definition of the form that will be displayed to the approver(s) for self registration approvals -->`.
3. Add an attribute reference to this section 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.

---



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## Customizing Menus

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

To customize the menus in the Console:

1. Identify the menu group or item that you want to customize and 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` or `xlDefaultAdmin.properties` files. The following table identifies the locations of the files for each supported application server.

**Table 8–1 Location of `xlWebAdmin Properties` and `xlDefaultAdmin.properties Files`**

Application Server	Location
OC4J	Files are available in <code>OC4J_HOME\product\10.1.3.1\OracleAS_1\j2ee\home\applications\Xellerate\xlWebApp\WEB-INF\classes</code> .
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> and <code>xlWebApp.war\WEB-INF\classes\xlDefaultAdmin.properties</code> from the WAR file.</li> <li>3. Edit the <code>xlWebAdmin.properties</code> file or <code>xlDefaultAdmin.properties</code> file.</li> <li>4. Repackage the WAR file.</li> <li>5. Repackage the EAR file.</li> </ol>
WebSphere	Files are available in <code>WS_HOME\installedApps\&lt;cell_name&gt;\Xellerate.ear\xlWebApp.war\WEB-INF\classes</code> .

**Table 8–1 (Cont.) Location of xlWebAdmin Properties and xlDefaultAdmin.properties**

<b>Application Server</b>	<b>Location</b>
WebLogic	<p><b>Admin Server:</b> The files are available in WL_HOME\ user_projects\domains\&lt;&lt;domain_name&gt;\XLApplications\ XLXellerateFull.ear\ xlWebApp.war\WEB-INF\classes.</p> <p><b>Managed Server:</b> The files available in WL_Home\ user_projects\domains\&lt;&lt;domain_name&gt;\ &lt;managed_server&gt;\stage\Xellerate\xlWebApp.war\ WEB-INF\classes</p>

3. To modify a menu group, locate in the xlWebAdmin.properties file 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 (-). For example, 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. 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 menu item display label property is defined in the xlWebAdmin.properties file and the menu item link property is defined in the xlDefaultAdmin.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. 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 first create the correct entries in the system using the Form Information form in the Oracle Identity Manager Design Console. Next, you 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. Add the following properties to the xlWebAdmin.properties file by using the class names specified in step 5:

```
menuGroup.My-Links=My Links  
menuGroup.My-Links.Favorites=Favorites  
menuGroup.My-Links.Non-Work-Links=Non-Work Links
```

7. Add the following properties to the xlDefaultAdmin.properties file by using the class names specified in step 5:

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

---

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



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## Customizing Group Menu Item Access

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

This chapter contains these topics:

- [Setting Menu Items for Groups](#)
- [Creating New Menu Items for Groups](#)
- [Assigning a Menu Item to a Group](#)
- [Removing a Menu Item from a User Group](#)
- [Renaming a Menu Item](#)

### Setting Menu Items for Groups

You can set the menu items for groups you manage by using the group menu items page. Menu items listed in the group menu items page are available to that group. You can add items to the page and remove items from it. 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.

## Creating New Menu Items for Groups

To create new menu items for groups, you add entries using the Form Information form. Then you add the corresponding properties.

Table 9–1 presents the complete list of Oracle Identity Manager Administrative and User Console menu items to which a user group can be granted access:

**Table 9–1 Administrative and User Console Menu Items to Which Groups Can Be Added**

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.
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.

**Table 9–1 (Cont.) Administrative and User Console Menu Items to Which Groups Can Be**

Menu Item Name	Function
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.
Create Generic Technology Connector	Allows the user to create a generic connector
Manage Generic Technology Connector	Allow the user to view, edit and otherwise manage a generic connector

## Assigning a Menu Item to a Group

To assign a menu item to a user group, do the following:

1. Log in to the Administrative and User Console as an administrator.
2. Click **User Groups** then **Manage**.
3. Search to find the group to which you want to assign a menu item.
4. Select the group name.
5. From the **additional details** menu, select **Menu Items**.
6. Click **Assign Menu Items**. The Assign Menu Items page appears.
7. 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.

---

8. Click **Assign**.
  9. 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.

## Removing a Menu Item from a User Group

To remove a menu item from a user group, do the following:

1. Log in to the Administrative and User Console as an administrator.
2. Click **User Groups**, then click **Manage**.
3. Search to find the group from which you want to remove the menu item.
4. Click the group name.
5. From the **Additional Details** menu, select **Menu Items**.
6. Select the **Delete** option for each of the desired menu items.

7. Highlight the Administrative and User Console menu item you wish to prevent the user group from accessing.
8. Click **Delete**.
9. Click **Confirm Delete**.

## Renaming a Menu Item

To rename a menu item, do the following:

In order to change the menu group or item names, only the `xlWebAdmin.properties` file or locale-specific file (such as the `xlWebAdmin_jp.properties` file for Japanese) 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 users, groups, and other items, 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 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 maximum number of rows in the results table displayed on each page. After a user selects an item from the results table, a detail page appears, for example, User Detail, Group Detail, and so on. The detail page contains an additional details menu. You can customize the items in these menus.

### Customizing Drop-Down Menu Item Content

Use the Design Console to change the lookup codes for search pages and additional details. To customize drop-down menus:

1. Log in to the Design Console.
2. Open the Lookup Definition form by navigating to Administration, then to Lookup Definition.
3. Search to locate the desired lookup definition.

**Tip:** 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

To change the number of drop-down menus, and the maximum number of search results on each page, edit the `xlDefaultAdmin.properties` file.

**See Also:** ["Accessing Administrative and User Console Customization Files"](#) on page 1-1 for details on how to access the `xlDefaultAdmin.properties` file and how to redeploy the EAR file.

To set the number of drop-down menus:

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

**Table 10–1 Properties that Determine the Number of Menus 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
<code>global.property.numsearchattestationprocessfields</code>	3	Attestation Process

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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