Oracle® Fusion Middleware

Help Topics for Oracle Identity Governance

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Oracle Fusion Middleware Help Topics for Oracle Identity Governance, 12c (12.2.1.3.0)

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Preface

The Oracle Fusion Middleware Help Topics for Oracle Identity Governance introduces you to Oracle Identity Self Service UI, and System administration UI.

Audience

This guide is intended for users who can log in to Oracle Identity Self Service and perform self-service operations, request for roles and resources, and manage various approval, provisioning, and certification tasks. This guide is also intended for delegated administrators who can perform identity administration tasks and define authorization policies to delegate administration privileges. In addition, a user with any role can refer to this guide for an introduction and conceptual information about Oracle Identity Governance.

Documentation Accessibility

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Related Documents

For more information, see the other documents in the Oracle Identity Management documentation set for this release.

- *Oracle Fusion Middleware Administering Oracle Identity Governance*
- *Oracle Fusion Middleware Developing and Customizing Applications for Oracle Identity Governance*
- *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Manager*

Conventions

The following text conventions are used in this document:

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

Part I

Identity Self Service

Oracle Identity Self Service enables you to perform various functions, such as viewing and creating user accounts, modifying profiles, creating and managing roles, organizations, and managing requests, approvals, and certification tasks.

The following topics are covered:

- Unauthenticated Self Service
- Self Service
- Manage
- Compliance
- Customize
- Inbox

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Unauthenticated Self Service

Oracle Identity Manager enables you to perform certain tasks before you log in to the Oracle Identity Self Service or Oracle Identity System Administration interfaces.

The Oracle Identity Manager login page provides the login functionality and the unauthenticated self-service tasks.

- Sign in
- Forgot User Login
- Forgot Password
- New User Registration
- Track My Request

Sign in

The login page provides the ability to log in, and provides a starting point for all unauthenticated operations.

Use the Log in page to login to Oracle Self Service or to access unauthenticated self-service tasks in the Unauthenticated Self Service Console. Users who have not authenticated into, or not logged in to Identity Self Service can access the Unauthenticated Self Service Console by clicking the Forgot User Login?, Forgot Password?, New User Registration, or Track My Registration links.

Element	Description
User ID	The user ID of the user who has to log into Oracle Identity Self Service.
Password	The password of the user who has to log into Oracle Identity Self Service.
Sign in	Click **Sign-in** to log into Oracle Identity Self Service.
Forgot User Login?	Click **Forgot User Login?** if you do not remember your User login credential.
Forgot Password?	Click **Forgot Password?** if you do not remember your password credential.
New User Registration	Click **New User Registration** to self-register to the Oracle Identity Manager. User Registration page is displayed.
Track My Registration	Click **Track My Registration** to track your self-registration request.

Related Topics

Connecting to Oracle Identity Self Service in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Forgot User Login

Please identify yourself

Use the Forgot User Login page if you have forgotten your user login.

Element	Description
E-mail Address	Enter the email address associated with your user login.
Cancel	Click **Cancel** to close the Forgot User Login page without making any changes.
Submit	Click **Submit** to submit the changes. An email is sent to the specified email address with further instructions.

Related Topics

Retrieving Forgotten User Login in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Forgot Password

Use the Forgot Password page to reset your forgotten password.

Identify Yourself

Element	Description
User Login	The user login ID of the user who has to reset the Oracle Identity Self Service password.
Cancel	Click **Cancel** to cancel the changes made to the page.
Next	Click **Next** to navigate to the Answer Challenge Questions page.

Answer Challenge Questions

Element	Description
Please answer your challenge questions	Answer atleast 3 challenge questions below with the answers you set during registration.
What is your mother's maiden name?	The challenge Question 1 selected from the drop-down during creation of account.

Element	Description
What is the name of your pet?	The challenge Question 2 selected from the drop-down during creation of account.
What is the city of your birth?	The challenge Question 3 selected from the drop-down during creation of account.
Cancel	Click **Cancel** to cancel the changes made to the page.
Back	Click **Back** to navigate to the Identify Yourself page.
Next	Click **Next** to navigate to the Select A New Password page.

Select A New Password

Element	Description
Enter new password	Enter your password.
Re-enter new password	Re-enter your password.
	Displays the applicable Password Policy Rules.
Cancel	Click **Cancel** to cancel the changes made to the page.
Back	Click **Back** to navigate to the Answer Challenge Questions page.
Save	Click **Save** to save the changes.

Related Topics

Resetting Forgotten Password in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

New User Registration

User Registration

Use the User Registration page to register yourself with Oracle Identity Governance.

Element	Description
Basic Information	Provide your basic information in this section.
Enter User Id and Password	Provide User ID and password information in this section.
Select your challenge questions and answers	Provide challenge questions and answers in this section which are used if you forget your password and need to reset it.
Cancel	Click **Cancel** to cancel the changes.

Element	Description
Register	Click **Register** after you enter all the mandatory information. A confirmation message with tracking request number is displayed. Click **Finish**.

Basic Information

Element	Description
First Name	Enter your first name.
Middle Name	Enter your middle name.
Last Name	Enter your last name. This is a mandatory field.
E-mail	Enter your email id. This is a mandatory field.
Confirm E-mail	Re-enter your email id. This is a mandatory field.
Common Name	Enter your common name.
Display Name	Enter the name you would want to display on the UI. If not specified, then it is auto-generated while creating the user.

Enter User Id and Password

Element	Description
User Login	Enter your user login name for Oracle Identity Self Service.
Password	Enter your password.
Confirm Password	Re-enter your password.
	Displays the applicable Password Policy Rules.

Select your challenge questions and answers

Element	Description
Question 1	Select the challenge question from the drop-down.
Answer 1	Enter the answer for Question 1.
Question 2	Select the challenge question from the drop-down.
Answer 2	Enter the answer for Question 2.
Question 3	Select the challenge question from the drop-down.
Answer 3	Enter the answer for Question 3.

Related Topics

Submitting Registration Requests in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Track My Request

Track Requests

Use the Track My Request page to Track your registration request.

Element	Description
Tracking ID	Enter the tracking Registration Request Number that has been assigned to your registration request.
Cancel	Click to cancel the changes made to the page.
Submit	Click to view the status of your request, Date of the request and Tracking ID. The status would be one of the following: • **Pending:** This state indicates that the request is submitted and the approval is pending. • **Rejected:** This state indicates that the request is rejected during approval. The description indicates the reason of rejection. • **Completed:** This state indicates that the request is completed. • **Failed:** This state indicates that the request is failed during submission.
Track Another Registration	Click to check the status of another registration request.
Back To Login	Click to go back to login page.

Related Topics

Tracking Registration Requests in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

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Self Service

Managing self service tasks include viewing and modifying profile information, and requesting for access that are subject to approval.

The Self Service tab consists of the following pages:

- Self Service Home
- My Information
- My Access
- My Access - Roles
- My Access - Entitlement
- My Access - Account
- Request Access for Self
- Request Access for Others
- Track My Request
- Provisioning
- Manual Fulfillment Task
- Edit Fulfillment Task
- Pending Violations
- Violation Details
- Pending Approvals
- Pending Certifications
- Certification Details

Self Service Home

Use the Self Service Home page to manage personal details, approval, certification, and provisioning tasks.

Element	Description
My Information	Click to view and modify personal details.
My Access	Click to display the entities such as Roles, Entitlements, Accounts, and Admin Roles, to which you have access.
Request Access	Click to request for access for self or for other users.

Element	Description
Track Requests	Click to search for and track requests raised by you and requests raised for you. You can search for requests based on request ID, status, request type, requested date, beneficiary, and requester.
Provisioning Tasks	Click to take action on fulfillment tasks assigned to you.
Certifications	Click to review and take action on pending certification review tasks.
Pending Approvals	Click to take action on requests assigned to you for approvals.
Pending Violations	Click to take action on identity audit policy violations assigned to you.

Related Topics

Self Service Home page in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

My Information

Use the My Information page to view and modify personal details.

Basic User Information

The Basic User Information section in My Information page, displays your profile attributes.

Element	Description
First Name	The first name of the user.
Middle Name	The middle name of the user.
Last Name	The last name of the user. Last name field is a mandatory field.
E-mail	The user’s e-mail address.
Display Name	The user's display name (usually the first and last name).
Manager	The reporting manager details of the user.
User Login	The user login of the user.
Telephone	The telephone number of the user.
Locale	The location of the user.
Timezone	The timezone of the user.
Apply	Click **Apply** to submit the changes.
Cancel	Click to cancel the changes made to the page.

Change Password

The Change Password section allows you to reset your enterprise password.

Element	Description
Old Password	The existing password.
New Password	The new password that you want to set.
	The applicable Password Policy rules.
Confirm New Password	Re-enter the new password.
Apply	Click **Apply** to submit the changes.
Cancel	Click to cancel the changes made to the page.

Challenge Questions

The Challenge Questions section allows you to set the challenge questions and responses.

Element	Description
Question 1	Select the challenge question from the drop-down.
Answer 1	Enter the answer you want to set for challenge question 1.
Question 2	Select the challenge question from the drop-down.
Answer 2	Enter the answer you want to set for challenge question 2.
Question 3	Select the challenge question from the drop-down.
Answer 3	Enter the answer you want to set for challenge question 3.
Apply	Click **Apply** to submit the changes.
Cancel	Click to cancel the changes made to the page.

Direct Reports

The Direct Reports section lists the direct reports of the user in the management hierarchy.

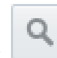
Element	Description
Actions	Choose options from the menu to perform the following operations: • **Open:** Click to open the user details.

Element	Description
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns. • **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.
Open	Click to open the user details.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.
	Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Proxies

The Proxies section allows you to view and manage the proxy information.

Element	Description
Actions	Choose options from the menu to perform the following operations: • **Add:** Click to add new proxy. • **Remove:** Click to remove proxy. • **Refresh:** Click to refresh. • **Remove All:** Click to remove all the proxies. • **Edit:** Click to edit the proxy details.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.

Element	Description
Add	Click to add new proxy. Add Proxy window opens with the below options: • **Proxy Name:** Choose from **My Manager** or **Other User**. • User Name, Click  to search for the user. • **Start Date** • **End Date** • **Cancel** • **Apply**
Remove	Click to remove proxy.
Remove All	Click to remove all the proxies.
Edit	Click to edit the proxy details.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.

Current

Element	Description
Action	Choose options from the menu to perform the following operations: • **Add:** Click Add to include new proxy. • **Remove:** Select a row from the table and click on Remove to delete the row. • **Refresh:** Click Refresh to update the screen with any changes made on the (back-end) server. • **Remove All:** Click to remove all the rows from the table. • **Edit:** Select a row in the table and choose Edit to modify proxy information.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
Edit	Select a row in the table and choose Edit to modify proxy information.
Add	Click on Add to add a new row to the table.
Remove	Select a row from the table and click on Remove to delete the row.

Element	Description
Refresh	Click Refresh to update the screen with any changes made on the (back-end) server.
Remove All	Click to remove all the rows from the table.
Detach	Click to open the table in a larger window.

Related Topics

Managing Profile Information in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

My Access

- Roles
- Entitlement
- Accounts
- Admin Roles

My Access - Roles

- Roles
- Account Access Request
- Remove Roles

Roles

Granted Roles

This lists the roles that are granted to you. This includes both direct and indirect roles.

Element	Description
Actions	• **Request:** The Role Access Request page opens. Catalog tab is displayed. • **Remove:** The Remove Roles catalog page is displayed. • **Open:** The Role page opens. • **Modify Grant Duration:** The Modify Grant Duration dialog box is displayed.

Element	Description
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns. • **Query By Example:** Click to refine the search results by providing additional filters.
Request Roles	The Role Access Request page opens. Catalog tab is displayed.
Remove Roles	The Remove Roles catalog page is displayed.
Open	The Role page opens.
Modify Grant Duration	The Modify Grant Duration dialog box is displayed with the following option: • **Justification** • **Enable Time Selection** • **Start Date** • **End Date** • **OK** • **Cancel**
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.
	Click to refine the search results by providing additional filters.

Pending Roles

This lists the roles that are pending for approval.

Element	Description
Actions	• **Request:** The Role Access Request page opens. Catalog tab is displayed. • **Remove:** The Remove Roles catalog page is displayed. • **Open:** The Role page opens. • **Modify Grant Duration:** The Modify Grant Duration dialog box is displayed.

Element	Description
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns. • **Query By Example:** Click to refine the search results by providing additional filters.
Request Roles	The Role Access Request page opens. Catalog tab is displayed.
Remove Roles	The Remove Roles catalog page is displayed.
Open	The Roles page opens.
Modify Grant Duration	The Modify Grant Duration dialog box is displayed with the following option: • **Justification** • **Enable Time Selection** • **Start Date** • **End Date** • **OK** • **Cancel**
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.
	Click to refine the search results by providing additional filters.

Related Topics

Managing Roles in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Role Access Request

Role Access Request - Add Access

Element	Description
Back	Click **Back** to navigate to the Add Access.
Cancel	Click **Cancel** to cancel the changes made to the page.
Next	Click **Next** to navigate to the Checkout page.
	Click the cart icon to open the Cart window.

Catalog

Element	Description
Roles	Select the Roles from the drop-down.
Search	Enter keyword to search for a particular Role.
Search Button	Click **Search** to initiate the search and populate results in the Search Results table.

Categories

Element	Description
Sort By	Select the sort by option from the drop-down list: • Display Name • Type
Add Selected to Cart	Click **Add Selected to Cart** to add the selected Roles to cart. You can select multiple items in the Search Results table.
Select All	Click to select all the Roles in the Search Results table.
Roles	Click to select all the Roles in the Search Results table.
Add to Cart	Click **Add to Cart** beside the item you want to add to request cart.
In Cart	Shows that item is in the cart.
	Opens the Detailed Information page.
Page	Page number of the Search Result table.
	Click to move to first page in the Search Result table.
	Click to move to previous page in the Search Result table.
	Click to move to previous page in the Search Result table.

Request Profiles

Element	Description
Search	Enter search criteria.
	Click to search.

Checkout - Cart Details

Element	Description
Submit	Click **Submit** to submit entitlement request for approval.
Save As	• **Profile:** Save as profile. • **Draft:** Save as draft.

Request Information

Element	Description
Justification	Enter the request information for role.

Cart Items

Element	Description
Display Name	Lists the items in the cart with the status. Following status can be seen: • : Ready to submit • : Not Ready to submit
	Click to display details of the role.
	Click to remove item from cart.
Request Details	Displays the requested role name.
Update	Click to update the selected role.

Grant Duration

Element	Description
Grant will be effective immediately upon request completion	Select to specify if grant is effective immediately.
Enable Time Selection	Select to enable time zone selection. This displays the **Timezone** drop-down.
Timezone	Select the required time zone from the drop-down.
Start Date:	Click to select the date from when this role is effective.
End Date:	Click to select the date till when this role is effective.

Related Topics

Requesting for Roles in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Remove Roles

To remove roles assigned to you:

Element	Description
Target User	Displays the name of the target user. Click to view the target user details.
Request Information	Enter request information for removing the role.
Cart Items	Displays the items in the cart and its status.
Save As	Click to save request as Draft.
Submit	Click Submit to submit remove accounts request for approval.

Request Information

Element	Description
Justification	Enter the request information for role removal.

Cart Items

Element	Description
Display Name	Lists the items in the cart with the status. Following status can be seen: • : Ready to submit • : Not Ready to submit
	Click to remove item from cart.

Related Topics

Removing Roles in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

My Access - Entitlement

- Entitlement
- Entitlement Access Request
- Modify Entitlement

Entitlement

Element	Description
Actions	• **Request:** The Entitlement Access Request page opens. Catalog tab is displayed. • **Modify:** The Entitlement page opens. • **Modify Grant Duration:** The Modify Grant Duration dialog box is displayed. • **Remove:** The Remove Roles catalog page is displayed.

View	Choose commands from the View menu to control how the columns are displayed:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Detach:** Click to open the table in a larger window.
	• Sort
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Name, Application Instance, or Status. Ascending or Descending.
	    * Then By: Name, Application Instance, or Status. Ascending or Descending.
	    * Then By: Name, Application Instance, or Status. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to refine the search results by providing additional filters.

Request Entitlements	The Entitlement Access Request page opens. Catalog tab is displayed.
Modify Entitlements	The Remove Roles catalog page is displayed.
Modify Grant Duration	The Modify Grant Duration dialog box is displayed with the following option: • **Justification** • **Enable Time Selection** • **Start Date** • **End Date** • **OK** • **Cancel**
Remove Entitlements	The Remove Entitlements catalog page is displayed.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.

Element	Description
Detach	Click to open the table in a larger window.
Query By Example	Click to refine the search results by providing additional filters.

Related Topics

Managing Entitlements in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Entitlement Access Request

Entitlement Access Request

Element	Description
Back	Click **Back** to navigate to the Add Access page.
Cancel	Click **Cancel** to cancel the changes made to the page.
Next	Click **Next** to navigate to the Checkout page.
Add Access	Click **Add Access**to open the Add Access page.
Checkout	Click **Checkout** to open the Checkout page.
	Click the cart icon to open the Cart window.

Catalog

Element	Description
Application	Select the Application Instance from the drop-down.
Search	Enter keyword to search for a particular Application Instance.
Search Button	Click **Search** to initiate the search and populate results in the Search Results table.

Categories

Element	Description
Sort By	Select the sort by option from the drop-down list: • Display Name • Type

Element	Description
Add Selected to Cart	Click **Add Selected to Cart** to add the selected Application Instance to cart. You can select multiple items in the Search Results table.
Select All	Click to select all the Application Instance in the Search Results table.
Entitlement	Click to select all the Entitlements in the Search Results table.
Add to Cart	Click **Add to Cart** beside the item you want to add to request cart.
In Cart	Shows that item is in the cart.
	Opens the Detailed Information page.
Page	Page number of the Search Result table.
	Click to move to first page in the Search Result table.
	Click to move to previous page in the Search Result table.
	Click to move to previous page in the Search Result table.

Request Profiles

Element	Description
Search	Enter search criteria.
	Click to search.

Checkout - Cart Details

Element	Description
Submit	Click **Submit** to submit entitlement request for approval.
Save As	• **Profile:** Save as profile. • **Draft:** Save as draft.

Request Information

Element	Description
Justification	Enter the request information for entitlement.

Cart Items

Element	Description
Display Name	Lists the items in the cart with the status. Following status can be seen: • : Ready to submit • : Not Ready to submit
	Click to display details of the entitlement.
	Click to remove item from cart.
Update	Click to update the selected entitlement.

Grant Duration

Element	Description
Grant will be effective immediately upon request completion	Select to specify if grant is effective immediately.
Enable Time Selection	Select to enable time zone selection. This displays the **Timezone** drop-down.
Timezone	Select the required time zone from the drop-down.
Start Date:	Click to select the date from when this entitlement is effective.
End Date:	Click to select the date till when this entitlement is effective.

Related Topics

Requesting for Entitlements in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Modify Entitlement

Modify Entitlement Options

Element	Description
Target User	Displays the name of the target user. Click to view the target user details.
Request Information	Enter request information for modification.
Cart Items	Displays the items in the cart and its status.
Save As	Click to save request as Draft.
Submit	Click Submit to submit modification request for approval.

Cart Items

Element	Description
Display Name	Lists the items in the cart with the status. Following status can be seen: • : Ready to submit • : Not Ready to submit
	Click to display details of the entitlement.
	Click to remove item from cart.

Request Details - Edit Entitlement details

Element	Description
Optional: Access Expiration	Select date by clicking on icon.
Requester Job Title	Enter requester's job title
What group are you from	Click the icon. It opens the Search and Select window.
Level of data access needed	Enter the level of data access needed.
Your Job Function	Enter your job function.
Responsibility Code	Enter responsibility code.
Support Comments	Enter comments.
Ready to submit	Click **Ready to submit** to submit request.

Search and Select: What group are you from

Element	Description
Meaning	Enter the meaning key word for searching.

Element	Description

Advanced	Advanced Search option are listed:
	• Select from:
	  – Contains
	  – Starts with
	  – Ends with
	  – Equals
	• **Search:** Click **Search** to search for the group that you are from.
	• **Reset:** Click **Reset** to reset the search criteria.
	• **Add Fields:** Select other fields to add to the search criteria.
	• **Reorder:** Click Reorder to reorder the search fields. The Reorder Search Field window opens. You can reorder the search fields by selecting the search field and using the appropriate arrow icon to move up or down the list. Click **OK**.

Basic	When Advanced Search option is selected, Basic search button is enabled to allow you to go back to basic search. Click Basic to go to basic search option.
Search	Click **Search** to search for the group that you are from.
Reset	Click **Reset** to reset the search criteria.
OK	Click **OK** to select the group.
Cancel	Click to cancel the changes made to the page.

Related Topics

Modifying Entitlements in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Remove Entitlements

Using the Remove Entitlement screen you can remove entitlements:

Element	Description
Target User	Displays the name of the target user. Click to view the target user details.
Request Information	Enter request information for removal.
Cart Items	Displays the items in the cart and its status.
Save As	Click to save request as Draft.
Submit	Click Submit to submit remove entitlements request for approval.

Request Information

Element	Description
Justification	Enter the request information for entitlements removal.

Cart Items

Element	Description
Display Name	Lists the items in the cart with the status. Following status can be seen: • : Ready to submit • : Not Ready to submit
	Click to display details of the entitlements.
	Click to remove item from cart.

Related Topics

Removing Entitlements in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

My Access - Account

- Account Access Request
- Modify Accounts
- Enable Account
- Disable Accounts
- Remove Accounts

Accounts

Element	Description
Actions	• **Request:** Click **Request** to request for a new account. The Account Access Request page opens. Catalog tab is displayed. • **Modify:** Select the account to be modified from the accounts table and click **Modify**. The Modify Account page opens. • **Modify Grant Duration:** Click **Modify Grant Duration** to modify the grant duration of the account assigned to you or to be assigned to you. The Modify Grant Duration dialog box is displayed. • **Request Entitlement:** Select an account for which you want to request an entitlement and click **Request Entitlement**. The Entitlement Access Request page opens. Catalog tab is displayed. • **Enable:** Select an account that you want to enable and click **Enable**. The Enable Accounts page is displayed. • **Disable:** Select an account that you want to disable and click **Disable**. The Disable Accounts page is displayed. • **Remove:** Select the account that you want to remove and click **Remove**. The Remove Roles catalog page is displayed.

Element	Description

View	Choose commands from the View menu to control how the columns are displayed:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Detach:** Click to open the table in a larger window.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Name, Application Instance, or Status. Ascending or Descending.
	    * Then By: Name, Application Instance, or Status. Ascending or Descending.
	    * Then By: Name, Application Instance, or Status. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to refine the search results by providing additional filters.

Request Accounts	Click **Request Account** to request for a new account. The Account Access Request page opens. Catalog tab is displayed.
Request Entitlements	Select an account for which you want to request an entitlement and click **Request Entitlement**. The Entitlement Access Request page opens.
Modify Grant Duration	The Modify Grant Duration dialog box is displayed with the following option: • **Justification:** Enter a justification for modifying the start date, or end date, or both. • **Enable Time Selection** • **Start Date:** Enter the start date when the account will be provisioned. This must be a future date. This field is not available for modification if the account is already assigned. • **End Date:** Enter the end date when the account will be revoked. • **OK:** Click **OK** to submit the selections. • **Cancel:** Click to cancel the changes made to the page.
Remove Accounts	Select the account that you want to remove and click **Remove**. The Remove Roles catalog page is displayed.

Element	Description
Enable	Select an account that you want to enable and click **Enable**. The Enable Accounts page is displayed.
Disable	Select an account that you want to disable and click **Disable**. The Disable Accounts page is displayed.
Modify Accounts	Select the account to be modified from the accounts table and click **Modify**. The Modify Account page opens.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
Reset Password	Select an account and click **Reset Password** to reset password for an account assigned to you.
Detach	Click to open the table in a larger window.
	Click to refine the search results by providing additional filters.

Related Topics

Managing Accounts in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Account Access Request

Account Access Request

Element	Description
Back	Click **Back** to navigate to the Add Access page.
Cancel	Click **Cancel** to cancel the changes made to the page.
Next	Click **Next** to navigate to the Checkout page.
Add Access	Click **Add Access** to open the Catalog page.
Checkout	Click **Checkout** to open the Checkout page.
	Click the cart icon to open the Cart window.

Catalog

Element	Description
Application	Select the Application Instance from the drop-down.
Search	Enter keyword to search for a particular Application Instance.

Element	Description
Search Button	Click **Search** to initiate the search and populate results in the Search Results table.

Categories

Element	Description
Sort By	Select the sort by option from the drop-down list: • Display Name • Type
Add Selected to Cart	Click **Add Selected to Cart** to add the selected Application Instance to cart. You can select multiple items in the Search Results table.
Select All	Click to select all the Application Instance in the Search Results table.
Application Instance	Click to select all the Application Instance in the Search Results table.
Add to Cart	Click **Add to Cart** beside the item you want to add to request cart.
In Cart	Shows that item is in the cart.
	Opens the Detailed Information page
Page	Page number of the Search Result table.
	Click to move to first page in the Search Result table.
	Click to move to previous page in the Search Result table.
	Click to move to previous page in the Search Result table.

Request Profiles

Element	Description
Search	Enter search criteria.
	Click to search.

Checkout - Cart Details

Element	Description
Submit	Click **Submit** to submit entitlement request for approval.
Save As	• **Profile:** Save as profile. • **Draft:** Save as draft.

Request Information

Element	Description
Justification	Enter the request information for account.

Cart Items

Element	Description
Display Name	Lists the items in the cart with the status. Following status can be seen: • : Ready to submit • : Not Ready to submit
	Click to display details of the entitlement.
	Click to remove item from cart.
Request Details	Displays the requested account name.
Update	Click to update the selected account.

Grant Duration

Element	Description
Grant will be effective immediately upon request completion	Select to specify if grant is effective immediately.
Enable Time Selection	Select to enable time zone selection. This displays the **Timezone** drop-down.
Timezone	Select the required time zone from the drop-down.
Start Date: 	Click to select the date from when this account is effective.
End Date: 	Click to select the date till when this account is effective.

Related Topics

Requesting for Accounts in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Modify Accounts

Modify Account Options

Element	Description
Target User	Displays the name of the target user. Click  to view the target user details.
Request Information	Enter request information for modification.
Cart Items	Displays the items in the cart and its status.
Save As	Click to save request as Draft.
Submit	Click Submit to submit modification request for approval.

Request Information

Element	Description
Justification	Enter the request information for account.

Cart Items

Element	Description
Display Name	Lists the items in the cart with the status. Following status can be seen: • : Ready to submit • : Not Ready to submit
	Click to display details of the entitlement.
	Click to remove item from cart.
Request Details	Displays the requested account name.
Update	Click to update the selected account.

Request Details - Edit Account details

Element	Description
Location	Click the  icon. It opens the Search and Select window.

Search and Select: Location

Element	Description
Meaning	Enter the meaning key word for searching.

Advanced	Advanced Search option are listed:
	• – Contains
	  – Starts with
	  – Ends with
	  – Equals
	• **Search:** Click **Search** to search for the group that you are from.
	• **Reset:** Click **Reset** to reset the search criteria.
	• **Add Fields:** Select other fields to add to the search criteria.
	• **Reorder:** Click Reorder to reorder the search fields. The Reorder Search Field window opens. You can reorder the search fields by selecting the search field and using the appropriate arrow icon to move up or down the list. Click **OK**.

Basic	When Advanced Search option is selected, Basic search button is enabled to allow you to go back to basic search. Click Basic to go to basic search option.
Search	Click **Search** to search for the group that you are from.
Reset	Click **Reset** to reset the search criteria.
OK	Click **OK** to select the group.
Cancel	Click to cancel the changes made to the page.

Related Topics

Modifying Accounts in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Enable Account

You can use the Enable Account screen to enable accounts:

Element	Description
Target User	Displays the name of the target user. Click to view the target user details.
Request Information	Enter request information for enabling account.
Cart Items	Displays the items in the cart and its status.
Save As	Click to save request as Draft.

Element	Description
Submit	Click Submit to submit enabling account request for approval.

Request Information

Element	Description
Effective Date	Click to enter the date from when the account will be enabled.
Justification	Enter the request information for account enabling.

Cart Items

Element	Description
Display Name	Lists the items in the cart with the status. Following status can be seen: • : Ready to submit • : Not Ready to submit
	Click to display details of the account.
	Click to remove item from cart.

Related Topics

Enabling an Account in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Disable Accounts

You can use the Disable Accounts screen to disable an account:

Element	Description
Target User	Displays the name of the target user. Click to view the target user details.
Request Information	Enter request information for disabling account.
Cart Items	Displays the items in the cart and its status.
Save As	Click to save request as Draft.
Submit	Click Submit to submit disabling account request for approval.

Request Information

Element	Description
Effective Date	Click to enter the date from when the account will be disabled.
Justification	Enter the request information for account disabling.

Cart Items

Element	Description
Display Name	Lists the items in the cart with the status. Following status can be seen: • : Ready to submit • : Not Ready to submit
	Click to display details of the account.
	Click to remove item from cart.

Related Topics

Disabling an Account in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Remove Accounts

You can use the Remove Accounts screen to remove accounts:

Element	Description
Target User	Displays the name of the target user. Click to view the target user details.
Request Information	Enter request information for modification.
Cart Items	Displays the items in the cart and its status.
Save As	Click to save request as Draft.
Submit	Click Submit to submit remove accounts request for approval.

Request Information

Element	Description
Justification	Enter the request information for account removal.

Cart Items

Element	Description
Display Name	Lists the items in the cart with the status. Following status can be seen: • : Ready to submit •  : Not Ready to submit
	Click to display details of the account.
	Click to remove item from cart.

Related Topics

Removing Accounts in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Reset Account Password

The Role Access Request page in Oracle Identity Self Service enables you to reset password for an account assigned to you.

Element	Description
Account Name	Displays the account name for which you want to reset the password.
Password	Enter the new password that satisfies all the password policy requirements.
Confirm	Re-enter the new password.
Justification	Enter the reason for resetting the password.
Submit	Click **Submit** to submit account password reset request.

Related Topics

Resetting Password for an Account in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Admin Roles

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>View</td><td>Choose commands from the View menu to control how the columns are displayed:

Columns: Click a column header name to quickly show or hide a single column.
Detach: Click to open the table in a larger window.
Sort

Ascending
Descending
Advanced

Sort By: Name, Application Instance, or Status. Ascending or Descending.
Then By: Name, Application Instance, or Status. Ascending or Descending.
Then By: Name, Application Instance, or Status. Ascending or Descending.

Reorder Columns: Click to open a dialog that lets you change the order of the table columns.
Query By Example: Click to refine the search results by providing additional filters.
</td></tr>
<tr><td>Refresh</td><td>Click Refresh to update the screen with any changes made on the (back-end) server.</td></tr>
<tr><td>Detach</td><td>Click to open the table in a larger window.</td></tr>
<tr><td></td><td>Click to refine the search results by providing additional filters.</td></tr>
</table>

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Detail Information</td><td>List of the Organization for which the selected Admin Right is applicable.

View: Choose commands from the View menu to control how the columns are displayed:

Columns: Click a column header name to quickly show or hide a single column.
Detach: Click to open the table in a larger window.
Sort:

Ascending
Descending
Advanced

Sort By: Organization Name, Parent Organization Name, Type, or Organization Status. Ascending or Descending.
Then By: Organization Name, Parent Organization Name, Type, or Organization Status. Ascending or Descending.
Then By: Organization Name, Parent Organization Name, Type, or Organization Status. Ascending or Descending.

Reorder Columns: Click to open a dialog that lets you change the order of the table columns.

Detach: Click to open the table in a larger window.
</td></tr>
</table>

Related Topics

Viewing Admin Roles in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Request Access for Self

Use the Add Access page to request access for self using the access catalog.

Request Access - Request for Self

Element	Description
Add Access	Select to open the Add Access page. The Add Access page enables you to search and select the items you want to request for.

Element	Description
Checkout	Select to checkout or submit the access request.
Back	Click to go back to the Add Access page.
Cancel	Click to cancel the changes made to the current page.
Next	Click to go to Checkout page.
	Click to add the selected Access to cart.

Add Access - Catalog

This tab enables you to search and add access (entities) to the request cart, and then create the request for access.

Element	Description
Type	Select any one of the following options: • **All:** To specify that all entities are being searched. • **Application:** To specify that only application instances are being searched. • **Entitlement:** To specify that entitlements are being searched. While searching for entitlements, you can specify the associated application instances. When you select the **Entitlement** option, the Application list is displayed. Select an application instance based on which you want to search the entitlement. The number of selected application instance is shown in the **Selected Apps** link. • **Role:** To specify that only roles are being searched.
Search text box	Enter a value of the selected attribute as the search criterion.
Search	Click to perform the search and display the results in a tabular format.
Sort By	Select any one of the following options: • Display Name • Type
Add Selected to Cart	Select multiple items from the catalog by following the standard multi-selection process for your system, and then click **Add Selected to Cart**.
Select All	Click this check box to display or hide all the items belonging to the categories.
Add to Cart	Click **Add to Cart** on the catalog item that you want to request.

Element	Description
	Click to view the details of the catalog item. The Detailed Information page is displayed that shows the attributes for the item.

Add Access - Request Profiles

This tab enables you to search and view request profiles, and add profiles to the cart.

Element	Description
Search text box	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular format.

Checkout

Element	Description
Submit	Click **Submit** to submit request for approval.
Save As	• **Profile:** Save as profile. • **Draft:** Save as draft.

Request Information

Element	Description
Justification	Enter the reason for requesting access.

Cart Items

Element	Description
Display Name	Lists the items in the cart with the status. Following status can be seen: • : Ready to submit • : Not Ready to submit
	Click to display details of the access.
	Click to remove item from cart.
Update	Click to update the selected access request details.

Related Topics

Requesting Access for Self in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Request Access for Others

Use the Request Access for Others page to request access for other users based on permissions you have.

Element	Description
Back	Click **Back** to navigate to the Select User page or Add Access page.
Cancel	Click **Cancel** to cancel the changes made to the page.
Next	Click **Next** to navigate to the Add Access page or the Checkout page.
Select Users	Click **Select Users** to open the Select User page.
Add Access	Click **Add Access** to open the Catalog page.
Checkout	Click **Checkout** to open the Checkout page.
	Click the cart icon to open the Cart window.

Select Users

Element	Description
Search User list	Select any one of the following search conditions: • **Display Name:** To search the user by display name. • **User Login:** To search the user by user login. • **First Name:** To search the user by first name. • **Last Name:** To search the user by last name. • **Identity Status:** To search the user by identity status, such as Active, Deleted, Disabled, or Disabled until Start Date. • **E-mail:** To search the user by e-mail address. • **Start Date:** To search the user by start date from when the user is active in the system. • **End Date:** To search the user by end date from when the user is deactivated in the system. • **Account Status:** To search the user by the account status which is Locked or Unlocked. • **Organization:** To search the user by his organization.
Search text	Enter a keyword for the search condition selected in the Search list.

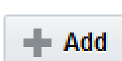
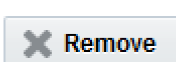
Element	Description
	Click the search icon to search for the user and display the results in a tabular format.
Advanced	Click the Advanced link to display the advanced search options.
Show direct reports	Select to show all direct reports.

Advanced Search

The Advanced search section lets you search for users based on detailed search criteria.

Element	Description
Match	Select any one of the following options: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Saved Search	Select a saved search from the drop-down.
Reset	Click to reset the values of the advanced search fields.
Save	Click to save the search conditions for later reuse.
Add Fields	Click to display more field names. Select or deselect field name to add to or remove from advanced search.
Reorder	Click to open the Reorder Search Fields dialog box. Use the up and down arrow keys to reorder the search fields, and click OK.
Basic	Click to go back to simple search options.
Search	Click to search the user based on the values entered in the advanced search fields.

Search Result

Element	Description
Users	Displays the list of users.
Selected Users	Displays the list of selected users.
	Click to opens the Detailed Information page.
	Click to add the user to the Selected user list. After the user is moved into the Selected user list this button is disabled.
	Click to remove the user from the Selected user list.

Add Access - Catalog

This tab enables you to search and add access (entities) to the request cart, and then create the request for access.

Element	Description
Type	Select any one of the following options: • **All:** To specify that all entities are being searched. • **Application:** To specify that only application instances are being searched. • **Entitlement:** To specify that entitlements are being searched. While searching for entitlements, you can specify the associated application instances. When you select the **Entitlement** option, the Application list is displayed. Select an application instance based on which you want to search the entitlement. The number of selected application instance is shown in the **Selected Apps** link. • **Role:** To specify that only roles are being searched.
Search text box	Enter a value of the selected attribute as the search criterion.
Search	Click to perform the search and display the results in a tabular format.
Sort By	Select any one of the following options: • Display Name • Type
Add Selected to Cart	Select multiple items from the catalog by following the standard multi-selection process for your system, and then click **Add Selected to Cart**.
Select All	Click this checkbox to display or hide all the items belonging to the categories.
Add to Cart	Click **Add to Cart** on the catalog item that you want to request.
	Click to view the details of the catalog item. The Detailed Information page is displayed that shows the attributes for the item.

Add Access - Request Profiles

Element	Description
Search text box	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular format.

Checkout

Element	Description
Submit	Click **Submit** to submit request for approval.
Save As	• **Profile:** Save as profile. • **Draft:** Save as draft.

Request Information

Element	Description
Justification	Enter the reason for requesting access.

Cart Items

Element	Description
Display Name	Lists the items in the cart with the status. Following status can be seen: • : Ready to submit • : Not Ready to submit
	Click to display details of the access.
	Click to remove item from cart.
Update	Click to update the selected access request details.

Related Topics

Requesting Access for Other Users in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Track My Request

Track Requests

Use the Track My Request page to Track your registration request.

Element	Description
Tracking ID	Enter the tracking Registration Request Number that has been assigned to your registration request.
Cancel	Click to cancel the changes made to the page.

Element	Description
Submit	Click to view the status of your request, Date of the request and Tracking ID. The status would be one of the following: • **Pending:** This state indicates that the request is submitted and the approval is pending. • **Rejected:** This state indicates that the request is rejected during approval. The description indicates the reason of rejection. • **Completed:** This state indicates that the request is completed. • **Failed:** This state indicates that the request is failed during submission.
Track Another Registration	Click to check the status of another registration request.
Back To Login	Click to go back to login page.

Related Topics

Tracking Registration Requests in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Provisioning

Search

Element	Description
Search Task list	Select any one of the following search conditions: • **Task Name:** To search the task by name. • **Beneficiary:** To search the task by beneficiary details. • **Task Status:** To search the task by status. • **Application Instance:** To search the task by Application Instance associated with the provisioning task.
Search text	Enter a keyword for the search condition selected in the Search list.
	Click the search icon to search for the task and display the results in a tabular format.
Advanced	Click the Advanced link to display the advanced search options.

Advanced Search

The Advanced search section lets you search for users based on detailed search criteria.

Element	Description
Match	Select any one of the following options: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Saved Search	Select a saved search from the drop-down.
Reset	Click to reset the values of the advanced search fields.
Save	Click to save the search conditions for later reuse.
Basic	Click to go back to simple search options.
Search	Click to search the user based on the values entered in the advanced search fields.

Search Result

Element	Description
Actions	• **Open:** Click to open the task. • **View Form:** Click to view the process form or account details attached with a task. • **Edit Form:** Click to edit the process form associated with a provisioning workflow to provide missing information. • **Manual Complete:** Click to complete a manual fulfillment task. • **Set Response:** Click to set a response for a task. • **Reassign:** Click to reassign a task to another user or role for taking appropriate action on the task. • **Retry:** Click to retry a task if an error is generated while setting the response in the first attempt. • **Refresh:** Click to refresh the page.

Element	Description

View	Choose commands from the View menu to control how the columns are displayed:
	• **Column:** Click a column header name to quickly show or hide a single column.
	• **Detach:** Click to open the table in a larger window.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Name, Application Instance, or Status. Ascending or Descending.
	    * Then By: Name, Application Instance, or Status. Ascending or Descending.
	    * Then By: Name, Application Instance, or Status. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to refine the search results by providing additional filters.

Open	Click **Open** to open the task. The Task details pop-up is displayed.
View Form	Click **View Form** to view the process form or account details attached with a task. The Task details pop-up is displayed.
Edit Form	Click **Edit Form** to edit the process form associated with a provisioning workflow to provide missing information. The Task details pop-up is displayed.
Manual Complete	Click **Manual Complete** to complete a manual fulfillment task.
Set Response	Click **Set Response** to set a response for a task. The Specify Task Responses pop-up is displayed. Select one of the multiple responses defined, and click **Set Response**.
Reassign	Click **Reassign** to reassign a task to another user or role for taking appropriate action on the task. The Reassign Open Tasks pop-up is displayed.
Retry	Click **Retry** to retry a task if an error is generated while setting the response in the first attempt.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
	Click to refine the search results by providing additional filters.

Element	Description
Detach	Click to open the table in a larger window.

Related Topics

Managing Provisioning Tasks in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Manual Fulfillment Task

Use the Manual Fulfillment page lists all tasks for provisioning of disconnected application instances.

Element	Description

Actions	• **Request Information:** Click to request for information about a task. The Request More Information dialog box is displayed. Select any one of the following options:
	  – **Participant:** To select a participant from the list. Select a return option to specify whether the task will return to the current assignee or will go to subsequent participants for further action.
	  – **Other users:** To select a user from whom information is requested. Click the lookup icon, and search and select a user.
	• **Reassign:** Click to reassign a task that is assigned to you. The Reassign Task dialog box is displayed. Select any one of the following options:
	  – **Reassign (transfer task to another user or group):** To reassign the task to another user, group, or application role. On selecting this option, you can search and select users, groups, or application roles for reassigning.
	  – **Delegate (allow specified user to act on my behalf):** To delegate the task to a user that you can search and select. The delegated user will take actions on the task on your behalf. The privileges of the delegatee are based on the delegator's privileges.
	• **Complete:** Click to complete a task.
	• **Reject:** Click to reject a task.

Search text box	Enter a search criterion that you want to search.
	Click to search and display the tasks that match the search criteria in a tabular format.

Element	Description
Complete	Click to complete a task.
Reject	Click to reject a task.
Reassign	Click to reassign a task that is assigned to you. The Reassign Task dialog box is displayed. Select any one of the following options: • **Reassign (transfer task to another user or group):** To reassign the task to another user, group, or application role. On selecting this option, you can search and select users, groups, or application roles for reassigning. • **Delegate (allow specified user to act on my behalf):** To delegate the task to a user that you can search and select. The delegated user will take actions on the task on your behalf. The privileges of the delegatee are based on the delegator's privileges.
Fulfill	Click to edit the details of a manual fulfillment task.
	Click to download the list of tasks in a spreadsheet for offline review.
	Click to display the Task Status list, which shows the number of pending violations for each status and total number of tasks. You can click the edit icon on the Task Status list to open the Chart Display States dialog box. Select or deselect the statuses that you want show or hide in the Task Status list, and click **OK**.
	Click to refresh the list of pending violations displayed on the Manual Fulfillment Task page.

Related Topics

Managing Manual Fulfillment Tasks in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Edit Fulfillment Task

Details

Use Edit Fulfillment Task to view and edit the details of a manual fulfillment task.

Element	Description
Assignees	Displays the name of the Assignee.
Creator	Displays the creator of the task.

Element	Description
Created	Displays the date when the task was created.
Updated	Displays the date when the task was updated.
Expiration Date	Displays the expiration date of the task.
Acquired By	Displays the acquired by task details.
Outcome	Displays the outcome of the task.
Priority	Displays the task priority.
State	Displays the task state.

Contents

Element	Description
Account ID	Displays the account id.
App Instance Name	Displays the application instance name.
Resource Object Name	Displays the Resource Object name.
IT Resource Name	Displays the name of the IT Resource to be provisioned.
Beneficiary Login	Displays the login of the beneficiary.
Beneficiary First Name	Displays the first name of the beneficiary.
Beneficiary Last Name	Displays the last name of the beneficiary.
Descriptive Field	Displays the descriptive field details.
Provisioning Operation	Displays the provisioning operation details.
Request Key	Displays the request key number.

Cart Details

Element	Description
Display Name	Displays the name of the resource to be provisioned.
	Click to see the detail of the resource.

Request Details

Element	Description
Grant Duration	Modify the values in the following fields: • **Start Date:** Click  to select the start date when the account or entitlement will be provisioned. • **End Date:** Click  to select the end date when the account or entitlement will be revoked.
Access Login	Enter the account login name.

Element	Description
Password	Enter the password. Click  to see the applicable password policy.
Access ID	Enter the account ID.

History

Element	Description
Options	• **Show All:** Click to show all actions in the task. • **Exclude System Approvals:** Click to exclude the approvals by Oracle Identity Manager. • **Combine Repeated Approvals:** Click to combine the approvals that have been done repeatedly. • **Include Future Approvals:** Click to show the approvals required in future dates.

Comments

Element	Description
	Click to add a comment to the task. The Create Comment dialog box is displayed. In the comment field, enter a comment for the task. Click **OK**.

Attachments

Element	Description
	Click to add an attachment. The Add Attachment dialog box is displayed. Select one of the following options as the attachment type: • **URL:** Select to specify the URL to an attachment. Enter the attachment name in the Name field, and enter the URL to the attachment in the URL • **Desktop File:** Select to upload a file from the desktop. Click Browse, and upload a file from the desktop. Click Browse, and select the attachment. Click **OK**.
	Click to delete the selected attachment.

Related Topics

Managing Manual Fulfillment Tasks in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Pending Violations

Use the Pending Violations page to access the pending violations that are assigned to you and take action on them.

Element	Description
Search text box	Enter a search criterion, for example a policy violation name that you want to search.
	Click to search and display the pending violations that match the search criteria in a tabular format.
Status list	Select to filter the pending violations list by one of the following statuses: • Any • Assigned • Completed • Suspended • Withdrawn • Expired • Errored • Altered • Information Requested
	Click to download the list of pending certifications in a spreadsheet for offline review.
	Click to display the Task Status list, which shows the number of pending violations for each status and total number of pending violations. You can click the edit icon on the Task Status list to open the Chart Display States dialog box. Select or deselect the statuses that you want show or hide in the Task Status list, and click **OK**.
	Click to refresh the list of pending violations displayed on the Pending Violations page.

Related Topics

Managing Pending Violations in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Violation Details

Use the Violation Details page to view the details of the pending violations that are assigned to you and take action on them.

Details Tab

Use the Details tab of the Violation details page to view policy violation details, and view the causes of violations and take action on them.

Section	Element	Description
	Complete	Click after taking action on all or some of the access details. Based on the actions taken and the conditions of the rules, the policy violation will either be closed (if there are no more violations) or re-opened (if some of the actions were left open or the risk accepted date has passed and the user still has the access) during subsequent identity audit scans.
Violation Details		Displays the details of the policy violation, such as the policy attributes, status, detection count, and the details of the user for which the violation is generated.
Access Details		Displays the cause of the violation, the rules within the policy that have been violated, the status and attributes of the violation, and comments, if any. In addition, the Attributes column displays details of the cause of the violation. You can place your mouse pointer on the information icon in the Rules Violated column to display a popup with details of the violated rule, such as rule name, description, and rule condition.
	Actions	Select any one of the following options from the Actions menu: • **Close as Fixed:** Select to indicate that the cause has been fixed manually, either because it has been taken care of outside the system or the remediator has manually taken action to ensure that this access no longer exists for the user. The Provide Comments dialog box is displayed. Enter a comment, and click **Submit**. • **Close as Risk Accepted:** Select to indicate that the access is required by the user for a particular time period, and the user can have the access until that date. The Provide Comments dialog box is displayed. In the Expiration Date field, specify a date after which the violation will be re-opened if it still exists. In the Comments field, enter a comment, and click **Submit**. • **Request for Remediation:** Select to indicate that you want to revoke the access of the user because it is not required by the user, in order to mitigate the violation. The Provide Comments dialog box is displayed. Enter a comment, and click **Submit**.
	Remediate	Click to indicate that you want to revoke the access of the user because it is not required by the user, in order to mitigate the violation. The Provide Comments dialog box is displayed. Enter a comment, and click **Submit**.

Section	Element	Description
	Close	Click and select any one of the following options: • **Close as Fixed:** Select to indicate that the cause has been fixed manually, either because it has been taken care of outside the system or the remediator has manually taken action to ensure that this access no longer exists for the user. The Provide Comments dialog box is displayed. Enter a comment, and click **Submit**. • **Close as Risk Accepted:** Select to indicate that the access is required by the user for a particular time period, and the user can have the access until that date. The Provide Comments dialog box is displayed. In the Expiration Date field, specify a date after which the violation will be re-opened if it still exists. In the Comments field, enter a comment, and click **Submit**.

Action History Tab

Use the Action History tab of the Violation details page to view all actions on the open policy till the current date.

Related Topics

Completing Policy Violations in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Pending Approvals

Use the Pending Approval page to access the pending approval tasks that are assigned to you and take action on them.

Element	Description
Search text box	Enter a search criterion, for example a task name that you want to search.
	Click to search and display the pending approval tasks that match the search criteria in a tabular format.

Element	Description
Actions	• **Approve:** Click to approve the selected task. The task details tab is displayed. Click **Approve**. • **Reassign:** Click to reassign the selected task. The Reassign Task dialog box is displayed. Select any one of the following options: – **Reassign (transfer task to another user or group):** To reassign the task to another user, group, or application role. On selecting this option, you can search and select users, groups, or application roles for reassigning. – **Delegate (allow specified user to act on my behalf):** To delegate the task to a user that you can search and select. The delegated user will take actions on the task on your behalf. The privileges of the delegatee are based on the delegator's privileges. Search for user or groups to which you want to reassign the task. Click **OK**. • **Escalate:** Click to escalate the issue. Search for user or groups to which you want to reassign the task. Click **OK**. • **Suspend:** Click to suspend the selected task. • **Withdraw:** Click to withdraw a task. • **Skip Current Assignment:** This option is available only to users with the System Administrators role. • **Claim:** Select a task that is not assigned to you. Click **Claim** to claim a task.
Status list	Select to filter the pending violations list by one of the following statuses: • Any • Assigned • Completed • Suspended • Withdrawn • Expired • Errored • Altered • Information Requested
	Click to download the list of pending certifications in a spreadsheet for offline review.

Element	Description
	Click to display the Task Status list, which shows the number of pending approval for each status and total number of pending approvals. You can click the edit icon on the Task Status list to open the Chart Display States dialog box. Select or deselect the statuses that you want show or hide in the Task Status list, and click **OK**.
	Click to refresh the list of pending violations displayed on the Pending Approval page.

Related Topics

Managing Pending Approvals in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Pending Certifications

Use the Pending Certifications page to view and make decisions on certification review tasks.

Element	Description
Search text box	Enter a search criterion, for example a certification task name that you want to search.
	Click to search and display the certification tasks that match the search criteria in a tabular format.
Status list	Select to filter the pending violations list by one of the following statuses: • Any • Assigned • Completed • Suspended • Withdrawn • Expired • Errored • Altered • Information Requested
	Click to display the Task Status list, which shows the number of certification tasks for each status and total number of certification tasks. You can click the edit icon on the Task Status list to open the Chart Display States dialog box. Select or deselect the statuses that you want show or hide in the Task Status list, and click **OK**.
	Click to refresh the list of pending violations displayed on the Pending Violations page.
Certification task name	Click the certification task name to open the details of the certification task in a separate page.

Related Topics

Managing Certification Review Tasks in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Certification Details

Use the Certification Details page to view the details of certification review tasks and take actions on them.

Element	Description
Actions	Depending on the open certification type, Select any one of the following options from the Actions menu: • **Claim:** Select to restore an entity to your verification queue for certification. This might happen automatically, depending on the values in certification configuration. • **Revoke:** Select if the entity is no longer appropriate. This action removes the entity from the certification process, and you will not approve or revoke assignments for this entity. To return the entity to your verification queue, select the entity, and select **Claim** from the Actions menu. • **Re-assign:** Select to remove the entity from the current certification and create a new one with the selected entity. This action removes the selected entity/entities from the current certification, creates a new certification with the selected entity/entities, and assigns the person you specify as the primary reviewer for that new certification. • **Abstain:** Select if the entity is not appropriate and you do not know who should be responsible for verifying the entity's assigned accounts and entitlements. • **Open:** Select to review the details of each entity and make certification decisions on the assignments or privileges of that entity. • **Delegate:** Select to allow another person to make decisions on the access privileges of each selected entity. This action will create a new delegated-review task that contains the selected entity/entities and will assign the task to the person you specify as delegate. Responsibility still remains with you, the primary reviewer. • **Un-delegate:** Select to remove each selected entity from the delegated-review task and returns decision-making rights to you, the primary reviewer. This action applies only to delegated entities. • **Complete:** Select to set any missing decisions on role-assignments, accounts, or entitlement-assignments to Certify. • **Reset Status:** Clears all decisions made on the user including decisions on the user's access. • **Edit Comment:** Select to edit the comment associated with the certification task. • **Sign-off:** Select to complete the certification by signing off. • **Certify:** Select to approve each selected assignment. • **Certify Conditionally:** Select to approve each selected assignment, but only temporarily. This action also requires you to specify an end date on which your approval expires. • **Reset:** Use this to clear any decision you have made on the selected assignment.

Element	Description
View	Select any one of the following from the View menu: • **Columns:** Select to display the options to show or hide columns of the certification details table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Certification Details page in a separate window. • **Reorder Column:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns. • **Query By Example:** Select to show or hide the Query By Example (QBE) fields in the Certification Details page.
Claim	Click to restore an entity to your verification queue for certification. This might happen automatically, depending on the values in certification configuration.
Revoke	Click if the entity is no longer appropriate. This action removes the entity from the certification process, and you will not approve or revoke assignments for this entity. To return the entity to your verification queue, select the entity, and select **Claim** from the Actions menu.
Complete	Click to set any missing decisions on role-assignments, accounts, or entitlement-assignments to Certify.
Open	Click to review the details of each entity and make certification decisions on the assignments or privileges of that entity.
	Click to show or hide the Query By Example (QBE) fields in the Certification Details page.
Detach	Click to detach the Certification Details page in a separate window.
Risk Levels	Displays the risk level, such as High, Medium, or Low, of the selected access privilege in the certification review task.
Certification attributes	Displays the certification name and certification creation date. Click the information icon adjacent to the certification name to display a Certification Details pop-up with detailed statistics of the current certification being reviewed. The details include information about Overview, Progress Details, and History.

Element	Description
Detailed Information	Depending on the open certification type, this section consists of the following tabs: • **User Information:** Displays user attributes that are included in the certification snapshot during certification generation. The user name is a hyperlink. Click the user name to display the user details in a new tab. • **Risk Summary:** Identifies why the Risk Summary is High, Medium, or Low based on various factors, such as Item Risk, Last Certification Decision, Provisioning Method, and Audit Violations. If there are no audit violations associated with the item, then the Audit Violations entry is not displayed. The Provisioning Method field is hyper-linked for an access request. Clicking this hyperlink opens the appropriate access policy or access request details in a new tab. • **Action History:** Displays the phase in which the reviewer made a given decision. Possible values include all the actions that are available in the Actions menu, as well as proxy, escalate, and expire. • **Catalog Information:** Displays all catalog attributes of the selected entity. The Certifier field is hyperlinked. Clicking this hyperlink opens the entity details in a new tab. • **Certification History:** Displays the various certification decisions made by reviewers in the past on the given line-item. • **Audit Violations:** Displays a list of audit violations associated with the selected item. Information includes the policy name, status, remediator, and severity for each audit violation. If there are no audit violations, then the list is empty. • **Members:** Lists the role membership of the open role. Select a row in the members table to display the Detailed Information section, which consists of the User Information, Risk Summary, Certification History, Action History, and Pending Violations tabs. • **Policies:** Lists the policies associated with the open role. Select a row in the policies table to display the Detailed Information section, which consists of the Policy Information, Certification History, and Action History tabs.
First	Click to display the details of the access rights for the first entity in the certification task.
Previous	Click to display the details of the access rights for the previous entity in the certification task.
Next	Click to display the details of the access rights for the next entity in the certification task.
Last	Click to display the details of the access rights for the last entity in the certification task.
Back to Summary	Click to go back to the entity certification detail page.

3 Manage

Identity administration tasks in Oracle Identity Self Service includes creating and managing users, roles and access policies, organizations, admin roles, password policies, and applications. These tasks are performed in the Manage section of the Oracle Identity Self Service.

The Manage section consists of the following pages:

Topics

Manage Home

Use the Manage Home page to manage users, roles and access policy, organization, Administration Roles and Applications.

Element	Description
Users	Click to view and manage users. You can create, modify, delete, enable, and disable users using this page.
Roles and Access Policies	Click to view and manage roles and access policies.
Organizations	Click to view and manage organizations. You can create, view, modify, and delete organizations.
Administration Roles	Click to view and manage admin roles.
Policies	Click to view and manage password policy.
Applications	Click to view and manage applications and templates.

Related Topics

Manage Home page in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Users

Search

The Search section lets you search for Users.

Element	Description
Search User list	Select any one of the following search conditions: • **User Login:** To search the user by user login. • **First Name:** To search the user by first name. • **Last Name:** To search the user by last name. • **Id:** To search the user by ID. • **E-mail:** To search the user by email id of the user. • **Start Date:** To search the user by the start date. • **End Date:** To search the user by the end date. • **Display Name:** To search the user by the display name. • **Account Status:** To search the user by the account status. • **Organization:** To search the user by the organization.
Search text	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular format.
Advanced	Click the Advanced link to display the advanced search options.

Advanced Search

The Advanced search section lets you search for users based on detailed search criteria.

Element	Description
Match	Select any one of the following options: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Saved Search	Select a saved search from the drop-down.
Reset	Click to reset the values of the advanced search fields.
Save	Click to save the search conditions for later reuse.
Add Fields	Click to display more field names. Select or deselect field name to add to or remove from advanced search.

Element	Description
Reorder	Click to open the Reorder Search Fields dialog box. Use the up and down arrow keys to reorder the search fields, and click OK.
Basic	Click to go back to simple search options.
Search	Click to search the user based on the values entered in the advanced search fields.

Search Result

The search result section in the Users page lets you open, create, and manage users.

Element	Description
Actions	Choose options from the menu to perform the following operations: • **Create:** Click to open the Create User page for creating a new User. • **Edit:** Click to open the Edit Users page that lets you modify the selected User. • **Enable:** Click to enable a disabled user. • **Disable:** Click to disable a user. • **Delete:** Click to delete a user. • **Lock Account:** Click to lock the account of a user. • **Unlock Account:** Click to unlock the account of a user. • **Reset Password:** Click to reset the password for a user. Reset Password window is displayed. – **Manually change the Password:** Select to change password manually. Enter **New Password** and **Confirm New Password**. – **Auto-generate the Password (Randomly generated)** – **Reset Password:** Click to reset the password. – **Cancel:** Click to cancel the changes made. • **Refresh:** Click to refresh the page.

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>View</td><td>Choose commands from the View menu to control how the columns are displayed:

Columns: Click a column header name to quickly show or hide a single column.
Detach: Click to open the table in a larger window.
Sort

Ascending
Descending
Advanced

Sort By: User Login, Display Name, First Name, Last Name, Organization, Telephone Number, E-mail, Identity Status, or Account Status. Ascending or Descending.
Then By: User Login, Display Name, First Name, Last Name, Organization, Telephone Number, E-mail, Identity Status, or Account Status. Ascending or Descending.
Then By: User Login, Display Name, First Name, Last Name, Organization, Telephone Number, E-mail, Identity Status, or Account Status. Ascending or Descending.

Reorder Columns: Click to open a dialog that lets you change the order of the table columns.
Query By Example: Click to refine the search results by providing additional filters.
</td></tr>
<tr><td>Create</td><td>Click Create to open the Create User page for creating a new User.</td></tr>
<tr><td>Edit</td><td>Click Edit to open the Edit Users page that lets you modify the selected User.</td></tr>
<tr><td>Enable</td><td>Click Enable to enable a disabled user.</td></tr>
<tr><td>Disable</td><td>Click Disable to disable a user.</td></tr>
<tr><td>Delete</td><td>Click Delete to delete a user.</td></tr>
<tr><td>Locked Account</td><td>Click Locked Account to lock the account of a user.</td></tr>
<tr><td>Unlock Account</td><td>Click Unlock Account to unlock the account of a user.</td></tr>
<tr><td>Reset Password</td><td>Click Reset Password to reset the password for a user.</td></tr>
<tr><td>Refresh</td><td>Click Refresh to refresh the user updates.</td></tr>
<tr><td></td><td>Click to refine the search results by providing additional filters.</td></tr>
</table>

Element	Description
Detach	Click to open the table in a larger window.

Related Topics

Managing Users in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create User

You can create a new user in Oracle Identity Manager by using the Create User page.

Element	Description
Submit	Click **Submit** to create the user.
Save As	Click **Save As** to save request as Draft.
Cancel	Click to cancel the changes made to the page.

Request Information

Elements	Description
Effective Date	Click  to select the date from when this user is effective.
Justification	Enter the justification for creating the user.

Basic Information

Elements	Description
First Name	Enter the first name of the user.
Middle Name	Enter the middle name of the user.
Last Name	Enter the last name of the user.
E-mail	Enter the E-mail address of the user.
Manager	Click  to select the reporting manager of the user.
Organization	Click  to select the organization to which the user belongs. This is also known as the home organization.
User Type	Select the type of employee, such as consultant, contractor, contingent worker, employee, full-time employee, intern, non-worker, other, part-time employee, or temporary.
Display Name	Enter the display name.

Account Settings

Elements	Description
User Login	Enter the user name to be specified for logging in to the Administration Console.
Password	Enter the password to be specified for logging in to the Administration console. Click to view the Applicable Password Policy Rules.
Confirm Password	Re-enter the password to be specified for logging in to the Administration console.

Account Effective Dates

Elements	Description
Start Date	Press down arrow to access Calendar or click to enter date when the user will be activated in the system.
End Date	Press down arrow to access Calendar or click to enter date when the user will be deactivated in the system.

Provisioning Dates

Elements	Description
Provisioning Date	Press down arrow to access Calendar or click to enter date when the user will be provisioned in the system.
Deprovisioning Date	Press down arrow to access Calendar or click to enter date when the user will be deprovisioned from the system.

Contact Information

Elements	Description
Telephone Number	The telephone number of the user.
Home Phone	The telephone number of the user's residence.
Fax	The fax number of the user.
Mobile	The mobile number of the user.
Pager	The pager number of the user.
Home Postal Address	The postal address of the user's residence.
Postal Address	The postal address of the user.
Postal Code	The postal code number of the user's address.

Elements	Description
PO Box	The post box number of the user's address.
State	The state name of the user.
Street	The street name where the user resides.
Country	The country where user resides.

Preferences

Elements	Description
Locale	The locale code of the user.
Timezone	The timezone of the user.

Other Attributes

Elements	Description
Common Name	Enter the common name of the user.
Department Number	Enter the department number of the user.
Employee Number	Enter the employee number of the user.
Generation Qualifier	Enter the whether the user qualifies the generation.
Hire Date	Press down arrow to access Calendar or click to select the hiring date of the user.
Locality Name	Enter the name of the locality where user resides.
Initials	Enter the initials of the user.
Title	Enter the title for the user.

Related Topics

Creating a User in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

User Details

The User Details page allows you to view detailed user profile information.

Element	Description
Attributes tab	Displays the attribute profile that includes details about basic user information, account effective dates, and provisioning dates.
Roles tab	Displays a list of roles to which the user belongs.
Entitlements tab	Displays a list of entitlements for the user.

Element	Description
Accounts tab	Displays a list of accounts for the user.
Direct Reports tab	Displays a read-only table of users for whom the user is set as the manager.
Organizations tab	Displays a list of organizations to which the user is assigned.
Admin Roles tab	Displays a list of admin roles assigned to the user.
Modify	Click to modify user.
Enable	Click to enable a disabled user.
Disable	Click to disable a user.
Delete	Click to delete a user.
Lock Account	Click to lock the account of a user.
Unlock Account	Click to unlock the account of a user.
Reset Password	Click to reset the password for a user.

Related Topics

Viewing User Details in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Modify User

You can perform administrative user modification tasks from the user details. The modification is broken up across the different tabs in the page that displays user details, which means that modifications done in each tab are independent of each other and must be saved individually.

Element	Description
Submit	Click **Submit** to modify the user details.
Save As	Click **Save As** to save request as Draft.
Cancel	Click to cancel the changes made to the page.

Request Information

Elements	Description
Effective Date	Click to select the date from when this user is effective.
Justification	Enter the justification for creating the user.

Basic Information

Elements	Description
First Name	Enter the first name of the user.

Elements	Description
Middle Name	Enter the middle name of the user.
Last Name	Enter the last name of the user.
E-mail	Enter the E-mail address of the user.
Manager	Click to select the reporting manager of the user.
Organization	Click to select the organization to which the user belongs. This is also known as the home organization.
User Type	Select the type of employee, such as consultant, contractor, contingent worker, employee, full-time employee, intern, non-worker, other, part-time employee, or temporary.
Display Name	Enter the display name.

Account Settings

Elements	Description
User Login	Enter the user name to be specified for logging in to the Administration Console.

Account Effective Dates

Elements	Description
Start Date	Press down arrow to access Calendar or click to enter date when the user will be activated in the system.
End Date	Press down arrow to access Calendar or click to enter date when the user will be deactivated in the system.

Provisioning Dates

Elements	Description
Provisioning Date	Press down arrow to access Calendar or click to enter date when the user will be provisioned in the system.
Deprovisioning Date	Press down arrow to access Calendar or click to enter date when the user will be deprovisioned from the system.

Contact Information

Elements	Description
Telephone Number	The telephone number of the user.
Home Phone	The telephone number of the user's residence.
Fax	The fax number of the user.
Mobile	The mobile number of the user.
Pager	The pager number of the user.
Home Postal Address	The postal address of the user's residence.
Postal Address	The postal address of the user.
Postal Code	The postal code number of the user's address.
PO Box	The post box number of the user's address.
State	The state name of the user.
Street	The street name where the user resides.
Country	The country where user resides.

Preferences

Elements	Description
Locale	The locale code of the user.
Timezone	The timezone of the user.

Other Attributes

Elements	Description
Common Name	Enter the common name of the user.
Department Number	Enter the department number of the user.
Employee Number	Enter the employee number of the user.
Generation Qualifier	Enter the whether the user qualifies the generation.
Hire Date	Press down arrow to access Calendar or click to select the hiring date of the user.
Locality Name	Enter the name of the locality where user resides.
Initials	Enter the initials of the user.
Title	Enter the title for the user.

Related Topics

Modifying Users in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Enable User

Using the Enable User page you can enable a disabled user.

Element	Description
Target User	Displays the name of the target user. Click to view the target user details.
Request Information	Enter request information for enabling user.
Save As	Click to save request as Draft.
Submit	Click Submit to submit enabling user request for approval.

Request Information

Element	Description
Effective Date	Click to enter the date from when the user will be enabled.
Justification	Enter the request information for user enabling.

Related Topics

Enabling a User in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Disable User

Using the Disable User page you can disable a user.

Element	Description
Target User	Displays the name of the target user. Click to view the target user details.
Request Information	Enter request information for disabling user.
Save As	Click to save request as Draft.
Submit	Click Submit to submit disabling user request for approval.

Request Information

Element	Description
Effective Date	Click to enter the date from when the user will be disabled.

Element	Description
Justification	Enter the request information for user disabling.

Related Topics

Disabling a User in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Delete User

Using the Delete User page you can delete a user.

Element	Description
Target User	Displays the name of the target user. Click to view the target user details.
Request Information	Enter request information for deleting user.
Save As	Click to save request as Draft.
Submit	Click Submit to delete user request for approval.

Request Information

Element	Description
Effective Date	Click to enter the date from when the user will be deleted.
Justification	Enter the request information for user deletion.

Related Topics

Deleting a User in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Organization

Search

The Search section lets you search for Organizations.

Element	Description
Search User list	Select any one of the following search conditions: • **Organization Name:** To search the Organization by name. • **Type:** To search the Organization by type of organization. • **Organization Status:** To search the Organization by the status. • **Parent Organization Name:** To search the Organization by the parent organization. • **Certifier User Login:** To search the Organization by certifier user login.
Search text	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular format.
Advanced	Click the Advanced link to display the advanced search options.

Advanced Search

The Advanced search section lets you search for organizations based on detailed search criteria.

Element	Description
Match	Select any one of the following options: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Saved Search	Select a saved search from the drop-down.
Reset	Click to reset the values of the advanced search fields.
Save	Click to save the search conditions for later reuse.
Add Fields	Click to display more field names. Select or deselect field name to add to or remove from advanced search.
Reorder	Click to open the Reorder Search Fields dialog box. Use the up and down arrow keys to reorder the search fields, and click OK.
Basic	Click to go back to simple search options.
Search	Click to search the user based on the values entered in the advanced search fields.

Search Result

The search result section in the Organization page lets you open, create, and manage organizations.

Element	Description
Actions	• **Create:** Click to open the Create Organization page for creating a new Organization. • **Edit:** Click to open the Organization page for modifying the Organization. • **Enable:** Click to enable an organization with disabled state. • **Disable:** Click to disable an organization with enabled state. • **Delete:** Click to delete an organization.

View	Choose commands from the View menu to control how the columns are displayed:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Detach:** Click to open the table in a larger window.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * **Sort By:** Organization Name, Parent Organization Name, Type, or Organization Status. Ascending or Descending.
	    * **Then By:** Organization Name, Parent Organization Name, Type, or Organization Status. Ascending or Descending.
	    * **Then By:** Organization Name, Parent Organization Name, Type, or Organization Status. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to refine the search results by providing additional filters.

Create	Click to open the Create Organization page for creating a new Organization.
Edit	Click to open the Organization page for modifying the Organization.
Enable	Click to enable an organization with disabled state.
Disable	Click to disable an organization with enable state.
Delete	Click to delete an organization.

Element	Description
	Click to refine the search results by providing additional filters.
Detach	Click to open the table in a larger window.

Related Topics

Managing Organizations in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Organization

Attributes

Elements	Description
Organization Name	Enter the name of the organization.
Type	Select the type of organization from the drop-down: • Branch • Company • Department
Parent Organization Name	Select the parent organization. Click to select the desired organization.
Certifier User Login	Select the certifier user. Click to select user.
Enforce password policy on reassignment	Select the Enforce password policy on reassignment from the drop-down. • Inherit from Parent Org • Yes • No
Password Policy Name	Specify a password policy name that you want to associate with the organization. Click to search Password Policy.
Save	Click **Save** to create the organization.
Cancel	Click to close the page without saving the changes.

Related Topics

Creating an Organization in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

View Organization

Elements	Description
Disable	Click to disable an organization.
Create Sub-Org	Click to create a sub-organization.
Create User	Click to create a user with this organization.
Delete	Click to delete the organization.

Attributes

Elements	Description
Organization Name	Enter the name of the organization.
Type	Displays the type of organization.
Parent Organization Name	Select the parent organization. Click  to select the desired organization.
Certifier User Login	Select the certifier user. Click  to select user.
Enforce password policy on reassignment	Select the Enforce password policy on reassignment from the drop-down. • Inherit from Parent Org • Yes • No
Password Policy Name	Specify a password policy name that you want to associate with the organization. Click  to search Password Policy.
Save	Click **Save** to create the organization.
Revert	Click to close the page without saving the changes.

Children

Elements	Description
Action	• **Create Sub-Org:** Click to create a child organization or sub-organization of the open organization. • **Delete:** Click to delete a child organization. • **Enable:** Click to enable a child organization. • **Disable:** Click to disable a child organization. • **Open:** Click to open a child organization. • **Refresh:** Click to refresh the page.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns. • **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.
Create Sub-Org	Click to create a child organization or sub-organization of the open organization.
Delete	Click to delete a child organization.
Enable	Click to enable a child organization.
Disable	Click to disable a child organization.
Open	Click to view a child organization.
Refresh	Click Refresh to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.

Member

Elements	Description
User Membership Rule	Displays the user membership rule for this organization.
Member	Displays the Members who belong to this organization.
Apply	Click Apply to submit the user membership rule changes.
Apply and Evaluate	Click Apply to submit the user membership rule changes after evaluating the rule.
Revert	Click to close the page without saving the changes.

Elements	Description
Add Rule icon	Click to add a new rule. Expression builder window opens.
Edit Rule icon	Click to edit rule. Expression builder window opens.
Delete Rule icon	Click to delete rule.

Add Rule - Expression Builder (Build Expression)

Elements	Description
Attributes	Select the attribute you want to include in the expression and Click Add
Attributes - Add	Select the expression from the drop-down: • = • != • Contains • Starts With • Ends With • IN
Save	Click to save the rule.
Cancel	Click to cancel the changes made.

Add Rule - Expression Builder (Preview Results)

Elements	Description
Attributes	Select the attribute you want to include in the expression and Click Add

Elements	Description

View	Choose commands from the View menu to control how the columns are displayed:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Detach:** Click to open the table in a larger window.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: User Login, Display Name, First Name, Last Name, or E-mail. Ascending or Descending.
	    * Then By: User Login, Display Name, First Name, Last Name, or E-mail. Ascending or Descending.
	    * Then By: User Login, Display Name, First Name, Last Name, or E-mail. Ascending or Descending.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

	Click to show or hide the filter row that is displayed above the column headers to query on the columns.
Detach	Click to open the table in a larger window.

Available Roles

Elements	Description

View	Choose commands from the View menu to control how the columns are displayed:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Detach:** Click to open the table in a larger window.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Role Name. Ascending or Descending.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
	Click to refine the search results by providing additional filters.
Detach	Click to open the table in a larger window.

Admin Roles

Elements	Description
Action	Assign

View	Choose commands from the View menu to control how the columns are displayed:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Detach:** Click to open the table in a larger window.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Admin Role Name. Ascending or Descending.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Elements	Description
Assign	Click to grant an admin role to a user. Add user window opens where you can search and select a user.
	Click to refine the search results by providing additional filters.
Detach	Click to open the table in a larger window.

Admin Roles - User Members

Elements	Description
Action	**Revoke:** Click to revoke an admin role from a user.

View	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Detach:** Click to open the table in a larger window.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Admin Role Name. Ascending or Descending.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Revoke	Click to revoke an admin role from a user.
Refresh	Click Refresh to update the screen with any changes made on the (back-end) server.
	Click to refine the search results by providing additional filters.
Detach	Click to open the table in a larger window.
Apply	Click to save the changes.
Revert	Click to close the page without saving the changes.

Available Accounts

Elements	Description

View	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Detach:** Click to open the table in a larger window.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Account Name, Description, Account Type, or Organization Name. Ascending or Descending.
	    * Then By: Account Name, Description, Account Type, or Organization Name. Ascending or Descending.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Refresh	Click Refresh to update the screen with any changes made on the (back-end) server.
	Click to refine the search results by providing additional filters.
Detach	Click to open the table in a larger window.

Provisioned Accounts

Elements	Description
Action	• **Provision:** Click to provision a resource to an organization. • **Revoke:** Click to revoke a resource from an organization. • **Open:** Click to view the details of a provisioned resource. • **Enable:** Click to enable a resource provisioned to the organization. • **Disable:** Click to disable a provisioned resource. • **Resource History:** Click to view the action history of a provisioned resource. • **Refresh:** Click to update the screen with any changes made on the (back-end) server.

Elements	Description

View	Choose commands from the View menu to control how the columns are displayed:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Detach:** Click to open the table in a larger window.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Name, Application Instance, or Status. Ascending or Descending.
	    * Then By: Name, Application Instance, or Status. Ascending or Descending.
	    * Then By: Name, Application Instance, or Status. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to refine the search results by providing additional filters.

Provision	Click to provision a resource to an organization.
Revoke	Click to revoke a resource from an organization.
Open	Click to view the details of a provisioned resource.
Enable	Click to enable a resource provisioned to the organization.
Disable	Click to disable a provisioned resource.
Resource History	Click to view the action history of a provisioned resource.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
	Click to refine the search results by providing additional filters.
Detach	Click to open the table in a larger window.

Available Entitlements

Elements	Description

View	Choose commands from the View menu to control how the columns are displayed:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Detach:** Click to open the table in a larger window.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Name, Application Instance, or Status. Ascending or Descending.
	    * Then By: Name, Application Instance, or Status. Ascending or Descending.
	    * Then By: Name, Application Instance, or Status. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to refine the search results by providing additional filters.

Refresh	Click Refresh to update the screen with any changes made on the (back-end) server.
	Click to refine the search results by providing additional filters.
Detach	Click to open the table in a larger window.

Related Topics

Viewing and Modifying Organizations in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Admin Roles

Search

The Search section lets you search for Admin Roles.

Element	Description
Search Admin Roles list	Select any one of the following search conditions: • **Display Name:** To search the Admin Role by display name. • **Description:** To search the Admin Role by description. • **Name:** To search the Admin Role by name.
Search text	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular format.
Advanced	Click the Advanced link to display the advanced search options.

Advanced Search

The Advanced search section lets you search for admin roles based on detailed search criteria.

Element	Description
Match	Select any one of the following options: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Saved Search	Select a saved search from the drop-down.
Reset	Click to reset the values of the advanced search fields.
Save	Click to save the search conditions for later reuse.
Add Fields	Click to display more field names. Select or deselect field name to add to or remove from advanced search.
Reorder	Click to open the Reorder Search Fields dialog box. Use the up and down arrow keys to reorder the search fields, and click OK.
Basic	Click to go back to simple search options.
Search	Click to search the user based on the values entered in the advanced search fields.

Search Result

The search result section in the Admin Roles page lets you open, create, and manage admin roles.

Element	Description
Actions	• **Create:** Click to open the Create Admin Roles page for creating a new admin role. • **Edit:** Click to open the Admin role for modification. • **Delete:** Click to delete an Admin Role.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Sort** – Ascending – Descending – Advanced * Sort By: Display Name, Description, or Name. Ascending or Descending. * Then By: Display Name, Description, or Name. Ascending or Descending. * Then By: Display Name, Description, or Name. Ascending or Descending. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns. • **Query By Example:** Click to refine the search results by providing additional filters.
Create	Click to open the Create Admin Roles page for creating a new admin role.
Edit	Click to open the Admin role for modification.
Delete	Click to delete an Admin Role.
	Click to refine the search results by providing additional filters.
Detach	Click to open the table in a larger window.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.

Related Topics

Managing Administration Roles in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Admin Role

Element	Description
Back	Click **Back** to navigate to the previous page.
Cancel	Click **Cancel** to cancel the changes made to this page.
Next	Click **Next** to navigate to the next page.

General Role Information

Element	Description
Name	Enter the name of the Admin Role.
Display Name	Enter display name of the Admin Role.
Description	Enter Description of the Admin Role.

Assign Capabilities

Assign the functional tasks that can be performed by the members of this Admin Role

Element	Description
Add Capabilities Button	Click Add Capability to open Add Capabilities window.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns. • **Sort** – Ascending – Descending – Advanced * Sort By: User Login, Display Name, First Name, Last Name, or E-mail. Ascending or Descending. * Then By: User Login, Display Name, First Name, Last Name, or E-mail. Ascending or Descending. * Then By: User Login, Display Name, First Name, Last Name, or E-mail. Ascending or Descending.

Element	Description
Add	Click to add capabilities. Add Capability window is displayed.
Remove	Click to remove the selected capability.
Refresh	Click Refresh to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.

Add Capabilities window

Elements	Description
Search capability list	Select any one of the following search conditions: • **Display Name:** To search the capability by display name. • **Description:** To search the capability by description. • **Entity Type:** To search the capability by entity type. Select entity type from the drop-down.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click the search icon to search for capability.

Results	Displays the search result.
	Select the following options from the View menu:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Display Name or Description. Ascending or Descending.
	    * Then By: Display Name or Description. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Add Selected	Select the required capability and click **Add Selected** to select any capabilities from Result Capabilities list.
Add All	Click to add all the capabilities listed in the Result Capability list.

Elements	Description

Selected Capabilities	Displays the list of selected capabilities.
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Display Name or Description. Ascending or Descending.
	    * Then By: Display Name or Description. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.

Remove Selected	Select the required capability and click **Remove Selected** to deselect any capabilities from Selected Capabilities list.
Remove All	Click to remove all the capabilities listed in the Selected Capability list.
Select	Click to add the capability. Capabilities are listed in the Assign Capabilities Panel.
Cancel	Click to close the window without adding capabilities.

Member

Define members for this role using a membership rule or by assigning users directly

Element	Description
User Membership Rule	Displays the membership rules.
Member assignment	Displays the user assigned.

User Membership Rule

Element	Description
Create Membership Rule	Click to add membership rule. Expression builder window opens.
Evaluate Rule Later	Select if the rule has to be evaluated later.
Edit Rule	Click to edit the membership rule.
Delete Rule	Click to delete the membership rule.

Member Assignment

Element	Description
Assign Users	Click to assign user. Assign user window opens.
Direct Members	Displays the members that are statically assigned to the open role.
Rule Based Members	Displayed the members that are assigned to the open role via membership rules.
All Members	Displays all the members, direct and rule based which are assigned to the open role.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
Assign	Click to assign static users. The Assign Users search dialog box is displayed.
Revoke	Click to revoke a user.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.

Scope of Control

Specify the organizations which can be managed using this admin role

Element	Description
Add Capabilities Button	Click Add Organization to open Add Organization window.

Element	Description

View	Choose commands from the View menu to control how the columns are displayed:
	• **Columns:** Select to display the options to show or hide columns, such as Organization Name, Type, or Hierarchy Aware, of the organization table. Select Show All to display all the columns. Select Manage Columns to open the Manage Columns dialog box where you can select the columns to be shown or hidden.
	• **Detach:** Click to open the table in a larger window.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Organization Name, Type, or Hierarchy Aware. Ascending or Descending.
	    * Then By: Organization Name, Type, or Hierarchy Aware. Ascending or Descending.

Add	Click to add organization. Add organization window is displayed.
Remove	Click to remove the selected organization.
Refresh	Click Refresh to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.

Add Organizations Window

Element	Description
Search list	Select an attribute based on which you can search the Organization. The attributes are Organization Name, Type, Organization Status, Parent Organization Name, or Certifier User Name.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular format.

Element	Description

Results	Displays the search result.
	Select the following options from the View menu:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Organization Name, Type, or Organization Status. Ascending or Descending.
	    * Then By: Organization Name, Type, or Organization Status. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Add Selected	Select the required organization and click **Add Selected** to select any organization from Result list.
Add All	Click to add all the organizations listed in the Result list.

Selected Capabilities	Displays the list of selected organizations.
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Organization Name, Type, or Organization Status. Ascending or Descending.
	    * Then By: Organization Name, Type, or Organization Status. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.

Remove Selected	Select the required organization and click **Remove Selected** to deselect any organization from Selected organization list.
Remove All	Click to remove all the organization listed in the Selected organization list.
Select	Click to add the organization. Organizations are listed in the Assign organization Panel.
Cancel	Click to close the window without adding organizations.

Publish Role to Organizations

You can publish the admin role to one or more organizations.

Element	Description
Add Capabilities Button	Click Add Organization to open Add Organization window.

View	Choose commands from the View menu to control how the columns are displayed:
	• **Columns:** Select to display the options to show or hide columns, such as Organization Name, Type, or Hierarchy Aware, of the organization table. Select Show All to display all the columns. Select Manage Columns to open the Manage Columns dialog box where you can select the columns to be shown or hidden.
	• **Detach:** Click to open the table in a larger window.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Organization Name, Type, or Hierarchy Aware. Ascending or Descending.
	    * Then By: Organization Name, Type, or Hierarchy Aware. Ascending or Descending.

Add	Click to add organization. Add organization window is displayed.
Remove	Click to remove the selected organization.
Refresh	Click Refresh to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.

Add Organizations Window

Element	Description
Search list	Select an attribute based on which you can search the Organization. The attributes are Organization Name, Type, Organization Status, Parent Organization Name, or Certifier User Name.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular.

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Results</td><td>Displays the search result.
Select the following options from the View menu:
Columns: Click a column header name to quickly show or hide a single column.
Sort
Ascending
Descending
Advanced
Sort By: Organization Name, Type, or Organization Status. Ascending or Descending.
Then By: Organization Name, Type, or Organization Status. Ascending or Descending.
Reorder Columns: Click to open a dialog that lets you change the order of the table columns.
Query By Example: Click to show or hide the filter row that is displayed above the column headers to query on the columns.</td></tr>
<tr><td>Add Selected</td><td>Select the required organization and click Add Selected to select any organization from Result list.</td></tr>
<tr><td>Add All</td><td>Click to add all the organizations listed in the Result list.</td></tr>
<tr><td>Selected Capabilities</td><td>Displays the list of selected organizations.
Columns: Click a column header name to quickly show or hide a single column.
Sort
Ascending
Descending
Advanced
Sort By: Organization Name, Type, or Organization Status. Ascending or Descending.
Then By: Organization Name, Type, or Organization Status. Ascending or Descending.
Reorder Columns: Click to open a dialog that lets you change the order of the table columns.</td></tr>
<tr><td>Remove Selected</td><td>Select the required organization and click Remove Selected to deselect any organization from Selected organization list.</td></tr>
<tr><td>Remove All</td><td>Click to remove all the organization listed in the Selected organization list.</td></tr>
<tr><td>Select</td><td>Click to add the organization. Organizations are listed in the Assign organization Panel.</td></tr>
<tr><td>Cancel</td><td>Click to close the window without adding organizations.</td></tr>
</table>

Summary

Summary tab lists all the information entered in the previous steps.

Element	Description
Attributes	Displays the options selected in Basic Information screen.
Capabilities	Displays the options selected in Capabilities screen.
Members	Displays the options selected in Members screen.
Scope of Control	Displays the options selected in Scope of Control screen.
Organization	Displays the options selected in Organization screen.

Related Topics

Creating an Admin Role in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Role Viewer

You can open the details of an admin role and edit the basic information, the capabilities, the members, the scope of control, and, the organizations.

Element	Description
Apply	Click **Apply** to modify the Admin Role details.
Revert	Click to close the page without saving the changes.

Basic Information

Element	Description
Name	Displays the name of the Admin Role.
Display Name	Displays the display name of the Admin Role.
Description	Displays the description for the Admin Role.

Capabilities

The Capabilities tab displays the Capabilities the Admin role is assigned. You can add new capabilities or remove capabilities from the existing list.

Element	Description

View	Choose commands from the View menu to control how the columns are displayed:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Detach:** Click to open the table in a larger window.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: User Login, Display Name, First Name, Last Name, or E-mail. Ascending or Descending.
	    * Then By: User Login, Display Name, First Name, Last Name, or E-mail. Ascending or Descending.
	    * Then By: User Login, Display Name, First Name, Last Name, or E-mail. Ascending or Descending.

Add	Click to add capabilities. Add Capability window is displayed.
Remove	Click to remove the selected capability.
Refresh	Click Refresh to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.

Add Capabilities window

Elements	Description
Search capability list	Select any one of the following search conditions: • **Display Name:** To search the capability by display name. • **Description:** To search the capability by description. • **Entity Type:** To search the capability by entity type. Select entity type from the drop-down.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click the search icon to search for capability.

Elements	Description
Results	Displays the search result. Select the following options from the View menu: • **Columns:** Click a column header name to quickly show or hide a single column. • **Sort** – Ascending – Descending – Advanced * Sort By: Display Name or Description. Ascending or Descending. * Then By: Display Name or Description. Ascending or Descending. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns. • **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.
Add Selected	Select the required capability and click **Add Selected** to add it to Selected Capabilities list.
Add All	Click to add all the capabilities listed in the Result Capability list.
Selected Capabilities	Displays the list of selected capabilities. • **Columns:** Click a column header name to quickly show or hide a single column. • **Sort** – Ascending – Descending – Advanced * Sort By: Display Name or Description. Ascending or Descending. * Then By: Display Name or Description. Ascending or Descending. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
Remove Selected	Select the required capability and click **Remove Selected** to deselect any capabilities from Selected Capabilities list.
Remove All	Click to remove all the capabilities listed in the Selected Capability list.
Select	Click to add the capability. Capabilities are listed in the Assign Capabilities Panel.
Cancel	Click to close the window without adding capabilities.

Member

The Members tab displays the User Membership Rules and Member assignment for the Admin role.

Element	Description
User Membership Rule	Displays the membership rules.
Member assignment	Displays the user assigned.

User Membership Rule

Element	Description
Create Membership Rule	Click to add membership rule. Expression builder window opens.
Evaluate Rule Later	Select if the rule has to be evaluated later.
Edit Rule	Click to edit the membership rule.
Delete Rule	Click to delete the membership rule.

Member Assignment

Element	Description
Assign Users	Click to assign user. Assign user window opens.
Direct Members	Displays the members that are statically assigned to the open role.
Rule Based Members	Displayed the members that are assigned to the open role via membership rules.
All Members	Displays all the members, direct and rule based which are assigned to the open role.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
Assign	Click to assign static users. The Assign Users search dialog box is displayed.
Revoke	Click to revoke a user.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.

Scope of Control

The Scope of Control tab allows you to specify the organizations that this admin role can manage.

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Add organization button</td><td>Click Add Organization to open Add Organization window.</td></tr>
<tr><td>View</td><td>Choose commands from the View menu to control how the columns are displayed:

Columns: Select to display the options to show or hide columns, such as Organization Name, Type, or Hierarchy Aware, of the organization table. Select Show All to display all the columns. Select Manage Columns to open the Manage Columns dialog box where you can select the columns to be shown or hidden.
Detach: Click to open the table in a larger window.
Reorder Columns: Click to open a dialog that lets you change the order of the table columns.
Sort

Ascending
Descending
Advanced

Sort By: Organization Name, Type, or Hierarchy Aware. Ascending or Descending.
Then By: Organization Name, Type, or Hierarchy Aware. Ascending or Descending.

</td></tr>
<tr><td>Add</td><td>Click to add organization. Add organization window is displayed.</td></tr>
<tr><td>Remove</td><td>Click to remove the selected organization.</td></tr>
<tr><td>Refresh</td><td>Click Refresh to update the screen with any changes made on the (back-end) server.</td></tr>
<tr><td>Detach</td><td>Click to open the table in a larger window.</td></tr>
</table>

Add Organizations

Element	Description
Search list	Select an attribute based on which you can search the Organization. The attributes are Organization Name, Type, Organization Status, Parent Organization Name, or Certifier User Name.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular format.

Element	Description

Results	Displays the search result.
	Select the following options from the View menu:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Organization Name, Type, or Organization Status. Ascending or Descending.
	    * Then By: Organization Name, Type, or Organization Status. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.
	•

Add Selected	Select the required organization and click **Add Selected** to add it to Selected Organization list.
Add All	Click to add all the organizations listed in the Result list.

Selected Organization	Displays the list of selected organizations.
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Organization Name, Type, or Organization Status. Ascending or Descending.
	    * Then By: Organization Name, Type, or Organization Status. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.

Remove Selected	Select the required organization and click **Remove Selected** to deselect any organization from Selected organization list.
Remove All	Click to remove all the organization listed in the Selected organization list.
Select	Click to add the organization. Organizations are listed in the Assign organization Panel.

Element	Description
Cancel	Click to close the window without adding organizations.

Publish Role to Organizations

You can publish the admin role to one or more organizations.

Element	Description
Add Capabilities Button	Click Add Organization to open Add Organization window.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Select to display the options to show or hide columns, such as Organization Name, Type, or Hierarchy Aware, of the organization table. Select Show All to display all the columns. Select Manage Columns to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Click to open the table in a larger window. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns. • **Sort** – Ascending – Descending – Advanced * Sort By: Organization Name, Type, or Hierarchy Aware. Ascending or Descending. * Then By: Organization Name, Type, or Hierarchy Aware. Ascending or Descending.
Add	Click to add organization. Add organization window is displayed.
Remove	Click to remove the selected organization.
Refresh	Click Refresh to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.

Add Organizations Window

Element	Description
Search list	Select an attribute based on which you can search the Organization. The attributes are Organization Name, Type, Organization Status, Parent Organization Name, or Certifier User Name.

<table>
<thead>
<tr><th>Element</th><th>Description</th></tr>
</thead>
<tbody>
<tr><td>Search text box</td><td>Enter a value of the selected attribute as the search criterion.</td></tr>
<tr><td></td><td>Click to perform the search and display the results in a tabular format.</td></tr>
<tr><td>Results</td><td>Displays the search result.
Select the following options from the View menu:

Columns: Click a column header name to quickly show or hide a single column.
Sort

Ascending
Descending
Advanced

Sort By: Organization Name, Type, or Organization Status. Ascending or Descending.
Then By: Organization Name, Type, or Organization Status. Ascending or Descending.

Reorder Columns: Click to open a dialog that lets you change the order of the table columns.
Query By Example: Click to show or hide the filter row that is displayed above the column headers to query on the columns.
</td></tr>
<tr><td>Add Selected</td><td>Select the required organization and click Add Selected to add to the Selected Organization list.</td></tr>
<tr><td>Add All</td><td>Click to add all the organizations listed in the Result list.</td></tr>
<tr><td>Selected Capabilities</td><td>Displays the list of selected organizations.

Columns: Click a column header name to quickly show or hide a single column.
Sort

Ascending
Descending
Advanced

Sort By: Organization Name, Type, or Organization Status. Ascending or Descending.
Then By: Organization Name, Type, or Organization Status. Ascending or Descending.

Reorder Columns: Click to open a dialog that lets you change the order of the table columns.
</td></tr>
<tr><td>Remove Selected</td><td>Select the required organization and click Remove Selected to deselect any organization from Selected organization list.</td></tr>
<tr><td>Remove All</td><td>Click to remove all the organization listed in the Selected organization list.</td></tr>
</tbody>
</table>

Element	Description
Select	Click to add the organization. Organizations are listed in the Assign organization Panel.
Cancel	Click to close the window without adding organizations.

Related Topics

Viewing and Modifying Admin Role in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Password Policies

Use password policies page you can view and manage password policy.

Element	Description
Search policies text box	Enter the policy name of the password policy you are searching.
	Click the search icon to search for password policy.
Advanced	Click the Advanced link to display the advanced search options.

Advanced Search

The Advanced search section lets you search for Password Policy based on detailed search criteria.

Element	Description
Policy Name	Enter the password policy name you want to search.
Search	Click to search Password Policy based on the values entered in the advanced search fields.
Reset	Click to reset the values of the advanced search fields.
Save	Click to save the search conditions for later reuse.
Add Fields	Click to display more field names. Select or deselect field name to add to or remove from advanced search.
Reorder	Click to open the Reorder Search Fields dialog box. Use the up and down arrow keys to reorder the search fields, and click **OK**.
Basic	Click to go back to simple search options.
Saved Search drop-down	Select a saved search from the drop-down.

Password Policies

Element	Description
Action	The Actions menu provides the following options: • **Create:** Select to open the Create Password Policy page for creating a new password policy. • **Delete:** Select to delete a selected password policy. • **Open:** Select to open the details of a selected password policy. • **Refresh:** Select to refresh the list of password policy in the Password Policies page.
View	Select one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Policy Name, Description, Minimum Length, Minimum Password Age(Days), Warn After (Days), Disallow Past Passwords, or Expires After (Days) of the password policies tables. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Policies page in a separate window. • **Sort:** Select to sort the policies in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Create	Click **Create** to create a password policy.
Open	Click **Open** to open the details of a selected password policy.
Delete	Click **Delete** to delete a selected password policy.
Refresh	Click **Refresh** to refresh the list of password policy in the Password Policies page.
Detach	Click **Detach** to detach the Policies page in a separate window.

Related Topics

Managing Password Policies in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Password Policies

Use this page to create a password policy.

Element	Description
Policy Name	Enter the name of the password policy.
Description	Enter the description of the password policy.
Apply	Click **Apply** to create the password policy.
Cancel	Click **Cancel** to cancel the changes made to the page.

Policy Rules

Element	Description
Minimum Length	Enter the minimum number of characters that a password must contain for the password to be valid.
Minimum Password Age (Days)	Enter the minimum duration in days for which users can use a password.
Warn After (Days)	Enter the number of days that must pass before a user is notified that the user's password will expire on a designated date.
Disallow Past Passwords	Enter the frequency at which old passwords can be reused. This policy ensures that users do not change back and forth among a set of common passwords.
Expires After (Days)	Enter the maximum duration in days for which users can use a password.

Complex Password

Element	Description
Complex Password	Select **Complex Password** to evaluate password against the complex password criteria. If you select the **Complex Password** option, then you cannot use the Custom Policy option setup.

Custom Policy

Element	Description
Custom Policy	Select **Custom Policy** to set a custom password policy by using the fields listed in Custom Policy section.
Maximum Length	Enter the maximum number of characters that a password can contain.

Element	Description
Maximum Repeated Characters	Enter the maximum number of times a character can be repeated in a password.
Minimum Numeric Characters	Enter the minimum number of digits that a password must contain.
Minimum Alphanumeric Characters	Enter the minimum number of letters or digits that a password must contain.
Minimum Unique Characters	Enter the minimum number of non-repeating characters that a password must contain.
Minimum Alphabet Characters	Enter the minimum number of letters that a password must contain.
Minimum Uppercase Characters	Enter the minimum number of uppercase letters that a password must contain.
Minimum Lowercase Characters	Enter the minimum number of lowercase letters that a password must contain.
Special Characters: Min	Enter the minimum number of special characters that a password must contain.
Special Characters: Max	Enter the maximum number of special characters that a password can contain.
Unicode Characters:Min	Enter the minimum number of Unicode characters that a password must contain.
Unicode Characters:Max	Enter the maximum number of Unicode characters that a password can contain.
Password File	Enter the path and name of a file that contains predefined terms, which are not allowed as passwords. The file must be stored on the same host on which Oracle Identity Manager is deployed.
File Delimiter	Enter the delimiter character used to separate terms in the password.
Characters Required	Enter the characters that a password must contain. For example, if you enter x in the Characters Required field, then a password is accepted only if it contains the character x. The character you specify in the Characters Required field must be mentioned in the Characters Allowed field. If you enter a character in the Characters Required field that is not mentioned in the Characters Allowed field, then an error is displayed stating that the required characters must be in the list of allowed characters, and required characters must not be in the list of not allowed characters. In addition, if you specify more than one character, then do not provide delimiters. Commas and white spaces are also considered as characters in this field. For example, if you specify characters such as a,x,c, and then the password is not accepted unless it contains comma.

Element	Description
Characters Allowed	Enter the characters that a password can contain. **Note:** If any character is used in the password and that character is not in the Characters Allowed field, then the password will be rejected. For example, if the Characters Allowed field has "abc" and the password is "dad", then the password is rejected because "d" is not in the Characters Allowed field. If you specify the same character in the Characters Allowed and Characters Not Allowed fields, then an error message is returned when you create the password policy.
Characters Not Allowed	Enter the characters that a password must not contain.
Substrings Not Allowed	Enter the series of consecutive alphanumeric characters that a password must not contain. For example, if you enter oracle in the Substrings Not Allowed field, then a password is not accepted if it contains the letters o, r, a, c, l, and e, in successive order.
Maximum Incorrect Login attempts counter	Enter the maximum number of incorrect login attempt is allowed for a user.
Permanent Lockout	Select if the user has to be permanently lockout for exceeding maximum incorrect login attempt.

Element	Description
Lock Duration	Enter the duration (in minutes) for which the user is locked for exceeding maximum incorrect login attempt.
Start with Alphabet	Select if the password has to begin with a letter.
Disallow First Name	Select if the user's first name will not be accepted as the whole password or as part of the password.
Disallow User ID	Select if the user ID will not be accepted as the whole password or as part of the password.
Disallow Last Name	Select if the user's last name will not be accepted as the whole password or as part of the password.

Challenge Options

Element	Description
Enable Challenge Policy Support	Select to enable configuration of challenge questions through password policy.
Allowed Challenges	Select the set of challenge question that has to be shown to the user. The options are: User Defined, Admin Defined, or User or Admin Defined.
Total Questions To Be Collected	Enter the total number of challenge questions a user needs to provide at login.
Minimum Correct Answers When Challenged	Enter the minimum number of correct answers the user needs to provide when he is asked the challenge questions.
Allow Duplicate Responses	Select if duplicate responses are allowed or not.
Minimum Answer Length	Enter the minimum length of answer for the challenge questions.
Lock User After Attempts	Enter the number of attempts before the user is locked if he provided wrong answers to the challenge questions.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. Select **Show All** to display all the columns.
Add	When **Allowed Challenges** is set to Admin Defined, User, or Admin Defined, challenge questions have to be added. Click **Add** to add challenge questions.
Questions	Enter challenge questions.
Delete	Click **Delete** to delete the selected challenge question.

Related Topics

Creating a Password Policy in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Edit Password Policy

Use this page to modify a password policy.

Element	Description
Policy Name	Displays the name of the password policy.
Description	Enter the description of the password policy.
Apply	Click **Apply** to modify the password policy.
Revert	Click **Revert** to close without saving the changes made to this page.

Policy Rules

Element	Description
Minimum Length	Enter the minimum number of characters that a password must contain for the password to be valid.
Minimum Password Age (Days)	Enter the minimum duration in days for which users can use a password.
Warn After (Days)	Enter the number of days that must pass before a user is notified that the user's password will expire on a designated date.
Disallow Past Passwords	Enter the frequency at which old passwords can be reused. This policy ensures that users do not change back and forth among a set of common passwords.
Expires After (Days)	Enter the maximum duration in days for which users can use a password.

Complex Password

Element	Description
Complex Password	Select **Complex Password** to evaluate password against the complex password criteria. If you select the **Complex Password** option, then you cannot use the Custom Policy option setup.

Custom Policy

Element	Description
Custom Policy	Select **Custom Policy** to set a custom password policy by using the fields listed in Custom Policy section.
Maximum Length	Enter the maximum number of characters that a password can contain.
Maximum Repeated Characters	Enter the maximum number of times a character can be repeated in a password.
Minimum Numeric Characters	Enter the minimum number of digits that a password must contain.
Minimum Alphanumeric Characters	Enter the minimum number of letters or digits that a password must contain.
Minimum Unique Characters	Enter the minimum number of non-repeating characters that a password must contain.
Minimum Alphabet Characters	Enter the minimum number of letters that a password must contain.
Minimum Uppercase Characters	Enter the minimum number of uppercase letters that a password must contain.
Minimum Lowercase Characters	Enter the minimum number of lowercase letters that a password must contain.
Special Characters: Min	Enter the minimum number of special characters that a password must contain.
Special Characters: Max	Enter the maximum number of special characters that a password can contain.
Unicode Characters:Min	Enter the minimum number of Unicode characters that a password must contain.
Unicode Characters:Max	Enter the maximum number of Unicode characters that a password can contain.
Password File	Enter the path and name of a file that contains predefined terms, which are not allowed as passwords. The file must be stored on the same host on which Oracle Identity Manager is deployed.
File Delimiter	Enter the delimiter character used to separate terms in the password.

Element	Description
Characters Required	Enter the characters that a password must contain. For example, if you enter x in the Characters Required field, then a password is accepted only if it contains the character x. The character you specify in the Characters Required field must be mentioned in the Characters Allowed field. If you enter a character in the Characters Required field that is not mentioned in the Characters Allowed field, then an error is displayed stating that the required characters must be in the list of allowed characters, and required characters must not be in the list of not allowed characters. In addition, if you specify more than one character, then do not provide delimiters. Commas and white spaces are also considered as characters in this field. For example, if you specify characters such as a,x,c, and then the password is not accepted unless it contains comma.

Element	Description
Characters Allowed	Enter the characters that a password can contain. **Note:** If any character is used in the password and that character is not in the Characters Allowed field, then the password will be rejected. For example, if the Characters Allowed field has "abc" and the password is "dad", then the password is rejected because "d" is not in the Characters Allowed field. If you specify the same character in the Characters Allowed and Characters Not Allowed fields, then an error message is returned when you modify the password policy.
Characters Not Allowed	Enter the characters that a password must not contain.
Substrings Not Allowed	Enter the series of consecutive alphanumeric characters that a password must not contain. For example, if you enter oracle in the Substrings Not Allowed field, then a password is not accepted if it contains the letters o, r, a, c, l, and e, in successive order.
Maximum Incorrect Login attempts counter	Enter the maximum number of incorrect login attempt is allowed for a user.
Permanent Lockout	Select if the user has to be permanently lockout for exceeding maximum incorrect login attempt.

Element	Description
Lock Duration	Enter the duration (in minutes) for which the user is locked for exceeding maximum incorrect login attempt.
Start with Alphabet	Select if the password has to begin with a letter.
Disallow First Name	Select if the user's first name will be accepted as the whole password or as part of the password.
Disallow User ID	Select if the user ID will be accepted as the whole password or as part of the password.
Disallow Last Name	Select if the user's last name will be accepted as the whole password or as part of the password.

Challenge Options

Element	Description
Enable Challenge Policy Support	Select to enable configuration of challenge questions through password policy.
Allowed Challenges	Select the set of challenge question that has to be shown to the user. The options are: User Defined, Admin Defined, or User or Admin Defined.
Total Questions To Be Collected	Enter the total number of challenge questions a user needs to provide at login.
Minimum Correct Answers When Challenged	Enter the minimum number of correct answers the user needs to provide when he is asked the challenge questions.
Allow Duplicate Responses	Select if duplicate responses are allowed or not.
Minimum Answer Length	Enter the minimum length of answer for the challenge questions.
Lock User After Attempts	Enter the number of attempts before the user is locked if he provided wrong answers to the challenge questions.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. Select **Show All** to display all the columns.
Add	When **Allowed Challenges** is set to Admin Defined, User, or Admin Defined, challenge questions have to be added. Click **Add** to add challenge questions.
Questions	Enter challenge questions.
Delete	Click **Delete** to delete the selected challenge question.

Roles

You can use this page to view and manage roles.

Element	Description
Search list	Select any one of the following search conditions: • **Display Name:** To search the role by display name. • **Name:** To search the role by role name. • **Role Namespace:** To search the role by role namespace.
Search text box	Enter a keyword for the search condition selected in the Search list.
	Click the search icon to search for the roles and display the results in a tabular format.
Advanced	Click the Advanced link to display the advanced search options.

Advanced Search

The Advanced search section lets you search for roles based on detailed search criteria.

Element	Description
Match	Select any one of the following options: • **Any:** To specify that the search result must match any one of the specified search criteria. • **All:** To specify that the search result must match all the specified search criteria.
Basic	Click to go back to simple search options.
Saved Search	Select a saved search from the drop-down.
Search	Click to search the role based on the values entered in the advanced search fields.
Reset	Click to reset the values of the advanced search fields.
Save	Click to save the search conditions for later reuse.
Add Fields	Click to display more field names. Select or deselect field name to add to or remove from advanced search.
Reorder	Click to open the Reorder Search Fields dialog box. Use the up and down arrow keys to reorder the search fields, and click **OK**.

Search Result

The search result section in the Roles page lets you open, create, and manage roles.

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Actions</td><td>Choose options from the menu to perform the following operations:

Create: Click to create a new role.
Open: Click to open the Role page.
Delete: Click to delete an existing role.
Refresh: Click to update the screen with any changes made on the (back-end) server.
</td></tr>
<tr><td>View</td><td>Choose commands from the View menu to control how the columns are displayed:

Columns: Click a column header name to quickly show or hide a single column.
Detach: Click to open the table in a larger window.
Sort

Ascending
Descending
Advanced

Sort By: Display Name, Name, Role Namespace, Role E-mail, or Role Description. Ascending or Descending.
Then By: Display Name, Name, Role Namespace, Role E-mail, or Role Description. Ascending or Descending.

Reorder Columns: Click to open a dialog that lets you change the order of the table columns.
Query by Example: Click to refine the search results by providing additional filters.
</td></tr>
<tr><td>Create</td><td>Click Create to open the Create Role page for creating a new Role.</td></tr>
<tr><td>Open</td><td>Click Open to open the Edit Role page that lets you modify the selected Role.</td></tr>
<tr><td>Delete</td><td>Click Delete to delete a role.</td></tr>
<tr><td>Refresh</td><td>Click Refresh to refresh the role updates.</td></tr>
<tr><td></td><td>Click to refine the search results by providing additional filters.</td></tr>
<tr><td>Detach</td><td>Click to open the table in a larger window.</td></tr>
</table>

Related Topics

Managing Roles in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Role

Use the Create Role page to create a new role.

Element	Description
Back	Click **Back** to navigate to the previous page.
Cancel	Click **Cancel** to cancel the changes made to this page.
Next	Click **Next** to navigate to the next page.

Attributes

Use the Attributes page to provide basic role information.

Elements	Description
Name	Enter name of the role.
Display Name	Enter display name of the role.
Role E-mail	Enter email id of the role.
Role Description	Enter description of the role.
Owned By	Enter the role owner details. Click to search and select owner. **Note:** If a value of the Owned By field is not specified, then it takes the logged-in user as the role owner.

Catalog Attributes

Element	Description
Catalog	Enter the Catalog name.
Audit Objective	Enter the Audit Objective.
Risk Level	Select Risk level as, High Risk, Medium Risk, or Low Risk.
User Defined Tags	Enter user defined tags.
Approver User	Click to select the approver user.
Approver Role	Click to select the approver role.
Certifier User	Click to select the certifier user.

Element	Description
Certifier Role	Click  to select the certifier role.
Fulfillment User	Click  to select the fulfillment user.
Fulfillment Role	Click  to select the fulfillment role.
Certifiable	Select to enable the role to appear in the certification.
Auditable	Select to enable the role to appear in audit.
Requestable	Select to mark the role as Requestable entity.

Hierarchy - Define Role Hierarchies

Use this tab to choose parent roles for the role you are creating.

Element	Description
Actions	Select the following options from the Actions menu: • **Add:** Click to add parent role. • **Remove:** Click to remove the selected role. • **Undo:** Click to undo previous action. • **Refresh:** Click to update the screen with any changes made on the (back-end) server.
View	Choose commands from the View menu to control how the columns are displayed: • **Column:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Reorder Column:** Click to open a dialog that lets you change the order of the table columns. • **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.
Add	Click **Add** to add a parent role.
Remove	Click Remove to remove a parent role that is selected.
Undo	Click to undo previous action.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.
	Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Add Parent Roles

Element	Description
Search Role list	Select an attribute based on which you can search the Role. The attributes are Display Name, Name, Role E-mail, Role Description, or Role Namespace.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular format.

Results	Displays the search result.
	Select the following options from the View menu:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Role Description, Display Name, Role E-mail, Role Key, Name, or Role Category. Ascending or Descending.
	    * Then By: Role Description, Display Name, Role E-mail, Role Key, Name, or Role Category. Ascending or Descending.
	    * Then By: Role Description, Display Name, Role E-mail, Role Key, Name, or Role Category. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Add Selected	Select the required role and click **Add Selected** to move it to Selected Roles table.
All Add	Click to add all the roles listed in the Result list.
Remove Selected	Select the required roles and click **Remove Selected** to deselect them from Selected Roles list.
Remove All	Click to remove all the roles listed in the Selected Roles list.

Element	Description
Selected Roles	Displays the list of selected roles. • **Columns:** Click a column header name to quickly show or hide a single column. • **Sort** – Ascending – Descending – Advanced * Sort By: Role Description, Display Name, Role E-mail, Role Key, Name, or Role Category. Ascending or Descending. * Then By: Role Description, Display Name, Role E-mail, Role Key, Name, or Role Category. Ascending or Descending. * Then By: Role Description, Display Name, Role E-mail, Role Key, Name, or Role Category. Ascending or Descending. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
Select	Click to add the Role. Roles are listed in the Inherited from Panel.
Cancel	Click to close the window without adding roles.

Access Policy

Use this tab to add access policies to define access rights of this role.

Element	Description
Action	Select the following options from the Actions menu: • **Add:** Click to add new access policy. • **Remove:** Click to remove the selected access policy. • **Undo:** Click to undo previous action. • **Refresh:** Click to update the screen with any changes made on the (back-end) server.

Element	Description

View	Displays the list of selected roles.
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Policy Description or Policy Name. Ascending or Descending.
	    * Then By: Policy Description or Policy Name. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to refine the search results by providing additional filters.

Add	Click **Add** to add a new access policy.
Remove	Click **Remove** to remove the selected access policy.
Undo	Click **Undo** to undo previous action.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
	Click to refine the search results by providing additional filters.
Detach	Click to open the table in a larger window.

Add Access Policies

Elements	Description
Search policy list	Select any one of the following search conditions: • **Policy Name:** To search the policy by name. • **Policy Description:** To search the policy by description.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click the search icon to search for policy.

Elements	Description

Results	Displays the search result.
	Select the following options from the View menu:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * **Sort By:** Policy Name or Description. Ascending or Descending.
	    * **Then By:** Policy Name or Description. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Add Selected	Select the required capability and click **Add Selected** to add any access policy selected from the Result table.
Add All	Click to add all the access policies listed in the Results table.

Selected Policies	Displays the search result.
	Select the following options from the View menu:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * **Sort By:** Policy Name or Description. Ascending or Descending.
	    * **Then By:** Policy Name or Description. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Remove Selected	Select the required policy and click **Remove Selected** to deselect any policy from Selected Policies table.
Remove All	Click to remove all the policies listed in the Selected Policies table.

Elements	Description
Select	Click to add the Access Policy. Access Policies are listed in the Assign Access Policy Panel.
Cancel	Click to close the window without adding.

Use this tab to define members to this role manually or via a membership rule.

Members - Add Role Membership

Element	Description
Create Membership Rule	Click to add membership rules. The User membership rules for role tab are displayed.
Add Members	Click to add members. The Add Member tab is displayed.

Members - User Membership Rule

Element	Description
Evaluate membership rule now	Select if the rule has to be evaluated now.
Edit Rule	Click to edit the membership rule.
Delete Rule	Click to delete the membership rule.

Add Member

Elements	Description
Search User list	Select any one of the following search conditions from the list.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click the search icon to search for user.

Elements	Description

Results	Displays the search result.
	Select the following options from the View menu:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * **Sort By:** Ascending or Descending.
	    * **Then By:** Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Add Selected	Select the required user and click **Add Selected** to add any user selected from the Result table.
Add All	Click to add all the users listed in the Results table.

Selected Users	Displays the search result.
	Select the following options from the View menu:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * **Sort By:** Ascending or Descending.
	    * **Then By:** Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Remove Selected	Select the required user and click **Remove Selected** to deselect any user from Selected User table.
Remove All	Click to remove all the users listed in the Selected User table.
Select	Click to add the User. Added Members are listed in the Assign User Panel.
Cancel	Click to close the window without adding.

Member assignment

Element	Description
All Members	Displays all the members, direct and rule based which are assigned to the open role.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
Assign	Click to assign static users. The Assign Users search dialog box is displayed.
Revoke	Click to revoke a user.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.

Organization

Use this tab to select the organizations to which this role will be published.

Element	Description
Action	Select the following options from the Actions menu: • **Add:** Click to add new organization. • **Remove:** Click to remove the selected organization. • **Undo:** Click to undo previous action. • **Refresh:** Click to update the screen with any changes made on the (back-end) server.

Element	Description

View	Displays the list of selected roles.
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Organization Name, Type, Hierarchy Aware, or Pending Action. Ascending or Descending.
	    * Then By: Organization Name, Type, Hierarchy Aware, or Pending Action. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to refine the search results by providing additional filters.

Add	Click **Add** to add a new organization.
Remove	Click **Remove** to remove the selected organization.
Undo	Click **Undo** to undo previous action.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
	Click to refine the search results by providing additional filters.
Detach	Click to open the table in a larger window.

Add Organizations

Element	Description
Search list	Select an attribute based on which you can search the Organization. The attributes are Organization Name, Type, Organization Status, Parent Organization Name, or Certifier User Name.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular format.

Element	Description

Results	Displays the search result.
	Select the following options from the View menu:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Organization Name, Type, or Organization Status. Ascending or Descending.
	    * Then By: Organization Name, Type, or Organization Status. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Add Selected	Select the required organization and click **Add Selected** to add it to Selected Organization list.
Add All	Click to add all the organizations listed in the Result list.

Selected Organization	Displays the list of selected organizations.
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Organization Name, Type, or Organization Status. Ascending or Descending.
	    * Then By: Organization Name, Type, or Organization Status. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.

Remove Selected	Select the required organization and click **Remove Selected** to deselect any organization from Selected organization list.
Remove All	Click to remove all the organization listed in the Selected organization list.
Select	Click to add the organization. Organizations are listed in the Assign organization Panel.
Cancel	Click to close the window without adding organizations.

Summary

Use the Summary page to review the details of the roles.

Element	Description
Attributes	Displays the details provided in Attribute tab.
Catalog Attributes	Displays the details provided in Catalog Attributes tab.
Hierarchy	Displays the details provided in Hierarchy tab.
Access Policy	Displays the details provided in Access Policy tab.
Members	Displays the details provided in Members tab.
Organizations	Displays the details provided in Organization tab.

Related Topics

Managing Roles in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Roles Details

Use the Open Roles page to display the details of the selected role and modify role information.

Element	Description
Attribute	Displays the role attributes.
Hierarchy	Displays the role hierarchy information.
Access Policy	Displays the access policies assigned for the role.
Members	Displays the members assigned to the open role.
Organizations	Displays the organizations to which the open role has been published.
History	Displays all data about the open role that have been modified within a specified date range.

> **Note:**
>
> The History tab is displayed only when Identity Audit is enabled in the Oracle Identity Manager deployment.

Element	Description
View Analytics	Click **View Analytics** to compare the role with other existing roles to justify or reject the creation of the requested role. **Note:** When Identity Audit is enabled and if you modify any attribute or any other data, then the **View Analytics** button is available. This is for the request approver to compare the role before approval.
Apply	Click **Apply** to submit the changes.
Revert	Click to cancel the changes made to the page.

Attribute

Use the Attributes page to provide basic role information.

Element	Description
Name	Enter the name of the role.
Role Namespace	Displays the role namespace details.
Display Name	Enter the display name of the role.
Role E-mail	Enter the email id of the role.
Role Description	Enter the role description.
Owned By	Click to select the user who will be the Role Owner.

Catalog Attributes

Element	Description
Catalog	Enter the Catalog name.
Audit Objective	Enter the Audit Objective.
Risk Level	Select Risk level as, High Risk, Medium Risk, or Low Risk.
User Defined Tags	Enter user defined tags.

Element	Description
Approver User	Click to select the approver user.
Approver Role	Click to select the approver role.
Certifier User	Click to select the certifier user.
Certifier Role	Click to select the certifier role.
Fulfillment User	Click to select the fulfillment user.
Fulfillment Role	Click to select the fulfillment role.
Certifiable	Select to enable the role to appear in the certification.
Auditable	Select to enable the role to appear in audit.
Requestable	Select to mark the role as Requestable entity.

Use this tab to displays the parent roles from which it inherits permissions from.

Hierarchy - Inherits From

Element	Description
Actions	Select the following options from the Actions menu: • **Add:** Click to add parent role. • **Remove:** Click to remove the selected role. • **Undo:** Click to undo previous action. • **Refresh:** Click to update the screen with any changes made on the (back-end) server.
View	Choose commands from the View menu to control how the columns are displayed: • **Column:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Reorder Column:** Click to open a dialog that lets you change the order of the table columns. • **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.
Add	Click **Add** to add a parent role.
Remove	Click Remove to remove a parent role that is selected.

Element	Description
Undo	Click to undo previous action.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.
	Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Hierarchy - Add Parent Roles

Element	Description
Search Role list	Select an attribute based on which you can search the Role. The attributes are Display Name, Name, Role E-mail, Role Description, or Role Namespace.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular format.

Results	Displays the search result.
	Select the following options from the View menu:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Role Description, Display Name, Role E-mail, Role Key, Name, or Role Category. Ascending or Descending.
	    * Then By: Role Description, Display Name, Role E-mail, Role Key, Name, or Role Category. Ascending or Descending.
	    * Then By: Role Description, Display Name, Role E-mail, Role Key, Name, or Role Category. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Add Selected	Select the required role and click **Add Selected** to move it to Selected Roles table.

Element	Description
All Add	Click to add all the roles listed in the Result list.
Remove Selected	Select the required roles and click **Remove Selected** to deselect them from Selected Roles list.
Remove All	Click to remove all the roles listed in the Selected Roles list.
Selected Roles	Displays the list of selected roles. • **Columns:** Click a column header name to quickly show or hide a single column. • **Sort** – Ascending – Descending – Advanced * Sort By: Role Description, Display Name, Role E-mail, Role Key, Name, or Role Category. Ascending or Descending. * Then By: Role Description, Display Name, Role E-mail, Role Key, Name, or Role Category. Ascending or Descending. * Then By: Role Description, Display Name, Role E-mail, Role Key, Name, or Role Category. Ascending or Descending. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
Select	Click to add the Role. Roles are listed in the Inherited from Panel.
Cancel	Click to close the window without adding roles.

Hierarchy - Inherited By

Use this tab to displays the child roles which inherit permissions from this role.

Element	Description
Actions	**Refresh:** Click to update the screen with any changes made on the (back-end) server.

Element	Description
View	Choose commands from the View menu to control how the columns are displayed: • **Column:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Reorder Column:** Click to open a dialog that lets you change the order of the table columns. • **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.
	Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Access Policy

Use this tab to add access policies to define access rights of this role.

Element	Description
Action	Select the following options from the Actions menu: • **Add:** Click to add new access policy. • **Remove:** Click to remove the selected access policy. • **Undo:** Click to undo previous action. • **Refresh:** Click to update the screen with any changes made on the (back-end) server.

Element	Description

View	Displays the list of selected roles.
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort:**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Policy Description or Policy Name. Ascending or Descending.
	    * Then By: Policy Description or Policy Name. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to refine the search results by providing additional filters.

Add	Click **Add** to add a new access policy.
Remove	Click **Remove** to remove the selected access policy.
Undo	Click **Undo** to undo previous action.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
	Click to refine the search results by providing additional filters.
Detach	Click to open the table in a larger window.

Access Policy - Add Access Policies

Elements	Description
Search policy list	Select any one of the following search conditions: • **Policy Name:** To search the policy by name. • **Policy Description:** To search the policy by description.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click the search icon to search for policy.

Elements	Description

Results	Displays the search result.
	Select the following options from the View menu:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * **Sort By:** Policy Name or Description. Ascending or Descending.
	    * **Then By:** Policy Name or Description. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Add Selected	Select the required capability and click **Add Selected** to add any access policy selected from the Result table.
Add All	Click to add all the access policies listed in the Results table.

Selected Policies	Displays the search result.
	Select the following options from the View menu:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * **Sort By:** Policy Name or Description. Ascending or Descending.
	    * **Then By:** Policy Name or Description. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Remove Selected	Select the required policy and click **Remove Selected** to deselect any policy from Selected Policies table.
Remove All	Click to remove all the policies listed in the Selected Policies table.

Elements	Description
Select	Click to add the Access Policy. Access Policies are listed in the Assign Access Policy Panel.
Cancel	Click to close the window without adding.

Members

Use this tab to define members to this role manually or via a membership rule.

Element	Description
User Membership Rule	Displays the membership rules.
Member assignment	Displays the user assigned.

User Membership Rule

Element	Description
Create Membership Rule	Click to add membership rule. Expression builder window opens.
Evaluate Rule Later	Select if the rule has to be evaluated later.
Edit Rule	Click to edit the membership rule.
Delete Rule	Click to delete the membership rule.

Member Assignment

Element	Description
Assign Users	Click to assign user. Assign user window opens.
Direct Members	Displays the members that are statically assigned to the open role.
Rule Based Members	Displayed the members that are assigned to the open role via membership rules.
Indirect Members	Displays the members that are indirectly assigned to this role.
All Members	Displays all the members, direct and rule based which are assigned to the open role.
Pending Members	Displays the members that are pending to this role.

Element	Description
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Sort** – Ascending – Descending – Advanced * Sort By: Ascending or Descending. * Then By: Ascending or Descending. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns. • **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.
Assign	Click to assign static users. The Assign Users search dialog box is displayed.
Revoke	Click to revoke a user.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.

Organizations

Using this tab you can view the list of Organization that this role is available to.

Element	Description
Action	Select the following options from the Actions menu: • **Add:** Click to add new organization. • **Remove:** Click to remove the selected organization. • **Undo:** Click to undo previous action. • **Refresh:** Click to update the screen with any changes made on the (back-end) server.

Element	Description

View	Displays the list of selected roles.
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Organization Name, Type, Hierarchy Aware, or Pending Action. Ascending or Descending.
	    * Then By: Organization Name, Type, Hierarchy Aware, or Pending Action. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to refine the search results by providing additional filters.

Add	Click **Add** to add a new organization.
Remove	Click **Remove** to remove the selected organization.
Undo	Click **Undo** to undo previous action.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
	Click to refine the search results by providing additional filters.
Detach	Click to open the table in a larger window.

Add Organizations

Element	Description
Search list	Select an attribute based on which you can search the Organization. The attributes are Organization Name, Type, Organization Status, Parent Organization Name, or Certifier User Name.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular format.

Element	Description

Results	Displays the search result.
	Select the following options from the View menu:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Organization Name, Type, or Organization Status. Ascending or Descending.
	    * Then By: Organization Name, Type, or Organization Status. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	• **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.

Add Selected	Select the required organization and click **Add Selected** to add it to Selected Organization list.
Add All	Click to add all the organizations listed in the Result list.

Selected Organization	Displays the list of selected organizations.
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort**
	  – Ascending
	  – Descending
	  – Advanced
	    * Sort By: Organization Name, Type, or Organization Status. Ascending or Descending.
	    * Then By: Organization Name, Type, or Organization Status. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.

Remove Selected	Select the required organization and click **Remove Selected** to deselect any organization from Selected organization list.
Remove All	Click to remove all the organization listed in the Selected organization list.
Select	Click to add the organization. Organizations are listed in the Assign organization Panel.
Cancel	Click to close the window without adding organizations.

History

Using this tab you can view history of changes in the specified date range for this role.

Element	Description
Search History	Select the date range. Click to select the date.
Search	Click to search the history for the selected date range.
Reset	Click to reset the values of the search fields.
Attributes	Displays the attributes associated with the role.
Hierarchy	Displays the role hierarchy associated with the role.
Access Policy	Displays the Access policy associated with the role.
Organization	Displays the Organization associated with the role.
Role Membership	Displays the role membership associated with the role.
Membership Rules	Displays the membership rules associated with the role.
Certification	Displays the certification associated with the role.

Related Topics

Viewing and Administering Roles in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Access Policies

Use this page to create and use access policies for users and resources.

Search

Element	Description
Search Access Policy list	Select any one of the following options: • **Name:** Select to search policy by name. • **Description:** Select to search policy by description.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular format.

Search Result

The search result section in the Access Policies page lets you create and view the details of Access Policy.

Element	Description
Actions	Select the following options from the Actions menu: • **Create:** Click to create a new Access Policy. • **Open:** Click to open selected Access Policy. • **Delete:** Click to delete selected Access Policy. • **Refresh:** Click to update the screen with any changes made on the (back-end) server.
View	Select the following options from the View menu: • **Column:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • **Sort:** Select to sort the Access Policies in ascending or descending orders. • **Reorder Column:** Click to open a dialog that lets you change the order of the table columns. • **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.
Create	Click **Create** to create a new Access Policy.
Open	Click **Open** to view details of the selected Access Policy.
Delete	Click **Delete** to delete the selected Access Policy.
Refresh	Select to refresh the view of Access Policies list.
	Select to show or hide the Query By Example (QBE) fields in this page.
Detach	Select to detach this page in a separate window.

Related Topics

Managing Access Policies in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Access Policy

Use this page to create a new access policy.

Element	Description
Back	Click **Back** to navigate to the Attributes tab.
Cancel	Click **Cancel** to cancel the changes made to the page.
Next	Click **Next** to navigate to the Applications tab.
Finish	Click **Finish** to create the access policy. This button is enables when you are in the Applications tab.

Attributes

Element	Description
Name	Enter name of the access policy.
Description	Enter description of the access policy.
Owner list	Select the owner type from the list: • **USER:** Select if the owner is a user. This is the default type. • **ROLE:** Select if the access policy is owned by a role.
Owner text box	Enter the owner details based on the selected owner type.
	Click to search for user or role.
Retrofit	Click to retrofit this access policy when it is created. If you set the **Retrofit** option, then any changes to access policy data will be updated to existing users.
Priority Level	Enter the appropriate priority level for the access policy.

Select Owner

Element	Description
Search list	Select an attribute based on which you can search the role or user.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular format.

Element	Description
Result	Displays the search result. Select the following options from the View menu: • **Columns:** Select to display the options to show or hide columns. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort**: Select to sort the user or role in ascending or descending order. • **Reorder Columns**: Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Select	Click Select to add the selected role or user as the access policy owner.
Cancel	Click to close the window without adding owner.

Application

Use this tab to select the application instances that needs to be provisioned or denied for this access policy.

Provisioned Applications

Use this tab to select the application instances that need to be provisioned for this access policy.

Element	Description
View	Select one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Display Name, Description, or Constraints. Select Show All to display all the columns. Select Manage Columns to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort:** Select to sort the applications in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Add	Click to add an application instance to be provisioned. Add Application Instance window opens.
Delete	Click **Delete** to delete the selected application instance from the list.

Element	Description
Detach	Click to detach this page in a separate window.

Denied Applications

Use this tab to select the application instances that need to be denied by this access policy.

Element	Description
View	Select one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Display Name or Description. Select Show All to display all the columns. Select Manage Columns to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort:** Select to sort the applications in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Add	Click to add an application instance to be denied. Add Application Instance window opens.
Delete	Click **Delete** to delete the selected application instance from the list.
Detach	Click to detach this page in a separate window.

Add Application Instance

Element	Description
Search list	Select any one of the following search conditions: • **Display Name:** To search the application instance by display name. **Name:** To search the application instance by name.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click the search icon to search for application instance.

Element	Description
Results	Displays the search result. Select the following options from the View Menu: • **Columns:** Select to display the options to show or hide columns, such as Display Name, Description, or Constraints. Select Show All to display all the columns. Select Manage Columns to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort:** Select to sort the applications in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Add Selected	Select the required application instance and click **Add Selected** to add it to from Selected Application Instance table.
Add All	Click to add all the application instance listed in the Result table.
Selected Application Instance	Displays the list of selected application instance. • **Columns:** Select to display the options to show or hide columns, such as Display Name, Description, or Constraints. Select Show All to display all the columns. Select Manage Columns to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort:** Select to sort the applications in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Remove Selected	Select the required application instance and click **Remove Selected** to deselect any application instance from Selected Application Instance table.
Remove All	Click to remove all the application instances listed in the Selected application instance table.
Select	Click to add application instance.
Cancel	Click to close the window without adding application instance.

Related Topics

Creating Access Policies in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Open Access Policy

Use the Open Access Policy page to modify information of existing access policy.

Attribute

Element	Description
Name	Enter name of the access policy.
Description	Enter description of the access policy.
Owner list	Select the owner type from the list: • **USER:** Select if the owner is a user. This is the default type. • **ROLE:** Select if the access policy is owned by a role.
Owner text box	Enter the owner details based on the selected owner type.
	Click to search for user or role.
Retrofit	Click to retrofit this access policy when it is created. If you set the **Retrofit** option, then any changes to access policy data will be updated to existing users.
Priority Level	Enter the appropriate priority level for the access policy.

Select Owner

Element	Description
Search list	Select an attribute based on which you can search the role or user.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular.

Element	Description
Result	Displays the search result. Select the following options from the View menu: • **Columns:** Select to display the options to show or hide columns. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort:** Select to sort the user or role in ascending or descending order. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Select	Click Select to add the selected role or user as the access policy owner.
Cancel	Click to close the window without adding owner.

Applications

Use this tab to modify the application instances that needs to be provisioned or denied for this access policy.

Provisioned Applications

Use this tab to modify the application instances that needs to be provisioned for this access policy.

Element	Description
View	Select one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Display Name, Description, Pending Action or Constraints. Select Show All to display all the columns. Select Manage Columns to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort:** Select to sort the applications in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Add	Click to add an application instance to be provisioned. Add Application Instance window opens.
Delete	Click **Delete** to delete the selected application instance from the list.

Element	Description
Detach	Click to detach this page in a separate window.

Denied Applications

Use this tab to modify the application instances that needs to be denied by this access policy.

Element	Description
View	Select one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Display Name, Description, or Pending Action. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort:** Select to sort the applications in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Add	Click to add an application instance to be denied. Add Application Instance window opens.
Delete	Click **Reorder Columns:** To delete the selected application instance from the list.
Detach	Click to detach this page in a separate window.

Add Application Instance

Element	Description
Search list	Select any one of the following search conditions: • **Display Name:** To search the application instance by display name. **Name:** To search the application instance by name.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click the search icon to search for application instance.

Element	Description
Results	Displays the search result. Select the following options from the View Menu: • **Columns:** Select to display the options to show or hide columns, such as Display Name, Description, or Constraints. Select Show All to display all the columns. Select Manage Columns to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort:** Select to sort the applications in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Add Selected	Select the required application instance and click **Add Selected** to add it to from Selected Application Instance table.
Add All	Click to add all the application instances listed in the Result table.
Selected Application Instance	Displays the list of selected application instance. • **Columns:** Select to display the options to show or hide columns, such as Display Name, Description, or Constraints. Select Show All to display all the columns. Select Manage Columns to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort:** Select to sort the applications in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Remove Selected	Select the required application instance and click **Remove Selected** to deselect any application instance from Selected Application Instance table.
Remove All	Click to remove all the application instances listed in the Selected application instance table.
Select	Click to add application instance.
Cancel	Click to close the window without adding application instance.

Roles

Use this tab to view the list of roles to which this access policy is currently assigned.

Element	Description
Search Roles list	Select any one of the following search conditions: • **Display Name:** To search the application instance by display name. **Name:** To search the application instance by name.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click the search icon to search for application instance.
View	Select the following options from the View Menu: • **Columns:** Select to display the options to show or hide columns, such as Name or Description. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort:** Select to sort the applications in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Detach:** Select to detach this page in a separate window. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns. • **Query By Example:** Select to show or hide the Query By Example(QBE) fields in the Roles tab.
	Click to show or hide the Query By Example (QBE) fields in the Roles tab.
Detach	Click to detach this page in a separate window.

Related Topics

Managing Access Policies in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Applications

The UI pages related to simplified application on-boarding are described in the following topics:

Applications

Use the Application option to configure new and existing applications.

Search

The Search section of the Applications page lets you search for applications.

Element	Description
Search list	Select any one of the following search conditions: • **Name:** To search the application by name. • **Display Name:** To search the application by type. • **Connector Name:** To search the application by connector name. • **Base Application:** To search the application by base application.
Search text box	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular format.

Search Result

The search result section in the Applications page lets you select and view the details of applications.

Element	Description

Action	Select any one of the following options from the Actions menu:
	• **Create:** Click to select the application type you want to create.
	  – **Create Target Application:** Click to create a target application.
	  – **Create Authoritative Application:** Click to create an authoritative application.
	• **Edit:** Click to open the edit application page that lets you modify the selected application.
	• **Clone:** Click to clone the selected application.
	• **Create Instance:** Click to create an instance of application.

Create	Click to select the application type you want to create. • **Create Target Application:** Click to create a target application. • **Create Authoritative Application:** Click to create an authoritative application.
Edit	Click to open the edit application page that lets you modify the selected application.
Clone	Click to clone the selected application.
Create Instance	Click to create an instance of application.
Rows	Select the number of applications that has to be displayed in one page, like 10, 20, 50, or 100.

Related Topics

Managing Application On-Boarding in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Target Application

You can use the Create Target Application option to create a target application.

- Create Target Application
- Create Target Application - Basic Information
- Create Target Application - Schema
- Create Target Application - Settings
- Create Target Application - Finish

Create Target Application

Use the Create Application page to create a target application.

Element	Description
Back	Click **Back** to navigate to the previous page.
Basic Information	Click to go to Basic Information tab.
Schema	Click to go to Schema tab.
Settings	Click to go to Settings tab.
Finish	Click to create the application.
Cancel	Click **Cancel** to cancel the changes made to this page.
Next	Click **Next** to navigate to the next page.

Related Topics

Creating Target Application in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Target Application - Basic Information

The Basic Information tab allows you to select the application you wish to onboard.

Element	Description
Disconnected	Select if you are creating application for a disconnected connector.
Connector Package	Select to create the application from connector package.
Template	Select to create the application from Template.
Select Bundle list	Select the template from the connector bundles list.
Alternate Connector Directory	Enter the alternate path from where connector template has to be loaded.
	Click to reload connector list after providing the alternate directory path.
Application Name	Enter the application name.
Display Name	Enter the display name.
Description	Enter description for the application.
Connector Display Name	Displays the name of the connector selected in **Select Connector** or **Select Template**.
Parent Application Name	Select the application name from the drop-down.

Element	Description
Basic Configuration	This tab displays the basic configuration parameters for the selected connector. Click **Test Connection**. Click against the parameter to view the description of the parameter. **Note:** The parameters in this tab will vary based on the type of connector you have selected.
Advanced Settings	This tab displays the advanced settings parameters for the selected connector. Click against the parameter to view the description of the parameter. **Note:** The parameters in this tab will vary based on the type of connector you have selected.

Related Topics

Creating Target Application in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Target Application - Schema

Use the Schema tab to manage Account and Entitlement schema attributes.

Element	Description
Add Attribute	Click to add new attribute.
Add Entitlement Form	Click to add entitlement form. • **Add Attribute:** Click to add attribute in the child form. • **Delete Form:** Click to delete the child form.

Element	Description
Account Attribute	
Identity Attribute	Select the user attribute to propagate the value during the user modify operation to provisioned accounts.
Display Name	Select the display name for the attribute.
Target Attribute	Enter the target attribute name or select the attribute name from the list.
Data Type	Select the data type from the list.
Provisioning Property	
Mandatory	Select if it is mandatory for target reconciliation.
Provision Field	Select if the attribute needs to be provisioned on target.
Reconciliation Properties	
Reconciliation Field	Select if reconciliation process needs to pull this attribute value.
Key Field	Select if attribute is used for unique check, for example account has to be created OR modified.
Case Insensitive	Select if the account matching rule is case-insensitive.
	Click to delete the attribute.
	Click to add additional properties to this attribute, like Lookup, Data, Ignore, or WriteBack. Advanced Flag pop-up is displayed. Select the property, select the dependent attribute and enter the value. Click **OK**.

Related Topics

Creating Target Application in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Target Application - Settings

Use the Settings tab to review and customize the default attributes.

Element	Description
Provisioning	Allows you to configure various activities to configure or customize provisioning workflow. **Global Configuration** • **Validation Script:** Click to include validation script. Validation Script editor is displayed. • **Transformation Script:** Click to include transformation script. Transformation Script editor is displayed. • **Account Name:** Select the account name. • **Account Discriminator:** Select the account discriminator. **Capabilities** • **Action:** Select the action for which you want to add pre and post action script. • **Action Script:** Click to open the Action Script editor. **Note:** This option is disabled for the applications that are created through Connector Installer.

Element	Description
Reconciliation	Allows you to define the matching criteria so that appropriate situation and responses can be applied during reconciliation. **Identity Correlation Rule** • **Simple Correlation Rule:** Select if you want to add a simple correlation rule. Creating an equation using the below options: – **Target Attribute:** Select the target attribute. – **Element Operator:** Select the operator from the list: Equals, Contains, Starts With, or Ends With. – **Identity Attribute:** Select the identity attribute from the list. **Case Sensitive:** Select if the equation is case sensitive. Click to delete the equation. **Add Rule Element:** Click add to include nested rules with **AND** or **OR** option. • **Complex Correlation Rule:** Select if you want to add a complex correlation rule. Click **Validate JSON Syntax** to validate the script syntax. **Note:** For more information on Validation and Transformation scripts and examples refer to *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*. **Situations And Responses** • **Situation:** Select the situation from the list. • **Response:** Select the response you want to set for the selected situation. • **Add:** Click to add new situation and response. • Click to delete the situation and response.

Element	Description
	Validation & Transformation • **Validation Script:** Click to include validation script. Validation Script editor is displayed. • **Transformation Script:** Click to include transformation script. Transformation Script editor is displayed. **Reconciliation Jobs** • **Full:** Click **Add Job** to add new job. New job window is displayed. • **Incremental:** Click **Add Job** to add new job. New job window is displayed. • **Delete:** Click **Add Job** to add new job. New job window is displayed. • **Entitlement:** Click **Add Job** to add new job. New job window is displayed.
Organization	Click **Add** to select the organization to which you want to publish this application. Add Organization window is displayed. Search and select the organization and click **OK**.
Catalog	Allows you to configure various configuration related Catalog metadata. • **Approver User:** Click to search and select the user. • **Manager:** Enter manager details. • **Category:** Displays the category as application instance. • **Certifiable:** Select **Yes** if the attribute is certifiable or **No** if it is not. • **Certifier User:** This field is displayed if the data is certifiable. Click to search and select the certifier user. • **Fulfillment Role:** Click to search and select the fulfillment role. • **Approver Role:** Click to search and select approver role. • **Auditable:** Select **Yes** if the attribute is auditable or **No** if it is not. • **Requestable:** Select **Yes** if the attribute is requestable or **No** if it is not. • **Risk Level:** Select the risk levels, High Risk, Medium Risk, or Low Risk. • **User Defined Tags:** Enter the user defined tag for this attribute. • **Fulfillment User:** Click to search and select the fulfillment user.

Related Topics

Creating Target Application in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Validation and Transformation of Provisioning Attributes in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Target Application - Finish

Use the Finish tab to view the summary of all the configurations made in previous tabs.

Element	Description
Save As Template	Click to save information as a template. Save As Template pop-up is displayed. Enter the following information: • **Template Name:** Enter template name. • **Description:** Enter description for the template. • **Cancel:** Click to exit without making any changes. • **OK:** Click to create the template.

Related Topics

Creating Target Application in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Authoritative Application

You can use the Create Authoritative Application option to create an authoritative application.

- Create Authoritative Application Page
- Create Authoritative Application - Basic Information
- Create Authoritative Application - Schema
- Create Authoritative Application - Settings
- Create Authoritative Application - Finish

Create Authoritative Application Page

Use the Create Authoritative Application page to create an application.

Element	Description
Back	Click **Back** to navigate to the previous page.
Basic Information	Click to go to Basic Information tab.
Schema	Click to go to Schema tab.

Element	Description
Settings	Click to go to Settings tab.
Finish	Click to create the application.
Cancel	Click **Cancel** to cancel the changes made to this page.
Next	Click **Next** to navigate to the next page.

Related Topics

Creating Authoritative Application in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Authoritative Application - Basic Information

The Basic Information tab allows you to select the application you wish to onboard.

Element	Description
Connector	Select to create the application from connector package.
Select Connector list	Select the connector type from the list.
Alternate Connector Directory	Enter the alternate path from where connector template has to be loaded.
	Click to reload connector list after providing the alternate directory path.
Template	Select to create the application from Template.
Select Template	Select the template from the list.
Application Name	Enter the application name.
Display Name	Enter the display name.
Description	Enter description for the application.
Connector Display Name	Displays the name of the connector selected in **Select Connector** or **Select Template**.
Basic Configuration	This tab displays the basic configuration parameters for the selected connector. Click **Test Connection**. Click  against the parameter to view the description of the parameter. **Note:** The parameters in this tab will vary based on the type of connector you have selected.

Element	Description
Advanced Settings	This tab displays the advanced settings parameters for the selected connector. Click ? against the parameter to view the description of the parameter. **Note:** The parameters in this tab will vary based on the type of connector you have selected.

Related Topics

Creating Authoritative Application in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Authoritative Application - Schema

Use the Schema tab to manage Account and Entitlement schema attributes.

Element	Description
Add Attribute	Click to add new attribute which provides ability to manage additional Account or Entitlement attributes from Target system for Provisioning and Reconciliation.
Application Attribute	
Identity Display Name	Select the identity display name from the list.
Target Attribute	Enter the target attribute name.
Data Type	Select the data type from the list.
Reconciliation Properties	
Mandatory	Select if it is mandatory for target reconciliation.
Reconciliation Field	Select if reconciliation process needs to pull this attribute value.
Advanced	Click to add additional properties to this attribute, like Default Value. Advanced Flag pop-up is displayed. Enter the Default Value and click **OK**.
Delete	Click to delete the attribute.

Related Topics

Creating Authoritative Application in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Authoritative Application - Settings

Use the Settings tab to review and customize the default attributes.

Element	Description
Reconciliation	Allows you to define the matching criteria so that appropriate situation and responses can be applied during reconciliation. **Identity Correlation Rule** • **Simple Correlation Rule:** Select if you want to add a simple correlation rule. Creating an equation using the below options: – **Target Attribute:** Select the target attribute. – **Element Operator:** Select the operator from the list: Equals, Contains, Starts With, or Ends With. – **Identity Attribute:** Select the identity attribute from the list. **Case Sensitive:** Select if the equation is case sensitive. Click to delete the equation. **Add:** Click **Add** to include additional equation with **AND** or **OR** option. • **Complex Correlation Rule:** Select if you want to add a complex correlation rule. Click **Validate JSON Syntax** to validate the script syntax. **Note:** For more information on Validation and Transformation scripts and examples refer to *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*. **Situations And Responses** • **Situation:** Select the situation from the list. • **Response:** Select the response you want to set for the selected situation. • **Add:** Click to add new situation and response. • Click to delete the situation and response.

Element	Description
	Validation & Transformation • **Validation Script:** Click to include validation script. Validation Script editor is displayed. • **Transformation Script:** Click to include transformation script. Transformation Script editor is displayed. **Reconciliation Jobs** • **Full:** Click **Add Job** to add new job. New job window is displayed. • **Incremental:** Click **Add Job** to add new job. New job window is displayed. • **Delete:** Click **Add Job** to add new job. New job window is displayed.
Organization	Click **Add** to select the organization to which you want to publish this application. Add Organization window is displayed. Search and select the organization and click **OK**.

Related Topics

Creating Authoritative Application in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Validation and Transformation of Provisioning Attributes in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Authoritative Application - Finish

Use the Finish tab to view the summary of all the configurations made in previous tabs.

Element	Description
Save as Template	Click to save information as a template. Save As Template pop-up is displayed. Enter the following information: • **Template Name:** Enter template name. • **Description:** Enter description for the template. • **Cancel:** Click to exit without making any changes. • **OK:** Click to create the template.

Related Topics

Creating an Authoritative Application in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Edit Target Applications

Use the Edit Target Applications page to modify the application details.

Element	Description
Apply	Click to modify the application.
Cancel	Click to exit without making any changes.

Basic Information

Use the Basic Information tab to view the basic information of the application.

Element	Description
Application Name	Display the application name.
Display Name	Enter the display name.
Description	Enter description for the application.
Connector Display Name	Displays the name of the connector selected in **Select Template**.
Parent Application Name	Select the application name from the drop-down.
Basic Configuration	This tab displays the basic configuration parameters for the selected connector. Click **Test Connection**. Click ? against the parameter to view the description of the parameter.

> **Note:**
>
> The parameters in this tab will vary based on the type of connector you have selected.

Element	Description
Advanced Settings	This tab displays the advanced settings parameters for the selected connector. Click ? against the parameter to view the description of the parameter. **Note:** The parameters in this tab will vary based on the type of connector you have selected.

Schema

Use the Schema tab to modify the Account and Entitlement schema attributes.

Element	Description
Add Attribute	Click to add new attribute.
Add Child Form	Click to add child form. • **Add Attribute:** Click to add attribute in the child form. • **Delete Form:** Click to delete the child form.
Account Attribute	
Identity Attribute	Select the user attribute to propagate the value during the user modify operation to provisioned accounts.
Display Name	Select the display name for the attribute.
Target Attribute	Enter the target attribute name or select the attribute name from the list.
Data Type	Select the data type from the list.
Provisioning Property	
Mandatory	Select if it is mandatory for target reconciliation.
Provision Field	Select if the attribute needs to be provisioned on target.
Reconciliation Properties	
Reconciliation Field	Select if reconciliation process needs to pull this attribute value.
Key Field	Select if attribute is used for unique check, for example account has to be created OR modified.

Element	Description
Case Sensitive	Select if the account matching rule is case-sensitive.
	Click to delete the attribute.
	Click to add additional properties to this attribute, like Lookup, Data, Ignore, or WriteBack. Advanced Flag pop-up is displayed. Select the property, select the dependent attribute and enter the value. Click **OK**.

Settings

Use the Settings tab to modify the default attributes.

Element	Description
Provisioning	Allows you to configure various activities to configure or customize provisioning workflow. **Global Configuration** • **Validation Script:** Click to include validation script. Validation Script editor is displayed. • **Transformation Script:** Click to include transformation script. Transformation Script editor is displayed. • **Account Name:** Select the account name. • **Account Discriminator:** Select the account discriminator. **Capabilities** • **Action:** Select the action for which you want to add pre and post action script. • **Action Script:** Click to open the Action Script editor. **Note:** This option is disabled for the applications that are created through Connector Installer.

Element	Description
Reconciliation	Allows you to define the matching criteria so that appropriate situation and responses can be applied during reconciliation. **Identity Correlation Rule** • **Simple Correlation Rule:** Select if you want to add a simple correlation rule. Creating an equation using the below options: – **Target Attribute:** Select the target attribute. – **Element Operator:** Select the operator from the list: Equals, Contains, Starts With, or Ends With. – **Identity Attribute:** Select the identity attribute from the list. **Case Sensitive:** Select if the equation is case sensitive. Click to delete the equation. **Add:** Click **Add** to include nested rules with **AND** or **OR** option. • **Complex Correlation Rule:** Select if you want to add a complex correlation rule. Click **Validate JSON Syntax** to validate the script syntax. **Note:** For more information on Validation and Transformation scripts and examples refer to *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*. **Situations And Responses** • **Situation:** Select the situation from the list. • **Response:** Select the response you want to set for the selected situation. • **Add:** Click to add new situation and response. • Click to delete the situation and response.

Element	Description
	Validation & Transformation • **Validation Script:** Click to include validation script. Validation Script editor is displayed. • **Transformation Script:** Click to include transformation script. Transformation Script editor is displayed. **Reconciliation Jobs** • **Full:** Click **Add Job** to add new job. New job window is displayed. • **Incremental:** Click **Add Job** to add new job. New job window is displayed. • **Delete:** Click **Add Job** to add new job. New job window is displayed. • **Entitlement:** Click **Add Job** to add new job. New job window is displayed.
Organization	Click **Add** to select the organization to which you want to publish this application. Add Organization window is displayed. Search and select the organization and click **OK**.
Catalog	Allows you to configure various configuration related Catalog metadata. • **Approver User:** Click to search and select the user. • **Manager:** Enter manager details. • **Category:** Displays the category as application instance. • **Certifiable:** Select **Yes** if the attribute is certifiable or **No** if it is not. • **Certifier User:** This field is displayed if the data is certifiable. Click to search and select the certifier user. • **Fulfillment Role:** Click to search and select the fulfillment role. • **Approver Role:** Click to search and select approver role. • **Auditable:** Select **Yes** if the attribute is auditable or **No** if it is not. • **Requestable:** Select **Yes** if the attribute is requestable or **No** if it is not. • **Risk Level:** Select the risk levels, High Risk, Medium Risk, or Low Risk. • **User Defined Tags:** Enter the user defined tag for this attribute. • **Fulfillment User:** Click to search and select the fulfillment user.

Related Topics

Edit Applications in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Validation and Transformation of Provisioning Attributes in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Edit Authoritative Application

Use the Edit Authoritative Applications page to modify the application details.

Element	Description
Apply	Click to modify the application.
Cancel	Click to exit without making any changes.

Basic Information

Use the Basic Information tab to view the basic information of the application.

Element	Description
Connector	Select to create the application from connector package.
Select Connector list	Select the connector type from the list.
Alternate Connector Directory	Enter the alternate path from where connector template has to be loaded.
	Click to reload connector list after providing the alternate directory path.
Template	Select to create the application from Template.
Select Template	Select the template from the list.
Application Name	Enter the application name.
Display Name	Enter the display name.
Description	Enter description for the application.
Connector Display Name	Displays the name of the connector selected in **Select Template**.

Element	Description
Basic Configuration	This tab displays the basic configuration parameters for the selected connector. Click **Test Connection**. Click ? against the parameter to view the description of the parameter. **Note:** The parameters in this tab will vary based on the type of connector you have selected.
Advanced Settings	This tab displays the advanced settings parameters for the selected connector. Click ? against the parameter to view the description of the parameter. **Note:** The parameters in this tab will vary based on the type of connector you have selected.

Schema

Use the Schema tab to modify the Account and Entitlement schema attributes.

Element	Description
Add Attribute	Click to add new attribute which provides ability to manage additional Account or Entitlement attributes from Target system for Provisioning and Reconciliation.
Application Attribute	
Identity Display Name	Select the identity display name from the list.
Target Attribute	Enter the target attribute name or select the attribute name from the list.
Data Type	Select the data type from the list.
Reconciliation Properties	

Element	Description
Mandatory	Select if it is mandatory for target reconciliation.
Reconciliation Field	Select if reconciliation process needs to pull this attribute value.
Advanced	Click to add additional properties to this attribute, like Default Value. Advanced Flag pop-up is displayed. Enter the Default Value and click **OK**.
Delete	Click to delete the attribute.

Settings

Use the Settings tab to modify the default attributes.

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Reconciliation</td><td>
Allows you to define the matching criteria so that appropriate situation and responses can be applied during reconciliation.
Identity Correlation Rule

Simple Correlation Rule: Select if you want to add a simple correlation rule. Creating an equation using the below options:

Target Attribute: Select the target attribute.
Element Operator: Select the operator from the list: Equals, Contains, Starts With, or Ends With.
Identity Attribute: Select the identity attribute from the list.

Case Insensitive: Select if the equation is case insensitive.
Click to delete the equation.
Add: Click Add to include additional equation with AND or OR option.

Complex Correlation Rule: Select if you want to add a complex correlation rule. Click Validate JSON Syntax to validate the script syntax.

<blockquote>
Note:
For more information on Validation and Transformation scripts and examples refer to Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance.
</blockquote>
Situations And Responses

Situation: Select the situation from the list.
Response: Select the response you want to set for the selected situation.
Add: Click to add new situation and response.
Click to delete the situation and response.

</td></tr>
</table>

Element	Description
	Validation & Transformation • **Validation Script:** Click to include validation script. Validation Script editor is displayed. • **Transformation Script:** Click to include transformation script. Transformation Script editor is displayed. **Reconciliation Jobs** • **Full:** Click **Add Job** to add new job. New job window is displayed. • **Incremental:** Click **Add Job** to add new job. New job window is displayed. • **Delete:** Click **Add Job** to add new job. New job window is displayed.
Organization	Click **Add** to select the organization to which you want to publish this application. Add Organization window is displayed. Search and select the organization and click **OK**.

Related Topics

Edit Applications in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Validation and Transformation of Provisioning Attributes in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Clone Target Application

Use the Clone Target Applications page to make a copy of the selected target application.

Element	Description
Apply	Click to clone a target application.
Cancel	Click to exit without making any changes.

Basic Information

The Basic Information tab allows you to select the application you wish to onboard.

Element	Description
Application Name	Enter the application name for the clone application.
Display Name	Enter the display name for the clone application.
Description	Enter description for the clone application.
Connector Display Name	Displays the name of the connector selected in **Select Connector** or **Select Template**.

Element	Description
Parent Application Name	Select the application name from the drop-down.
Basic Configuration	This tab displays the basic configuration parameters for the selected connector. Click **Test Connection**. Click ? against the parameter to view the description of the parameter. **Note:** The parameters in this tab will vary based on the type of connector you have selected.
Advanced Settings	This tab displays the advanced settings parameters for the selected connector. Click ? against the parameter to view the description of the parameter. **Note:** The parameters in this tab will vary based on the type of connector you have selected.

Schema

Use the Schema tab to manage Account and Entitlement schema attributes.

Element	Description
Add Attribute	Click to add new attribute.
Add Child Form	Click to add child form. • **Add Attribute:** Click to add attribute in the child form. • **Delete Form:** Click to delete the child form.
Account Attribute	
Identity Attribute	Select the user attribute to propagate the value during the user modify operation to provisioned accounts.

Element	Description
Display Name	Select the display name for the attribute.
Target Attribute	Enter the target attribute name or select the attribute name from the list.
Data Type	Select the data type from the list.
Provisioning Property	
Mandatory	Select if it is mandatory for target reconciliation.
Provision Field	Select if the attribute needs to be provisioned on target.
Reconciliation Properties	
Reconciliation Field	Select if reconciliation process needs to pull this attribute value.
Key Field	Select if attribute is used for unique check, for example account has to be created or modified.
Case Sensitive	Select if the account matching rule is case-sensitive.
	Click to delete the attribute.
	Click to add additional properties to this attribute, like Lookup, Data, Ignore, or WriteBack. Advanced Flag pop-up is displayed. Select the property, select the dependent attribute and enter the value. Click **OK**.

Settings

Use the Settings tab to review and customize the default attributes.

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Provisioning</td><td>Allows you to configure various activities to configure or customize provisioning workflow.
Global Configuration
Validation Script: Click to include validation script. Validation Script editor is displayed.
Transformation Script: Click to include transformation script. Transformation Script editor is displayed.
Account Name: Select the account name.
Account Discriminator: Select the account discriminator.
Capabilities
Action: Select the action for which you want to add pre and post action script.
Action Script: Click to open the Action Script editor.
Note:
This option is disabled for the applications that are created through Connector Installer.</td></tr>
</table>

Element	Description
Reconciliation	Allows you to define the matching criteria so that appropriate situation and responses can be applied during reconciliation. **Identity Correlation Rule** • **Simple Correlation Rule:** Select if you want to add a simple correlation rule. Creating an equation using the below options: – **Target Attribute:** Select the target attribute. – **Element Operator:** Select the operator from the list: Equals, Contains, Starts With, or Ends With. – **Identity Attribute:** Select the identity attribute from the list. **Case Insensitive:** Select if the equation is case insensitive. Click to delete the equation. **Add Rule Element:** Click **Add** to include nested rules with **AND** or **OR** option. • **Complex Correlation Rule:** Select if you want to add a complex correlation rule. Click **Validate JSON Syntax** to validate the script syntax. **Note:** For more information on Validation and Transformation scripts and examples refer to *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*. **Situations And Responses** • **Situation:** Select the situation from the list. • **Response:** Select the response you want to set for the selected situation. • **Add:** Click to add new situation and response. • Click to delete the situation and response.

Element	Description
	Validation & Transformation • **Validation Script:** Click to include validation script. Validation Script editor is displayed. • **Transformation Script:** Click to include transformation script. Transformation Script editor is displayed. **Reconciliation Jobs** • **Full:** Click **Add Job** to add new job. New job window is displayed. • **Incremental:** Click **Add Job** to add new job. New job window is displayed. • **Delete:** Click **Add Job** to add new job. New job window is displayed. • **Entitlement:** Click **Add Job** to add new job. New job window is displayed.
Organization	Click **Add** to select the organization to which you want to publish this application. Add Organization window is displayed. Search and select the organization and click **OK**.
Catalog	Allows you to configure various configuration related Catalog metadata. • **Approver User:** Click  to search and select the user. • **Manager:** Enter manager details. • **Category:** Displays the category as application instance. • **Certifiable:** Select **Yes** if the attribute is certifiable or **No** if it is not. • **Certifier User:** This field is displayed if the data is certifiable. Click  to search and select the certifier user. • **Fulfillment Role:** Click  to search and select the fulfillment role. • **Approver Role:** Click  to search and select approver role. • **Auditable:** Select **Yes** if the attribute is auditable or **No** if it is not. • **Requestable:** Select **Yes** if the attribute is requestable or **No** if it is not. • **Risk Level:** Select the risk levels, High Risk, Medium Risk, or Low Risk. • **User Defined Tags:** Enter the user defined tag for this attribute. • **Fulfillment User:** Click  to search and select the fulfillment user.

Related Topics

Cloning Applications in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Validation and Transformation of Provisioning Attributes in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Clone Authoritative Application

Use the Clone Authoritative Applications page to make a copy of the selected authoritative application.

Element	Description
Apply	Click to clone an authoritative application.
Cancel	Click to exit without making any changes.

Basic Information

The Basic Information tab allows you to select the application you wish to onboard.

Element	Description
Application Name	Enter the application name for the clone application.
Display Name	Enter the display name for the clone application.
Description	Enter description for the clone application.
Connector Display Name	Displays the name of the connector selected in **Select Connector** or **Select Template**.
Basic Configuration	This tab displays the basic configuration parameters for the selected connector. Click **Test Connection**. Click ? against the parameter to view the description of the parameter. **Note:** The parameters in this tab will vary based on the type of connector you have selected.

Element	Description
Advanced Settings	This tab displays the advanced settings parameters for the selected connector. Click ? against the parameter to view the description of the parameter. **Note:** The parameters in this tab will vary based on the type of connector you have selected.

Schema

Use the Schema tab to manage Account and Entitlement schema attributes.

Element	Description
Add Attribute	Click to add new attribute which provides ability to manage additional Account or Entitlement attributes from Target system for Provisioning and Reconciliation.
Application Attribute	
Identity Display Name	Select the identity display name from the list.
Target Attribute	Enter the target attribute name or select the attribute name from the list.
Data Type	Select the data type from the list.
Reconciliation Properties	
Mandatory	Select if it is mandatory for target reconciliation.
Reconciliation Field	Select if reconciliation process needs to pull this attribute value.
Advanced	Click to add additional properties to this attribute, like Default Value. Advanced Flag pop-up is displayed. Enter the Default Value and click **OK**.
Delete	Click to delete the attribute.

Settings

Use the Settings tab to review and customize the default attributes.

Element	Description
Reconciliation	Allows you to define the matching criteria so that appropriate situation and responses can be applied during reconciliation. **Identity Correlation Rule** • **Simple Correlation Rule:** Select if you want to add a simple correlation rule. Creating an equation using the below options: – **Target Attribute:** Select the target attribute. – **Element Operator:** Select the operator from the list: Equals, Contains, Starts With, or Ends With. – **Identity Attribute:** Select the identity attribute from the list. **Case Insensitive:** Select if the equation is case insensitive. Click to delete the equation. **Add:** Click **Add** to include additional equation with **AND** or **OR** option. • **Complex Correlation Rule:** Select if you want to add a complex correlation rule. Click **Validate JSON Syntax** to validate the script syntax. **Note:** For more information on Validation and Transformation scripts and examples refer to *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*. **Situations And Responses** • **Situation:** Select the situation from the list. • **Response:** Select the response you want to set for the selected situation. • **Add:** Click to add new situation and response. • Click to delete the situation and response.

Element	Description
	Validation & Transformation • **Validation Script:** Click to include validation script. Validation Script editor is displayed. • **Transformation Script:** Click to include transformation script. Transformation Script editor is displayed. **Reconciliation Jobs** • **Full:** Click **Add Job** to add new job. New job window is displayed. • **Incremental:** Click **Add Job** to add new job. New job window is displayed. • **Delete:** Click **Add Job** to add new job. New job window is displayed.
Organization	Click **Add** to select the organization to which you want to publish this application. Add Organization window is displayed. Search and select the organization and click **OK**.

Related Topics

Cloning Applications in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Validation and Transformation of Provisioning Attributes in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Instance Application

Use the Create Instance Application page to create an Instance of an Applications.

Element	Description
Apply	Click to create the instance of application.
Cancel	Click to exit without making any changes.

Basic Information

Element	Description
Application Name	Enter the application name.
Base Application	Displays the base application name.
Display Name	Enter the display name.
Description	Enter description for the application.
Parent Application Name list	Select the parent application from the list.

Element	Description
Basic Configuration	This tab displays the basic configuration parameters for the selected connector. Click **Test Connection**. Click against the parameter to view the description of the parameter. **Note:** The parameters in this tab will vary based on the type of connector you have selected.

Settings

Depending on the Base Application that is selected, Settings tab is populated with information that can be updated.

Element	Description
Organization	Click **Add** to select the organization to which you want to publish this application. Add Organization window is displayed. Search and select the organization and click **OK**.

Element	Description
Catalog	**Note:** Base Application is a Target Application then, Catalog tabs are displayed. Allows you to configure various configuration related Catalog metadata. • **Approver User:** Click to search and select the user. • **Manager:** Enter manager details. • **Category:** Displays the category as application instance. • **Certifiable:** Select **Yes** if the attribute is certifiable or **No** if it is not. • **Certifier User:** This field is displayed if the data is certifiable. Click to search and select the certifier user. • **Fulfillment Role:** Click to search and select the fulfillment role. • **Approver Role:** Click to search and select approver role. • **Auditable:** Select **Yes** if the attribute is auditable or **No** if it is not. • **Requestable:** Select **Yes** if the attribute is requestable or **No** if it is not. • **Risk Level:** Select the risk levels, High Risk, Medium Risk, or Low Risk. • **User Defined Tags:** Enter the user defined tag for this attribute. • **Fulfillment User:** Click to search and select the fulfillment user.

Related Topics

Creating Instance Applications in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

4
Compliance

Audit compliance tasks include managing identity certification and managing identity audit. These tasks are performed from the Compliance tab of Oracle Identity Self Service.

The Compliance section consists of the following pages:

- Compliance Home
- Dashboard Page
- Reports Tab
- Certification Configuration
- Certification Definitions
- New Certification
- Event Listeners
- Create Event Listener
- Risk Configuration
- Identity Audit Reports
- Configuration
- Rules Page
- Create Rule
- Policies Page
- Create Policy
- Preview Policy
- Scan Definitions Page
- Create Scan Definitions
- Scans
- Policy Violations Page
- Violation Details

Compliance Home

Use the Home page in the Compliance tab to manage identity certifications, identity audit rules, policies, scan definitions, and policy violations, and run identity audit reports.

Element	Description
Identity Certification	Click the Identity Certification tile, and select one of the following options to access pages related to identity certification: • **Dashboard:** Select to open the Certification Dashboard. • **Certification Configuration:** Select to open the Certification Configuration page. • **Definitions:** Select to open the Certification Definitions page. • **Event Listeners:** Select to open the Event Listener page. • **Risk Configurations:** Select to open the Risk Configuration page.
Reports	Click the Reports tile to access the Identity Audit Reports page.
Identity Audit	Click the Identity Audit tile, and select one of the following options to access pages related to identity audit: • **Configuration:** Select to open the Configuration page for general settings for identity audit. • **Rules:** Select to open the Rules page for identity audit. • **Policies:** Select to open the Policies page. • **Scan Definitions:** Select to open the Scan Definitions page. • **Policy Violations:** Select to open the Policy Violations page.

Related Topics

Compliance Home Page in Oracle Identity Self Service Interface in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Dashboard

Use the Dashboard page to search and view the details of in-progress and completed certifications.

Search

The Search section of the Dashboard lets you search for certifications.

Element	Description
Search Certification list	Select any one of the following search conditions: • **Certification Name:** To search the certifications by certification name. • **Organization:** To search the certifications by the organization name selected for the certification. • **Type:** To search the certifications by the certification type. • **Create Date:** To search the certifications by certification creation date.
Search Certifications text box	Enter a value for the search condition selected in the Search Certifications list.

Element	Description
Search Certifications icon	Click the search icon to search for certifications.
Advanced	Click the Advanced link to display the advanced search options.

Advanced Search

The Advanced search section lets you search for certifications based on detailed search criteria.

Element	Description
Match	Select any one of the following options: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Certification Name	Enter the certification name that you want to search.
Organization	Enter the organization name selected for the certification.
Type	Select the certification type, such as User, Role, Application Instance, and Entitlement.
Create Date	Enter the creation date of the certification you want to search.
Search	Click to search certifications based on the values entered in the advanced search fields.
Reset	Click to reset the values of the advanced search fields.
Save	Click to save the search conditions for later reuse.
Basic	Click to go back to simple search options.

Search Result

The search result section in the Dashboard lets you select and view the details of certifications.

Element	Description
Actions	Select the following options from the Actions menu: • **Open:** Select to open the selected certification. Alternatively, you can click **Open** on the toolbar, or click the certification name link. The certification details open in a separate tab, on which you can take action on the certification tasks. • **Refresh:** Select to refresh the view of certification list. Alternatively, you can click **Refresh** on the toolbar. • **Download to Editable Excel:** Select to display options to download user certification data to your local computer and work on it in an offline mode by using Microsoft Excel without having an active session with Oracle Identity Manager.

Element	Description
View	Select the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Name, Percentage Complete, Organization, or Type, of the certification table. Select Show All to display all the columns. Select Manage Columns to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Dashboard page in a separate window. • **Sort:** Select to sort the certifications in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Open	Click to open the selected certification. Alternatively, you can select **Open** from the Actions menu or click the certification name link. The certification details open in a separate tab, on which you can take action on the certification tasks.
Refresh	Select to refresh the view of certification list. Alternatively, you can select **Refresh** from the Actions menu.
Detach	Select to detach the Dashboard page in a separate window.
Show	Select any one of the following to refine the search result: • **New and In Progress:** Lists the certifications that are assigned to you and the certifications in progress. • **New:** Lists only the new certifications that are assigned to you. • **In Progress:** Lists only the certifications in progress. • **Completed:** Lists the certifications that are in the completed state. • **Expired:** Lists the certifications whose end date has passed. • **All:** Lists all types of certifications including new, in progress, and expired certifications.
Rows Displayed	Select the number of rows you want to display in the certifications search result.

Detail Information

The Detail Information section consists of tabs that lets you view the details of certifications, view the certification tasks that are part of the selected certification, and generate certification reports.

Element	Description
Certification Details	Displays the certification attributes such as name, percentage complete, and number of roles, accounts, entitlements, or users for the selected certification. A link to the requests page is also displayed if closed-loop remediation has been activated for the certification.
Certification Tasks	Displays a list of certification tasks that are part of the selected certification. This is a read-only view, and the user cannot take any action on the certification tasks.
Reports	Enables you to generate certification reports. This tab is displayed only if the report option is configured in Oracle Identity Manager.

Related Topics

Searching and Viewing Certifications in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Reports

Use the Reports tab in the Detail Information section of the Dashboard to generate certification reports.

Element	Description
Report Type	Select the type of report you want to generate based on the certification status, such as Complete Certification, Certified, Revoked, Abstained, or Certified Conditionally.
Report Format Output	Select the format in which you want to generate the report, such as HTML, PDF, or Microsoft Excel.
Display Action History	Select to include in the report the action history or trail of actions taken by all reviewers on the certification. Deselecting this option does not show the action history in the certification report.
Generate Report	Click to generate the certification report by exporting the certification information to the selected output format, such as HTML, PDF, or Microsoft Excel.

Related Topics

Generating Certification Reports From the Dashboard in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Certification Configuration

Use the Certification Configuration page to set default options in Oracle Identity Self Service that are used during certification creation based on the type of certification.

Element	Description
Password required on sign-off	Select to require users to sign off in order to complete a certification.
Allow comments on certify operations	Select to allow the user to type a comment if a certify action is selected. By default, a comment is required.
Allow comments on all non-certify operations	Select to allow the user to type a comment if a revoke action is selected. By default, a comment is required.
Verify employee access	Select to control if you want to view Page 1 in the user certification view. By default, this option is selected. This option is used in user certification.

Element	Description
Prevent self certification	Select to prevent reviewers from being able to certify their own access. Enabling this option allows the certification creator to assign the certification to an alternate reviewer. When the Prevent self certification option is enabled, the **User Manager** option is selected by default, which means that the assignee is the user's manager. To select any other user, select **Select User**. Click the Search icon to search and select an alternate reviewer.
User and Account Selections	Select any one of the following self-explanatory options: • Include only active users and active accounts • Include any user with active accounts • Include all users and all accounts
Allow advanced delegation	Select to enable the ability to delegate a line item to others. This option is not selected by default.
Allow multi-phased review	Select to enable collaborative certification, for which in phase 1 the business review is completed and that is followed by a phase 2 for the technical review followed by an optional final review, which is completed by the business reviewer again. This is used in user certification only.
Allow auto-claim	Select to mark all the items in page 1 as claimed by default. By default, auto claim is enabled. If you deselect this option, then users have to manually claim each item before they can view the item details.
Perform closed-loop remediation	Select to specify closed-loop remediation when certification is completed.
Enable Interactive Excel	Select to enable ADF DeskTop Integration (DI) for user certification that provides the user the option to download certification data to Microsoft Excel worksheet and work on it in offline mode.
Enable Certification Reports	Select to enable the creation of certification reports and display the Reports tab in the Detailed Information section of the Certification Dashboard.
Composite Name	Select the SOA composite for the certification workflow. The default composite is default/CertificationProcess. You can select another version of the composite to enable certification oversight in the certification workflow. To do so, select the CertificationOverseerProcess composite. This composite specifies that the reviewer's manager is the overseer for the certification process. This composite is also required for the group reviewer feature.

Element	Description
Save	Click this button to save the certification configuration changes.

Related Topics

Configuring Certifications in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Certification Definitions

Use the Certification Definitions page to create and manage certification definitions.

Element	Description
Actions	Select one of the following options from the Actions menu: • **Create:** Select to open the New Certification wizard for creating a new certification definition. • **Delete:** Select to delete a selected certification definition. • **Open:** Select to open the details of a selected certification definition. • **Run Now:** Select to create the certifications based on the selected certification definition. • **Refresh:** Select to refresh the list of certification definitions in the Certification Definitions page.
View	Select one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Name, Type, or Description, of the certification definitions table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Certification Definitions page in a separate window. • **Sort:** Select to sort the certification definitions in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns. • **Query By Example:** Select to show or hide the Query By Example (QBE) fields in the Certification Definitions page.
Create	Click to open the New Certification wizard for creating a new certification definition.
Delete	Click to delete a selected certification definition.
Open	Click to open the details of a selected certification definition.
Run Now	Click to create the certifications based on the selected certification definition.
Refresh	Click to refresh the list of certification definitions in the Certification Definitions page.
	Click to show or hide the Query By Example (QBE) fields in the Certification Definitions page.
Detach	Click to detach the Certification Definitions page in a separate window.
Page	Displays and lets you select and enter the page number.

Related Topics

Managing Certification Definitions in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

New Certification

Use the New Certification wizard to create new certification definitions for user, role, application instance, and entitlement certifications.

General Details

Use the General Details page of the New Certification wizard to enter general information about the certification definition, such as certification name, certification type, and description.

Element	Description
Name	Enter a name for the certification definition. This is a mandatory field.
Type	Select any one of the following: • **User:** Select to create new user certification definition. • **Role:** Select to create new role certification definition. • **Application Instance:** Select to create new application instance certification definition. • **Entitlement:** Select to create new entitlement certification definition. This is a mandatory field.
Description	Enter a description for the new certification definition.
Next	Click to go to the Base Selection page of the New Certification wizard.
Cancel	Click to quit the New Certification wizard without creating the certification definition.

Base Selection

Use the Base Selection page of the New Certification wizard to select an entity-selection strategy and selection constraints.

Element	Description
Base Selection	Select any one of the following options for user certification definition: • **Users from All Organizations:** Select to specify users from all organizations in Oracle Identity Manager. • **Only Users from Selected Organizations:** Manually select specific organizations. You can select the organizations by clicking **Add**. To remove a selected organization, click **Remove**. • **All users:** Select to specify all the users in Oracle Identity Manager. • **Users criteria:** Select to specify all the users that meet the given search condition. After entering the search conditions, click **Update and Preview Results**. • **Selected users:** Select to indicate specific users from a list of users in the system. To select users, click **Add**. To remove selected users, click **Remove**. Select any one of the following options for role certification definition: • **All Roles in All Organizations:** Select to specify all roles in all the organizations in Oracle Identity Manager. • **Roles from Selected Organizations:** Select to specify the roles from the organizations that you specify. Click **Add** to search and select an organization. To remove a selected organization, click **Remove**. • **All Roles:** Select to specify all roles in Oracle Identity Manager. • **Role criteria:** Select to specify all of the roles that meet the given search condition. You can preview the results of this selection. • **Selected roles:** Select to manually select the roles. Select any one of the following options for application instance certification definition: • **All Application Instances:** Select to specify all application instances in Oracle Identity Manager. • **Selected application instances only:** Select to manually select the application instances. Click **Add** to search and select the application instances. To remove any selected application instance, click **Remove**. Select any one of the following options for entitlement certification definition: • **Selected entitlements:** Select to manually select the entitlements. Click **Add** to search and select the entitlements. To remove any selected entitlement, click **Remove**. • **All Entitlements with Selected Certifiers:** Select to specify a list of users including all the entitlements for which they are the certifier user in the catalog. • **All Entitlements:** Select to specify all entitlements from the catalog. • **Entitlement Criteria:** Select to specify entitlements based on a criteria.

Element	Description
Selection Constraints	Select any one of the following self-explanatory options to specify constraints to the base selection for a user certification definition: • Users with Any Level of Risk • Only Users with High Risk Summaries • Only Users with High Risk Roles • Only Users with High Risk Application Instances • Only User with High Risk Entitlements Select any one of the following self-explanatory options to specify constraints to the base selection for a role certification definition: • Roles with Any Level of Risk • Only High Risk Roles Select any one of the following self-explanatory options to specify constraints to the base selection for a application instance certification definition: • Application Instances with Any Level of Risk • Only High Risk Application Instances Select any one of the following self-explanatory options to specify constraints to the base selection for a entitlement certification definition: • Entitlements with Any Level of Risk • Only High Risk Entitlements In addition, for entitlement certification definition, optionally deselect the **Include entitlements provisioned by access policy** option to exclude the entitlements from the certification definition that are provisioned by access policies. This option is selected by default.
Back	Click to go back to the General Details page of the New Certification wizard.
Next	Click to go to the Content Selection page of the New Certification wizard.
Cancel	Click to quit the New Certification wizard without creating the certification definition.

Content Selection

Use the Content Selection page of the New Certification wizard to specify the content of the certifications that will be created based on the certification definition.

Element	Description
Content Selection (for user certification definition)	Select one or more of the following options: • **Include users with no accounts:** This option includes the users who have no access within the certification. • **Limit the role-assignments to certify for each user:** The list of roles per user can be restricted to the selected option. For example, if you select selected roles and add one role, then that role only will show up in the certification if it is marked as certifiable in the catalog even if the user has other roles. • **Include accounts with no certification attributes:** This includes the accounts in the selected application instances even if there are no certifiable entitlements (access) within the target system. If you deselect this option, then accounts in the target system that do not have any entitlements do not appear in the certification. • **Limit the application-instance-assignments to certify each user:** Similar to roles, you can restrict the application instances you want to see within the certification. • **Limit the entitlement-assignments to certify for each user:** You can limit the entitlements that you can see within the certification.
Content Selection (for role certification definition)	Select one or more of the following options: • **Certify Policies:** Select to specify the certification of policies. • **Certify Members:** Select to specify the certification of role members.
Content Selection (for application instance certification definition)	Select any one of the following options: • **Accounts of Users from All Organizations:** Selects the accounts of users from all organizations in Oracle Identity Manager. • **Accounts of Users from Selected Organizations:** Allows you to manually select the organizations whose user accounts will be certified. • **Accounts of All Users:** Selects the accounts of all users in Oracle Identity Manager. • **Accounts of Selected Users:** Allows you to manually select the users whose accounts will be certified.
Content Selection (for entitlement certification definition)	Content selection for entitlement certification definitions is not applicable, and therefore, the Content Selection page is skipped for entitlement certification definitions.
Back	Click to go back to the Base Selection page of the New Certification wizard.
Next	Click to go to the Configuration page of the New Certification wizard.
Cancel	Click to quit the New Certification wizard without creating the certification definition.

Configuration

Use the Configuration page of the New Certification wizard to set options that are used during certification creation based on the type of certification.

Set the configuration options, as described in Certification Configuration.

Reviewers

Use the Reviewers page of the New Certification wizard to specify a primary reviewer for the certifications, or a phase one and two reviewers for multi-phased reviews.

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Reviewer (for user certification definition)</td><td>Select any one of the following options as the primary reviewer:

User Manager: Selects the user’s manager as the primary reviewer.
Organization Certifier: Select’s the organization certifier as the primary reviewer.
Search for a User: Selects any user as the primary reviewer that you search and specify by clicking the lookup icon.
Search for a Role: Selects all user members of any role that you select by clicking the lookup icon as the primary reviewer. Any user member of the role will be able to claim the task in order to review and certify. When the task is claimed by a user, other users in the role will not be able to view the task in the Inbox.

Group certifier assignments are not supported with CertificationProcess composite. If you want to specify a role as the primary reviewer, then you must select the CertificationOverseerProcess composite in the Configurations page of the wizard.
Custom Access Reviewer: A custom reviewer that you specify as the primary reviewer by populating the CERT_CUSTOM_ACCESS_REVIEWERS table in Oracle Identity Manager database.

For multi-phased review:

In the Phase 1 section, select any one of the following to select the Phase 1 reviewer:

User Manager: Selects the user's manager as the Phase 1 reviewer.
Organization Certifier: Selects the organization certifier as the Phase 1 reviewer.
Search for a User: Selects any user as the Phase 1 reviewer that you search and specify by clicking the lookup icon.
Search for a Role: Selects all user members of any role that you select by clicking the lookup icon as the Phase 1 reviewer. Any user member of the role will be able to claim the task in order to review and certify. When the task is claimed by a user, other users in the role will not be able to view the task in the Inbox. Group certifier assignments are not supported with CertificationProcess composite. If you want to select this option, then you must select the CertificationOverseerProcess composite in the Configurations page of the wizard.
Custom Access Reviewer: A custom reviewer that you specify as the Phase 1 reviewer by populating the CERT_CUSTOM_ACCESS_REVIEWERS table in Oracle Identity Manager database.

In the Phase 2 (Optional) section, select the Enable Phase 2 review process option to specify that the privilege certifier will be the primary Phase 2 reviewer for each user privilege, such as role, account, and entitlement assignments. Then, select any one of the following as the Phase 2 reviewer:

Certifier User: Selects the catalog certifier user as the Phase 2 reviewer.
Certifier Role: Selects the catalog certifier role as the Phase 2 reviewer. If a catalog item does not have a certifier role, then the task goes to the certifier user.

</td></tr>
</table>

<table>
<thead>
<tr><th>Element</th><th>Description</th></tr>
</thead>
<tbody>
<tr><td></td><td>In the Final Review (Optional) section, select the Enable Final Review process option to enable a final review process by the Phase 1 reviewer for final validation and sign off.</td></tr>
<tr><td>Reviewer (for role certification definition)</td><td>Select any one of the following options as the primary reviewer:
Role (Certifier User): Selects the certifier user as the primary reviewer.
Role (Certifier Role): Selects the certifier role as the primary reviewer.

Note:
Group certifier assignments are not supported with the default CertificationProcess composite. If you want to specify a role as the primary reviewer, then you must select the CertificationOverseerProcess composite in the Configurations page of the wizard.
Organization Certifier: Selects the organization certifier as the primary reviewer.
Search for a User: Selects any user as the primary reviewer that you search and specify by clicking the lookup icon.
Search for a Role: Selects all user members of any role that you select by clicking the lookup icon as the primary reviewer. Any user member of the role will be able to claim the task in order to review and certify. When the task is claimed by a user, other users in the role will not be able to view the task in the Inbox.</td></tr>
<tr><td>Reviewer (for application instance certification definition)</td><td>Select any one of the following options as the primary reviewer:
Application Instance (Certifier User): Selects the application instance certifier user as the primary reviewer.
Application Instance (Certifier Role): Selects the application instance certifier role as the primary reviewer.

Note:
Group certifier assignments are not supported with the default CertificationProcess composite. If you want to specify a role as the primary reviewer, then you must select the CertificationOverseerProcess composite in the Configurations page of the wizard.
User Manager: Selects the user’s manager as the primary reviewer.
Organization Certifier: Selects the organization certifier as the primary reviewer.
Search for a User: Selects any user as the primary reviewer that you search and specify by clicking the lookup icon.
Search for a Role: Selects all user members of any role that you select by clicking the lookup icon as the primary reviewer. Any user member of the role will be able to claim the task in order to review and certify. When the task is claimed by a user, other users in the role will not be able to view the task in the Inbox.</td></tr>
</tbody>
</table>

Element	Description
Reviewer (for entitlement certification definition)	Select any one of the following options as the primary reviewer: • **Entitlement (Certifier User):** Selects the entitlement certifier user as the primary reviewer. • **Entitlement (Certifier Role):** Selects the entitlement certifier role as the primary reviewer. **Note:** Group certifier assignments are not supported with the default CertificationProcess composite. If you want to specify a role as the primary reviewer, then you must select the CertificationOverseerProcess composite in the Configurations page of the wizard. • **Search for a User:** Selects any user as the primary reviewer that you search and specify by clicking the lookup icon. • **Search for a Role:** Selects all user members of any role that you select by clicking the lookup icon as the primary reviewer. Any user member of the role will be able to claim the task in order to review and certify. When the task is claimed by a user, other users in the role will not be able to view the task in the Inbox.
Back	Click to go back to the Configuration page of the New Certification wizard.
Next	Click to go to the Incremental page of the New Certification wizard.
Cancel	Click to quit the New Certification wizard without creating the certification definition.

Incremental

Use the Incremental page of the New Certification wizard to enable or disable incremental certification.

Element	Description
Generate Incremental Data	Select **Enabled** for Generate Incremental Data. This setting enables certifiers to certify or revoke only changes or inclusions made to a certification. It eliminates the need to review the access of users who have been certified.
Show Previous Values	(Optional) Select **Enabled** to specify that all the current values that existed in previous certifications are displayed with the last decisions taken for those access. Deselect **Enabled** to specify that the values that have already appeared in the previous certifications based on the Incremental Date Range parameter are not included in the certification.
Incremental Date Range	(Required) Select any one of the following options: • **Since Last Base (default):** Select to specify that certification data will be generated by comparing the current data against the last recorded, non-incremental certification data, for the same certification type. • **Since Date:** Select to specify that the current access of the user is compared against all the certifications of the same type since the given date and when the certification is created.

Element	Description
Back	Click to go back to the Reviewers page of the New Certification wizard.
Next	Click to go to the Summary page of the New Certification wizard.
Cancel	Click to quit the New Certification wizard without creating the certification definition.

Summary

Use the Summary page of the New Certification wizard to review the details of the certification definition.

Element	Description
Name	Verify the certification definition name.
Description	Verify the description of the certification definition.
Type	Verify the certification definition type, such as User, Role, Application Instance, or Entitlement.
Reviewer	Verify the primary reviewer of the certifications.
Incremental	Verify whether or not incremental certification has been enabled.
Base Selection	Verify the base selection and the selection constraints for the certification definition.
Content Selection	Verify the content selection for the certification definition.
Back	Click to go back to the Incremental page of the New Certification wizard.
Create	Click to create the certification definition. A message is displayed asking if you want to create a certification job based on the definition and run it now. You can edit the job name, and click **Yes** to run the certification job. Alternatively, click **No** to create a certification definition without creating and running the scheduled job. With this option, you must manually create a certification job later.
Cancel	Click to quit the New Certification wizard without creating the certification definition.

Related Topics

Creating Certification Definitions in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Event Listeners

Use the Event Listeners page to create and manage event listeners that detect specific business events and stores the event details for certification.

Element	Description
Actions	The Actions menu provides the following options: • **Create:** Select to open the Create Event Listener page that lets you specify event listener attribute values and create the event listener. • **Open:** Select to open a selected event listener for viewing or editing. • **Delete:** Select to delete a selected event listener.
View	The View menu provides the following options: • **Columns:** Select to display the options to show or hide columns, such as Name, Description, or Status of the event listeners table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Event Listeners page in a separate window. • **Sort:** Select to sort the event listeners in ascending or descending orders. Select Advanced to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns. • **Query By Example:** Select to show or hide the Query By Example (QBE) fields in the Event Listeners page.
Create	Click to open the Create Event Listener page that lets you specify event listener attribute values and create the event listener.
Open	Click to open a selected event listener for viewing or editing.
Delete	Click to delete a selected event listener.
Refresh	Click to refresh the view of the list of event listeners in the Event Listeners page.
	Click to show or hide the Query By Example (QBE) fields in the Event Listeners page.
Detach	Click to detach the Event Listeners page in a separate window.

Related Topics

About Event Listeners and Configuring Event Listeners and Certification Event Trigger Jobs in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Event Listener

Use the Create Event Listener page to create a new event listener by specifies the values for its attributes and adding a rule containing conditions that will be evaluated when an event takes place.

Element	Description
Name	Enter a name of the event listener.
Description	Enter a description for the event listener.
Certification Definition	Select a certification definition that will be executed.
Event Count	Enter the maximum number of events that should be processed for this listener at the time the Certification Event Trigger Job runs. Use this to avoid executing an action for bulk updates.
Status	Select either or **Active** or **Disabled** status of the event listener.
Event Trigger	Add a rule containing conditions that will be evaluated when an event takes place.
Create	Click to create the event listener.

Related Topics

Creating an Event Listener in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Risk Configuration

Use the Risk Configuration page to set default item-risk levels for metadata objects.

Element	Description
Catalog Item Defaults	Select **High**, **Medium**, or **Low** for role, application instances, and entitlement definitions to set default values assigned to new catalog entries during imports.
Provisioning Mechanism Mapping	Select **High**, **Medium**, or **Low** to configure the default risk levels for each of the following provisioning scenarios: • Reconciliation from target system • Direct provisioning by administrator • Access request • Provisioned by access policy • Rule based role assignment • Access policy harvesting
Last Certification Mapping	Select **High**, **Medium**, or **Low** to assign the associated risk level to each of the last actions performed against a certification entry: • Certify • Revoke • Abstain • Certify conditionally • No action taken

Element	Description
Identity Audit Mapping	Select **High**, **Medium**, or **Low** for each of the following risk factors related to identity audit violation: • Active Violation Cause • Cause Closed as Fixed Manually • Cause Closed as Risk Accepted • Remediation Requested for Cause

Related Topics

Setting Item Risk in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Identity Audit Reports

Use the Identity Audit Reports page to generate identity audit policy violation reports.

Element	Description
Report Type	Select one of the following types of report that you want to generate: • **Closed Policy Violation Report:** Select to generate a report containing all the policy violations that are in Closed state. • **Remediation Completed Policy Violation Report:** Select to generate a report containing all the policy violations that are in Remediation Completed state. • **Expired Policy Violation Report:** Select to generate a report containing all the policy violations that are in Expired state. • **Remediation In Progress Policy Violation Report:** Select to generate a report containing all the policy violations that are in Remediation In Progress state. • **Remediation Under Review Policy Violation Report:** Select to generate a report containing all the policy violations that are in Remediation Under Review state. • **Open Policy Violation Report:** Select to generate a report containing all the policy violations that are in Open state. • **Preview Policy Violation Report:** Select to generate a report containing all the policy violations that are in Preview state. • **Assigned Policy Violation Report:** Select to generate a report containing all the policy violations that are in Assigned state.
Category	Select any one of the following categories: • **By Remediator:** Select to generate the report by the remediator of the policy violation reports. Search and select a remediator user by clicking the search icon. • **By Scan Stop Date:** Select to generate the report by the scans run during a specified date range. Specify the dates in the From and To fields. • **By Policy:** Select to generate the report by the identity audit policies. Search and select a policy by clicking the search icon. • **By Manager:** Select to generate the report by the manager of the user entities for which policy violation occurred. Search and select the manager user by clicking the search icon. • **By User:** Select to generate the report by the user for which policy violation occurred. Search and select a user by clicking the search icon.

Element	Description
Report Format	Select a report format, such as PDF, HTML, or Excel.
Generate	To generate the identity audit report, which you can open or download, or optionally, click **Email Me** if you want the report to be sent via mail to a specified email address.

Related Topics

Generating Identity Audit Policy Violation Reports in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Configuration

Use the Configuration page, after identity audit is enabled, to configure how identity audit will work.

Element	Description
Prevent self remediation	Select to prevent the assigned remediator from remediating a policy violation when the remediator's attribute-values are among the causes of the violation. After selecting this option, ensure that the scan definition specifies an alternate remediator. Any policy violation that involves the primary remediator will be assigned to the alternate remediator.
Scan Run Details Retention Period	Enter the number of days for the retention period. Scan details older than the specified days will be purged.
User Batch Size	Enter the number of users per batch for a single processing thread.
Threads per scan	Enter the number of threads to be used while running a scan.
Composite Name	Select the SOA composite to be used to generate policy violation tasks. The default value is the `default/IdentityAuditRemediation` composite. If you want to use a custom composite to generate policy violation tasks, and then click the search icon adjacent to this field, search and select the composite from the Select a Composite dialog box, and click **Select**.
Maximum Risk Acceptance period for Policy Violation Causes	Enter the maximum number of days for which risk is accepted for policy violation causes.
Save	Click to save the values of the general settings in the Configuration page.
Reset	Click to reset the values in the fields to default.

Related Topics

Configuring Identity Audit in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Rules

Use the Rules page to search, create, and manage identity audit rules.

Search

The Search section of the Rules page lets you search for identity audit rules.

Element	Description
Search list	Select an attribute based on which you can search the rules. The attributes are Rule Name, Description, Created Date, and Owner Login.
Search text box	Enter a value of the selected attribute as the search criterion.
Search icon	Click to perform the search and display the results in a tabular format.
Advanced	Click the Advanced link to display the advanced search options.

Advanced Search

The Advanced search section lets you search for identity audit rules based on detailed search criteria.

Element	Description
Match	Select any one of the following options: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Rule Name	Select a search condition, such as Starts with or Equals, and enter the name of the identity audit rule that you want to search.
Description	Select a search condition and enter a rule description that you want to search.
Created Date	Select a search condition, such as On or before or Equals, click the Select Date icon to select a date based on which you want to search the identity audit rule.
Owner Login	Select a search condition and enter a rule owner login name that you want to search.
Search	Click to search the identity audit rules based on the values entered in the advanced search fields.
Reset	Click to reset the values of the advanced search fields.
Save	Click to save the search conditions for later reuse.
Add Fields	Click to display more field names. Select or deselect field name to add to or remove from advanced search.
Reorder	Click to open the Reorder Search Fields dialog box. Use the up and down arrow keys to reorder the search fields, and click **OK**.
Basic	Click to go back to simple search options.

Search Result

The search result section in the Rules page lets you open, create, and manage identity audit rules.

Element	Description
Actions	Select one of the following options from the Actions menu: • **Create:** Select to open the Create Rule page where you can create identity audit rules. • **Duplicate:** Select to create a duplicate of the selected rule with a number appended to the rule name. You can modify the duplicated rule to create a new rule. • **Open:** Select to open the Edit Rules page that lets you modify any attributes in this page, add/modify/delete the rule conditions, or group/ungroup the rule conditions. Alternatively, you can click **Open** on the toolbar or click the rule name to open the Edit Rules page. • **Delete:** Select to delete the selected rule. Alternatively, you can click **Delete** on the toolbar. • **Refresh:** Click to refresh the list of identity rules in the Rules page. Alternatively, you can click **Refresh** on the toolbar.
View	Select one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Rule Name, Description, Status, Owner, Created Date, or Last Updated, of the identity rules table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Rules page in a separate window. • **Sort:** Select to sort the rules in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns. • **Query By Example:** Select to show or hide the Query By Example (QBE) fields in the Rules page.
Create	Click to open the Create Rule page where you can create identity audit rules.
Duplicate	Click to create a duplicate of the selected rule with a number appended to the rule name. You can modify the duplicated rule to create a new rule.
Open	Click to open the Edit Rules page that lets you modify any attributes in this page, add/modify/delete the rule conditions, or group/ungroup the rule conditions. Alternatively, you can select **Open** from the Actions menu, or click the rule name to open the Edit Rules page.
Delete	Click to delete the selected rule. Alternatively, you can select **Delete** from the Actions menu.
Refresh	Click to refresh the list of identity rules in the Rules page. Alternatively, you can select **Refresh** from the Actions menu.
	Click to show or hide the Query By Example (QBE) fields in the Rules page.
Detach	Click to detach the Rules page in a separate window.

Related Topics

Managing Identity Audit Rules in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Rule

Use the Create Rule page to create identity audit rules.

Section Title

Element	Description
Name	Enter a name of the rule. This is a mandatory field.
Description	Enter a description for the rule.
Owner	Click the search icon adjacent to the Owner box to open the Assign Owner dialog box, search and select a user, and click **Select** to assign the selected user as the owner of the rule.
Status	Verify that **Enabled** is selected in the Status list so that the rule you create is in enabled state. By default, rules are in enabled state. To disable the rule, you can select `Disabled` from the Status list.
Type	Indicates that the type of the rule is identity audit. This is a read-only field.
Group	Click to group together the selected lines of rule conditions.
Ungroup	Click to ungroup the selected lines of rule conditions.
Add Condition	Click to add a new line to the rule condition.
Remove	Click to remove the selected line from the rule condition.
	Click to open the Condition Builder dialog box that lets you build your condition. The Condition Builder dialog box enables you to search and navigate through all the attributes so that you can select them to include in your rule condition.
Operators list	Select an operator, such as EQUAL or AND, to specify the relation between the left hand side and right hand side in the line of rule condition.
Create	Click to create the rule and display it in the Rules page.
Cancel	Click Cancel to close the Create Rule page without creating the rule.

Related Topics

Creating Identity Audit Rules in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Policies Page

Use the Policies page to create and manage identity audit policies.

Search

The Search section of the Policies page lets you search for identity audit policies.

Element	Description
Search list	Select an attribute based on which you can search the policies. The attributes are Policy Name, Description, Last Updated, Remediator Login, and Status.
Search text box	Enter a value of the selected attribute as the search criterion.
Search icon	Click to perform the search and display the results in a tabular format.

Element	Description
Advanced	Click the Advanced link to display the advanced search options.

Advanced Search

The Advanced search section lets you search for identity audit policies based on detailed search criteria.

Element	Description
Match	Select any one of the following options: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Policy Name	Select a search condition, such as Starts with or Equals, and enter the name of the identity audit policy that you want to search.
Description	Select a search condition and enter a policy description that you want to search.
Last Updated	Select a search condition, such as On or before or Equals, click the Select Date icon to select a date when the policy is last updated, based on which you want to search the policy.
Remediator Login	Select a search condition and enter a remediator login name that you want to search.
Status	Select a search condition, such as Equals or Does not equal, and then select Enabled or Disabled to search policies with the selected status.
Search	Click to search the identity audit policies based on the values entered in the advanced search fields.
Reset	Click to reset the values of the advanced search fields.
Save	Click to save the search conditions for later reuse.
Add Fields	Click to display more field names. Select or deselect field name to add to or remove from advanced search.
Reorder	Click to open the Reorder Search Fields dialog box. Use the up and down arrow keys to reorder the search fields, and click OK.
Basic	Click to go back to simple search options.

Search Result

The search result section in the Policies page lets you open, create, and manage identity audit policies.

Element	Description
Actions	Select one of the following options from the Actions menu: • **Create:** Select to open the Create Policy page where you can create identity audit policies. • **Duplicate:** Select to create a duplicate of the selected policy with a number appended to the policy name. You can modify the duplicated policy to create a new policy. Alternatively, you can select the policy and click **Duplicate** on the toolbar. • **Open:** Select to open the Edit Policy page that lets you modify any attributes in this page, add/modify/delete the rules associated with the open policy. Alternatively, you can click **Open** on the toolbar or click the policy name to open the Edit Policy page. • **Delete:** Select to delete the selected policy. Alternatively, you can click **Delete** on the toolbar. • **Preview:** Select to preview results of the IDA policies to understand the policy violations that will be generated as a result of a scan. When you preview a policy, the policy violations are displayed, but the violations are not assigned to the remediators. • **View Scans:** Select to display the Scans page with the results of the scan. The scan name, status of the scan, start time, end time, the number of users scanned, and number of violations are displayed in a table. • **Refresh:** Select to refresh the list of identity audit policies in the Policies page. Alternatively, you can click **Refresh** on the toolbar.
View	Select one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Policy Name, Description, Remediator Name, Status, Owner, Created Date, or Last Updated, of the identity policies table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Policies page in a separate window. • **Sort:** Select to sort the policies in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns. • **Query By Example:** Select to show or hide the Query By Example (QBE) fields in the Rules page.
Create	Click to open the Create Policy page where you can create identity audit policies.
Duplicate	Click to create a duplicate of the selected policy with a number appended to the policy name. You can modify the duplicated policy to create a new policy. Alternatively, you can select the policy name and select **Duplicate** from the Actions menu.
Open	Click to open the Edit Policy page that lets you modify any attributes in this page, add/modify/delete the rules associated with the open policy. Alternatively, you can select **Open** from the Actions menu or click the policy name to open the Edit Policy page.
Delete	Click to delete the selected policy. Alternatively, you can select the policy and select **Delete** from the Actions menu.
Preview	Click to preview the results of the IDA policies to understand the policy violations that will be generated as a result of a scan. When you preview a policy, the policy violations are displayed, but the violations are not assigned to the remediators.

Element	Description
View Scans	Click to display the Scans page with the results of the scan. The scan name, status of the scan, start time, end time, the number of users scanned, and number of violations are displayed in a table.
Refresh	Click to refresh the list of identity audit policies in the Policies page. Alternatively, you can select **Refresh** from the Actions menu.
	Click to show or hide the Query By Example (QBE) fields in the Policies page.
Detach	Click to detach the Rules page in a separate window.

Related Topics

Managing Identity Audit Policies in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Policy

Use the Create Policy page to create identity audit policies.

Policy Attributes

Element	Description
Name	Enter the identity audit policy name. This is a mandatory field.
Description	Enter a description for the identity audit policy.
Status	Select Enabled or Disabled status of the identity audit policy. The status is Enabled by default.
Owner	Select the identity audit policy owner, which is the display name of the policy owner. Click the search icon adjacent to this field to search and select a policy owner.
Type	The policy type is Identity Audit by default. This value cannot be modified because only policies of type Identity Audit can be created from the Create Policies page.
Severity	Select a severity level, such as High, Medium, or Low, which will be associated with the policy violations generated by this policy.
Evaluate during Requests	Select to display the policy violation during user's access request. User can either cancel the request or submit the request with violation.
Workflow Name	Select the workflow name that will be invoked during a user's access, if you select the **Evaluate during Requests** option. By default, the `default/Identity/AuditRemediation` workflow is selected.
Remediator	Select any one of the following remediators for violations generated by the policy: • **User:** Select to specify a user as the remediator. Search and select the user by clicking the Search icon. • **Manager:** Select if you want the manager of the user for whom the violation is generated to be the remediator. • **Role:** Select to specify the members of a certain role to be the remediator. Search and select the role by clicking the Search icon.

Element	Description
Create	Click to create the identity audit policy, which is listed in the Policies page.
Cancel	Click to close the Create Policy page without saving the details of the identity audit policy.

Rules

Element	Description
View	Select one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Rule Name, Description, Status, Owner, Created Date, or Updated Date, of the identity rules table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the rules section of the Create Policy page in a separate window. • **Sort:** Select to sort the rules in ascending or descending orders. Select Advanced to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Add	Click to display the Add Rule dialog box that lets you search and add identity audit rules to the policy. In the Add Rule dialog box, select a rule attribute name from the search list, enter a search criterion on the search field, and click the Search icon. The rules that match the search criterion are listed in the Results table. Select one or more rules that you want to add to the policy, and click **Add Selected**. To select all rules, you can click **Add All**. The selected rules are added in the Selected Rules table. Then click **Select** to add the selected rules to the table in the Rules section. Optionally, to remove any rule from the table in the Rules section, select the rule, and click **Remove**.
Remove	Click to remove the selected identity audit rule from the policy.
Detach	Click to detach the rules section of the Create Policy page in a separate window.

Related Topics

Creating Identity Audit Policies in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Preview Policy

Use the Preview Policy page to select a set of users that you want to scan.

Base Selection

Use the Base Selection section to specify the strategy to determine which users get scanned.

Element	Description
All Organizations	Select to specify that all organizations will be scanned.
Selected Organizations	Select to specify one or more organizations that will be scanned. After selecting this option, click Add Organizations, search and select one or more organizations, and then click Select.
All Users	Select to specify that all users will be scanned.
User Criteria	Select to display the User Criteria section where you can specify criteria parameters so that users that match the criteria will be scanned.
Selected Users	Select to specify one or more users that will be scanned. After selecting this option, click **Add Users**, search and select one or more users, and then click **Select**.
Submit	Click to submit the scan.
Cancel	Click to close the Base Selection page without submitting the scan.

User Criteria

Use the User Criteria section, which is displayed only on selecting User Criteria as the base selection, to specify criteria parameters for the users to be scanned, and to preview the results of the scan.

Element	Description
Match	Select any one of the following options: • **All:** To specify that all the parameters must match. • **Any:** To specify that any one parameter must match.
Manager	Enter manager name of the user.
Organization	Enter the organization name of the user.
Advanced	(Optional) Click to include more attributes to the user criteria.
Saved Search	Select any one of the following options: • SanDef User Criteria: • Search User: • Personalize:
Update and Preview Results	Click to display the specified criteria in the Criteria String section and display the users that match the specified user criteria.
Reset	Click to reset the values of the criteria parameters.
Save	Click to display the Create Saved Search dialog box that lets you save the specified criteria parameters for future reuse. This dialog box contains the following options: • **Name:** Enter the name of the saved search. • **Set as default:** Select to specify that the saved search is the default search. • **Run automatically:** Select to specify if you want to run the saved search each time the User Criteria is selected as the base selection. • **OK:** Click to save the criteria parameters as the saved search and close the Create Saved Search dialog box. • **Cancel:** Click to close the Create Saved Search dialog box without saving the user criteria.

Related Topics

Creating Scan Definitions in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Scan Definitions Page

Use the Scan Definitions page to create and manage scan definitions.

Basic Search

The Basic Search section of the Scan Definitions page lets you search for scan definitions.

Element	Description
Search list	Select an attribute based on which you can search the scan definitions.
Search text box	Enter a value of the selected attribute as the search criterion.
Search icon	Click to perform the search and display the results in a tabular format.
Advanced	Click the Advanced link to display the advanced search options.

Advanced Search

The Advanced search section lets you search for scan definitions based on detailed search criteria.

Element	Description
Match	Select any one of the following options: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Scan Definition Name	Select a search condition, such as Starts with or Equals, and enter the name of the scan definition that you want to search.
Description	Select a search condition and enter the description of a scan definition that you want to search.
Owner	Select a search condition and enter the login name of the owner of the scan definition that you want to search.
Last Updated	Select a search condition, such as On or before or Equals, click the Select Date icon to select a date when the scan definition is last updated, based on which you want to search the scan definition.
Search	Click to search the scan definitions based on the values entered in the advanced search fields.
Reset	Click to reset the values of the advanced search fields.
Save	Click to save the search conditions for later reuse.
Add Fields	Click to display more field names. Select or deselect field name to add to or remove from advanced search.
Reorder	Click to open the Reorder Search Fields dialog box. Use the up and down arrow keys to reorder the search fields, and click **OK**.
Basic	Click to go back to basic search options.

Search Result

The search result section in the Scan Definitions page lets you open, create, and manage scan definitions.

Element	Description
Actions	Select one of the following options from the Actions menu: • **Create:** Select to open the Create Scan Definitions wizard for creating a new scan definition. • **Open:** Select to open the details of a selected scan definition. • **View Scan:** Select to open the Scans page that displays the results of the scan. • **Refresh:** Select to refresh the list of scan definitions in the Scan Definitions page.
View	The View menu provides the following options: • **Columns:** Select to display the options to show or hide columns, such as Name, or Description, of the scan definitions table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Scan Definitions page in a separate window. • **Sort:** Select to sort the scan definitions in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns. • **Query By Example:** Select to show or hide the Query By Example (QBE) fields in the Scan Definitions page.
Create	Click to open the Create Scan Definitions wizard for creating a new scan definition.
Open	Click to open the details of a selected scan definition.
Refresh	Click to refresh the list of scan definitions in the Scan Definitions page.
	Click to show or hide the Query By Example (QBE) fields in the Scan Definitions page.
Detach	Click to detach the Scan Definitions page in a separate window.
Page	Displays and lets you select and enter the page number.

Related Topics

Managing Scan Definitions in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Create Scan Definitions

Use the Create Scan Definitions wizard to create new scan definitions.

Attributes

Use the Attributes page of the Create Scan Definitions wizard to specify general attributes for the scan definition.

Element	Description
Name	Enter a name for the scan definition. This is a mandatory field.
Description	Enter a description for the scan definition.
Owner	Specify the user name of the owner of the scan definition. You can click the Search icon, and search and select a user as the owner. This is a mandatory field.
Next	Click to go to the Select Policy page of the Create Scan Definitions wizard.
Cancel	Click to quit the Create Scan Definitions wizard without creating the scan definition.

Select Policy

Use the Select Policy page of the Create Scan Definitions wizard to specify a policy selection strategy for the scan definition.

Element	Description
Policy Selection Strategy	Select any one of the following: • **All Policies:** Select to associate all the IDA policies with the scan definition. • **Selected Policies:** Select to associate the policies you select to associate them with the scan definition. To do so, click **Add Policies**, and search and select a policy. • **Policy Criteria:** Select this option to specify criteria parameters based on which the policies will be dynamically associated with the scan definition. To do so, select one or more of the following options: – **All** or **Any:** To specify whether all parameters or any one parameter must match. – **Policy Name:** Enter a policy name that you want to specify as a criteria parameter. – **Description:** Enter a policy description that you want to specify as a criteria parameter. – **Advanced:** Optionally click to include more attributes in the criteria. – **Update and Preview Results:** Click to add the selected criteria to the Criteria String section.
Back	Click to go back to the Attributes page of the Create Scan Definitions wizard.
Next	Click to go to the Base Selection page of the Create Scan Definitions wizard.
Cancel	Click to quit the Create Scan Definitions wizard without creating the scan definition.

Base Selection

Use the Base Selection page of the Create Scan Definitions wizard to specify the users that you want to scan by using the scan definition.

Element	Description
All Organizations	Select to specify that all organizations will be scanned.

Element	Description
Selected Organizations	Select to specify one or more organizations that will be scanned. After selecting this option, click **Add Organizations**, search and select one or more organizations, and then click **Select**.
All Users	Select to specify that all users will be scanned.
User Criteria	Select to specify criteria parameters so that users that match the criteria will be scanned. To do so, select one or more of the following options: • **All** or **Any:** To specify whether all parameters or any one parameter must match. • **Manager:** Enter the user name of a manager that you want to specify as a criteria parameter. • **Organization:** Enter the organization name that you want to specify as a criteria parameter. • **Advanced:** Optionally click to include more attributes in the criteria. • **Update and Preview Results:** Click to add the selected criteria to the Criteria String section.
Selected Users	Select to specify one or more users that will be scanned. After selecting this option, click **Add Users**, search and select one or more users, and then click **Select**.
Back	Click to go back to the Select Policy page of the Create Scan Definitions wizard.
Next	Click to go to the Configuration page of the Create Scan Definitions wizard.
Cancel	Click to quit the Create Scan Definitions wizard without creating the scan definition.

Configuration

Use the Configuration page of the Create Scan Definitions wizard to allow or prevent self remediation by the owner of the scan definition.

Element	Description
Prevent Self Remediation	(Optional) Select if you want to prevent the owner of the scan definition to take remediation action. Then you must specify a different user as the remediator by selecting any one of the following options from the Alternate remediator ID list: • **User Manager:** Select to specify the manager of the user for whom the policy violation has been detected as the remediator. • **Selected User:** Select to specify a user that you select as the remediator. To do so, click the Search icon, and search and select a user.
Back	Click to go back to the Base Selection page of the Create Scan Definitions wizard.
Next	Click to go to the Summary page of the Create Scan Definitions wizard.
Cancel	Click to quit the Create Scan Definitions wizard without creating the scan definition.

Summary

Use the Summary page of the Create Scan Definitions wizard to review the details of the scan definition.

Element	Description
Name	Verify the scan definition name.
Description	Verify the description of the scan definition.
Owner	Verify the owner of the scan definition.
Policy Selection Strategy	Verify the policy associated with the scan definition.
Base Selection	Verify the users that you want to scan by using the scan definition.
Prevent Self Remediation	Verify the self remediation by the owner of the scan definition.
Back	Click to go back to the Configuration page of the Create Scan Definitions wizard.
Finish	Click to create the scan definition.
Cancel	Click to quit the Create Scan Definitions wizard without creating the scan definition.

Related Topics

Creating Scan Definitions in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Scans

Use the Scans page to view the results of an identity audit policy violation scan.

Element	Description
Scan Name	Displays the name of the scan. Click the scan name to open the Policy Violations page.
Status	Displays the status of the scan.
Start time	Displays the time when the scan started.
End time	Displays the time when the scan ended.
Users scanned	Displays the number of users scanned.
Violations	Displays the number of violations detected by the scan.

Related Topics

Running and Viewing Scans in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Policy Violations Page

Use this page to view and take actions on the identity audit policy violations for administrative purpose.

Basic Search

The Basic Search section of the Policy Violations page lets you search for policy violations.

Element	Description
Search Policy Violations list	Select an attribute, Policy Name or Policy Description, based on which you want to search the policy violations.
Search text box	Enter a value of the selected attribute as the search criterion.
Search icon	Click to perform the search and display the results in a tabular format.
Advanced	Click the Advanced link to display the advanced search options.

Advanced Search

The Advanced search section lets you search for policy violations based on detailed search criteria.

Element	Description
Match	Select any one of the following options: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Policy Name	Select a search condition, such as Starts with or Equals, and enter a policy name that you want to search.
Policy Description	Select a search condition, and enter a policy description that you want to search.
Search	Click to search the policy violations based on the values entered in the advanced search fields.
Reset	Click to reset the values of the advanced search fields.
Save	Click to save the search conditions for later reuse.
Add Fields	Click to display more field names. Select or deselect field name to add to or remove from advanced search.
Reorder	Click to open the Reorder Search Fields dialog box. Use the up and down arrow keys to reorder the search fields, and click **OK**.
Basic	Click to go back to basic search options.

Search Result

The search result section in the Policy Violations page lets you view and take actions on the identity audit policy violations.

Element	Description
Actions	Select one of the following options from the Actions menu: • **Open:** Select to open the details of a selected identity audit policy. • **Close:** Select to close a selected policy violation. • **Complete:** Select to complete a selected policy violation. • **Assign:** Select to reassign a selected policy violation to another user. • **Refresh:** Select to refresh the list of policy violations in the Policy Violations page.

Element	Description
View	The View menu provides the following options: • **Columns:** Select to display the options to show or hide columns, such as Policy Name or Severity, of the policy violations table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Policy Violations page in a separate window. • **Sort:** Select to sort the certification definitions in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns. • **Query By Example:** Select to show or hide the Query By Example (QBE) fields in the Certification Definitions page.
Open	Click to open the details of a selected identity audit policy.
Close	Click to close a selected policy violation.
Complete	Click to complete a selected policy violation.
Assign	Click to reassign a selected policy violation to another user.
Refresh	Click to refresh the list of policy violations in the Policy Violations page.
	Click to show or hide the Query By Example (QBE) fields in the Policy Violations page.
Detach	Click to detach the Policy Violations page in a separate window.
Policy name link	Click to open the details of the policy violation in the Violation details page.

Related Topics

Managing Policy Violations in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Violation Details

Use the Violation Details page to view and take action on the policy violations, such as remediate, close, or complete the violation.

Details Tab

Use the Details tab of the Violation details page to view policy violation details, and view the causes of violations and take action on them.

Section	Element	Description
	Complete	Select a policy that you want to complete, and click **Complete** to complete the selected policy.
Violation Details		Displays the details of the policy violation, such as the policy attributes, status, detection count, and the user name for which the violation is generated.

Section	Element	Description
Access Details		Displays the cause of the violation, the rules that have been violated, the status and attributes of the violation, and comments, if any. Place your mouse pointer on the information icon in the Rules Violated column to display a popup with details of the violated rule, such as rule name, description, and rule condition.
	Actions	Select any one of the following options from the Actions menu: • **Request for Remediation:** Select to remediate the cause of the violation. Depending on the actor selected to remediate, such as user, manager, or role, the policy violation cause is assigned to them. • **Close as Fixed:** Select to close the violation cause as fixed. The Provide Comments dialog box is displayed. Enter a comment, and click **Submit**. • **Close as Risk Accepted:** Select to close the policy violation cause by accepting the violation risk. The Provide Comments dialog box is displayed. In the Expiration Date field, specify a date after which the violation will be re-opened if it still exists. In the Comments field, enter a comment, and click **Submit**.
	Remediate	Click to remediate the cause of the violation. Depending on the actor selected to remediate, such as user, manager, or role, the policy violation cause is assigned to them.
	Close	Click and select any one of the following: • **Close as Fixed:** Select to close the violation cause as fixed. The Provide Comments dialog box is displayed. Enter a comment, and click **Submit**. • **Close as Risk Accepted:** Select to close the policy violation cause by accepting the violation risk. The Provide Comments dialog box is displayed. In the Expiration Date field, specify a date after which the violation will be re-opened if it still exists. In the Comments field, enter a comment, and click **Submit**.

Action History Tab

Use the Action History tab of the Violation details page to view all actions on the open policy till the current date.

Related Topics

Opening Policy Violation Details in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

5
Customize

Use the customization mode to customize the Identity Self Service interface.

Element	Description
	Click to open the Page Properties dialog box that lets you add a page parameter. This dialog box consists of the following options: • **Add a page parameter:** Click to open the Add a Page Parameter dialog box. In the Name box, enter a page parameter name, and click **Add Parameter** to add the parameter to the UI. Otherwise, click **Cancel** to close the Add a Page Parameter dialog box without adding the page parameter. • **OK:** Click to add the page parameter and close the Page Properties dialog box. • **Cancel:** Click to close the Page Properties dialog box without adding the page parameter.
Add Content	Click to display the design view of the customization mode.
Structure	Click to display the structure view of the customization mode.
Close	Click to close the customization mode.

Structure

Use the Structure tab to display the component tree that contains all the ADF components of the page you want to customize.

Element	Description
	Click to add content to a selected component. Clicking this icon opens the Add Content dialog box.
	Click to open the Component Properties dialog box that you can use to specify the properties of a selected component.
	Click to delete a selected component.
	Click to cut a selected component.
	Click to paste a component that is cut in the component structure. Clicking the down arrow key displays the following options: • **Paste Before:** Select to paste the component before the selected component. • **Paste Into:** Select to paste the component into the selected component. • **Paste After:** Select to paste the component after the selected component.
»	Click the overflow icon to display more options on the component structure pane.
Reset Task Flow	Click to remove all edits and restore the task flow fragment to its original state.

Element	Description
Dock	Click and select one of the **Top**, **Bottom**, **Right**, and **Left** options to dock the component structure.
Hide Structure / Show Structure	Click the toggle between displaying or hiding the component structure.

Add Content

Use this dialog box to navigate to and add ADF components for customizing the UI.

Element	Description
	Click to move one level up in the component navigation from inside a component folder. When inside a component folder, click the down arrow to display a list of folders including Top, which is the root of the component navigation, and select any folder to navigate to.
Search box	Enter a component name that you want to search.
	Click to search the component and display it in the Add Content dialog box.
	Click to refresh the list of components and component folders in the Add Content dialog box.
Close	Click to close the Add Content dialog box.
Open	Click to open the component folder.
Add	Click to add the component to the selected panel.

Component Properties

Use this dialog box to view and specify the properties of the selected ADF component. The options in this dialog box are displayed based on the type of selected component.

Element	Description
Display Options	Click to specify options related to the display of the selected UI region. For example, you can specify static text or image to be displayed in a selected region, or you can use the Expression Builder to specify an expression based on which the element will be shown dynamically. Click the down arrow with each option and select the options to open the Expression Builder, reset the value of the property, or override the value of the property.
Child Components	Click to specify options about the child components of the selected UI region. Select or deselect the checkbox corresponding to the attributes to show or hide the attributes respectively. Click the up and down arrows corresponding to move the attributes up or down respectively.
Style	Click to specify style-related options, such as font or width, for the selected UI region.
Content Style	Click to specify style-related options for the contents of the selected UI region.
Apply	Click to apply the options selected in the Component Properties dialog box.
OK	Click to close the Component Properties dialog box by applying the changes.

Element	Description
Cancel	Click to close the Component Properties dialog box without applying the changes.

Related Topics

Customizing the Interface in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

6
Inbox

The Inbox page allows you to filter task views into user preferences, such as assigned tasks, completed tasks, and tasks for which information has been requested. It also allows the user to search tasks, organize them in views, and create shared views.

Element	Description
Inbox	**My Task:** Click to view the list of tasks assigned to you.
Views	Lists the different user views.
Right Panel	The right panel displays the View options and the items displayed depends on the view that is selected.
	Click to create a new view. Create User View window is displayed.
	Click to edit inbox settings. Edit Inbox Settings window is displayed.
	Click to delete the selected view.

Create User View

Element	Description
Definition	
Name	Click  to select the public view.
Assignee	Select the assignee for the view.
Match	Select the match criteria. Click  to add conditions. Select the condition and enter value. Click  to remove the condition.
Share View	Select if the view can be shared, options are: • **Definition only:** Select to share only view definition. • **Data:** Select to share view data.
Users	Click  to open the Identity Browser to select the user.
Groups	Click  to open the Identity Browser to select the group.

Element	Description
Display	
Select View Columns	Select the columns that should be part of the view. Select the attributes from **Available** list and move it to the **Selected** list.
Sort by	Select the sort by option.
Then by	Select the sort then by option.
Sort Order	Select the sort order option.
OK	Click **OK** to submit the selections.
Cancel	Click to cancel the changes made to the page.

Edit Inbox Settings

Elements	Description
Show Column	Select the columns that should be part of the view. Select the attributes from **Available** list and move it to the **Selected** list.
Sort By	Select the sort by option.
Then By	Select the sort then by option.
Sort Order	Select the sort order option.
Number of tasks per fetch	Enter the number of tasks that needs to be fetched each time.
Show Task count for Views	Select if task count has to be displayed.
Hide Task Details Panel	Select to hide details panel.
Display task details in	Select the where to display the tasks: • **External Window:** Select to display tasks in an external window. • **Same Window:** Select to display tasks in the same window.
Default View	Select the default view from the list, for example Inbox, Views, My Views or Shared Views.
OK	Click **OK** to submit the selections.
Cancel	Click to cancel the changes made to the page.

Related Topics

Using the Unified Inbox in *Oracle Fusion Middleware Performing Self Service Tasks with Oracle Identity Governance*

Part II

Identity System Administration

7

Identity System Administration Home

- Identity System Administration
- Sign In

Identity System Administration

Use the Identity System Administration to perform system administration tasks in Oracle Identity Manager, such as define workflow policies, home organization policies, and user capabilities, manage the schema of system entities, such as user, role, and organization, manage provisioning end-points and the schema of the supported objects, import/export Oracle Identity Manager configuration objects, and install/uninstall/upgrade connectors.

Top Pane

Use the links in the top pane to manage accessibility and sandboxes, access Oracle Identity Manager Help, and sign out from Identity System Administration.

Element	Description
Accessibility	Click to display the Accessibility dialog box that lets you select if you want to use a screen reader, use high contrast colors, and large fonts.
Sandboxes	Click to open the Manage Sandboxes page that lets you create, activate, deactivate, delete, publish, and import and export sandboxes.
Help	Click to open the Oracle Help for the Web page where you can search and view help topics for Identity System Administration pages.
Sign Out	Click to sign out of Identity System Administration.

Left Pane

Use the links in the left pane to open the corresponding details in the right pane for various system administration tasks, such as managing policies, provisioning configuration, system entities, system configuration, upgrade, and workflows.

Section	Element	Description
Policies	Approval Policies	Click to open the Approval Policies tab of the Policies page to create and manage approval policies if you have upgraded Oracle Identity Manager from an earlier release. An approval policy helps to associate request types with approval processes defined in the workflow service.
Provisioning Configuration	Reconciliation	Click to open the Reconciliation tab of the Event Management page to create and manage reconciliation events.
	Form Designer	Click to open the Form Designer page to create and manage forms of type users, roles, organizations, catalog, and resources that are not predefined in Oracle Identity Manager.

Section	Element	Description
	IT Resource	Click to open the Manage IT Resource page to create and manage IT resources. An IT resource is composed of parameters that store connection information about a target system. Oracle Identity Manager uses this information to connect to a specific installation or instance of the target system.
	Generic Connector	Click to open the Manage Connectors page to create and manage generic connectors, which are basic connectors without advanced features.
	Application Instances	Click to open the Application Instances page to create and manage application instances. An application instance is a combination of an IT resource instance and resource object. Users have accounts and entitlements that are associated with application instance and not with the IT resource instance or resource object.
	Manage Connector	Click to open the Connector Management page to define, install, clone, upgrade, and uninstall predefined connectors in an Oracle Identity Manager environment. A predefined connector is designed for commonly used target systems, such as Microsoft Active Directory and PeopleSoft Enterprise Applications.
System Entities	User	Click to open the Manage User page to customize the User form, such as to create a User Defined Field (UDF) for the user entity.
	Organization	Click to open the Manage Organization page to customize the Organization form, such as to create a UDF for the organization entity.
	Role	Click to open the Manage Role page to customize the Role form, such as to create a UDF for the role entity.
	Catalog	Click to open the Manage Catalog page to customize the Catalog form, such as to create a UDF for the catalog entity.
System Configuration	Home Organization Policy	Click to open the Home Organization Policy page to create and manage policies based on which the home organization of a user is determined at the time of self registration.
	Self Service Capabilities	Click to open the Self Service Capabilities page to define self service capability policies to control what operations a user can perform for self.
	Lookups	Click to open the Search and Select: Lookup Type page to create and manage lookup definitions.
	Role Categories	Click to open the Role Categories page to create and manage role categories for categorizing roles for the purpose of navigation and authorization.
	Scheduler	Click to open the Scheduler tab of the System Management page to create and manage scheduled jobs.
	Notification	Click to open the Notification tab of the System Management page to create and manage notification templates.
	Configuration Properties	Click to open the System Configuration tab of the System Management page to create and manage system properties, which define the characteristics that control the behavior of Oracle Identity Manager.

Section	Element	Description
	Export	Click to open the Export Configuration page to export Oracle Identity Manager configurations by using the Deployment Manager.
	Import	Click to open the Import Configuration page to import Oracle Identity Manager configurations by using the Deployment Manager.
Upgrade	Upgrade User Form	Click to open the Upgrade User Form to create and manage custom form fields for the user entity.
	Upgrade Role Form	Click to open the Upgrade Role Form to create and manage custom form fields for the role entity.
	Upgrade Organization Form	Click to open the Upgrade Organization Form to create and manage custom form fields for the organization entity.
	Upgrade Application Instances	Click to open the Upgrade form to create and manage custom form fields for the application instance entity.
Workflows	Approval	Click to open the Approval Workflow Rules page to manage approval workflow rules that determines whether or not request approval is required for an operation and which workflow is invoked for a specific operation.

Sign In

The login page allows you to log in to Oracle Identity System Administration.

Element	Description
User ID	Enter the User id of the user who has to log in.
Password	Enter the password of the user who has to log in.
Sign in	Click **Sign-in** to log into Identity System Administration Console.

Related Topics

Logging in to Oracle Identity System Administration in the *Oracle Fusion Middleware Administering Oracle Identity Governance*

8

Policies

- Approval Policies

Approval Policies

Use the Approval Policies page to create and manage approval policies in an upgraded deployment of Oracle Identity Manager.

> **Note:**
>
> Approval policies have been deprecated in favor of workflow policies. Request generation and approval is governed by workflow policies. However, if you have upgraded Oracle Identity Manager from an earlier release, then approval policies continue to work.

Search Approval Policies

Use this section of the Approval Policies page to search for approval policies.

Element	Description
Search Approval Policies	Enter a search criterion to search for approval policies. You can specify the asterisk (*) wildcard character to specify the search criterion.
	Click to display a list of approval policies in a search results table.
Advanced Search	Click to display the Advanced Search: Approval Policies page that you can use to search for approval policies based on advanced search criteria.
Actions	Select one of the following options from the Actions menu: • **Create:** Selecting this option displays a message stating that creating approval policy is not allowed. • **Delete:** Select to delete the selected approval policy. Alternatively, click on the toolbar to delete the approval policy. • **Open:** Select to open the Approval Policy Details page with the approval policy attributes. Alternatively, click on the toolbar to open the Approval Policy Details page. • **Set Priority:** Select to open the Modify Approval Policy Priority wizard that lets you modify the priority of the selected approval policy.

Element	Description
View	Select the following option from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Unnamed Column, of the search results table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden.
	Clicking this icon displays a message stating that creating approval policy is not allowed.
	Click to delete the selected approval policy. Alternatively, select **Delete** from the Actions menu.
	Click to open the Approval Policy Details page with the approval policy attributes. Alternatively, select **Open** from the Actions menu.
	Click to display the full search results table in the Advanced Search: Approval Policies page.

Advanced Search: Approval Policies

Use this section of the Approval Policies page to search for approval policies based on advanced search criteria.

Element	Description
Match	Select any one of the following: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Policy Name	Enter a name of the approval policy.
Request Type	Enter the name of the request type associated with the approval policy.
Level	Enter the approval level.
Scope Type	Select Organization, Role, or Application Instance.
Scope	Enter the associated application instance, organization, or role name. The scope is populated only for the approval policies associated with the operation level request.
Search	Click to display a list of approval policies in a search results table.
Reset	Click to reset the values in the advanced search fields.
Add Fields	Click to display fields that you can add or remove from the advanced search.
Actions	Select one of the following options from the Actions menu: • **Create:** Selecting this option displays a message stating that creating approval policy is not allowed. • **Delete:** Select to delete the selected approval policy. • **Open:** Select to open the Approval Policy Details page with the approval policy attributes. • **Set Priority:** Select to open the Modify Approval Policy Priority wizard that lets you modify the priority of the selected approval policy.

Element	Description
View	Select the following option from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Unnamed Column, of the search results table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden.
Create	Clicking this button displays a message stating that creating approval policy is not allowed.
Delete	Click to delete the selected approval policy.
Open	Click to open the Approval Policy Details page with the approval policy attributes.

Approval Policy Details

Use this page to view the details of an approval policy and modify the approval policy.

Element	Description
Approval Rules	Use this section to modify approval policy rules, if required. To modify an approval policy rule, you can add a simple rule, add a rule container, modify rule components, or delete a rule component.
Actions	Select one of the following options from the Actions menu: • **Modify Rule Components:** Select to open the Modify Rule Components dialog box that lets you modify the selected rule component. Edit the values of the rule component, and click **Apply**. • **Delete Rule Components:** Select to delete a selected rule component. A message box is displayed asking for confirmation. Click **Yes** to confirm deletion.
Save	Click to save the changes in the approval policy.

Modify Approval Policy Priority

Use this wizard to change the priority of an approval policy.

Element	Description
Set Policy Details	This page contains the following fields: • **Request Type:** Select the request type by selecting from the LOV, for example, Assign Roles. This is a mandatory attribute. • **Level:** Select the approval level that you want to implement for this approval policy. This is a mandatory attribute. • **Scope Type:** Set automatically based on the request type selection. • **All Scope:** Select to specify the approval policy associated with all entities for a particular entity type. • **Scope:** Select to specify the approval policy associated with the specific entity for a particular entity type. An approval policy can be associated with a specific Scope based on the Scope Type. • **Cancel:** Click to exit the Modify Approval Policy Priority wizard without setting the priority of the selected approval policy. • **Next:** Click to go to the next page of the Modify Approval Policy Priority wizard.

Element	Description
Set Policy Priorities	Enter a number to specify the priority of the approval policy. Then, click **Next** to go to the next page of the Modify Approval Policy Priority wizard. Alternatively, click **Back** to go back to the previous screen of the Modify Approval Policy Priority wizard, or click **Cancel** to exit the Modify Approval Policy Priority wizard without setting the priority of the selected approval policy.
Review	This page displays the policy name and the priority that you set for your review. Click one of the following: • **Back:** Click to go back to the previous screen of the Modify Approval Policy Priority wizard. • **Cancel:** Click to exit the Modify Approval Policy Priority wizard without setting the priority of the selected approval policy. • **Finish:** Click to set the new priority for the selected approval policy. A message is displayed stating the approval policy priority has been changed successfully. Click **OK**.

9 Provisioning Configuration

Provisioning configuration includes creating and managing reconciliation events, forms, IT resources, Generic Technology Connectors (GTC), application instances, and connector lifecycle. These tasks are performed in the Provisioning Configuration section of the Oracle Identity System Administration.

The Provisioning Configuration section consists of the following pages:

- Event Management
- Form Designer
- Create Form
- Manage Form
- Manage IT Resource
- Create IT Resource
- View IT Resource Details and Parameters
- IT Resource Administrative Roles
- Edit IT Resource Details and Parameters
- Create Generic Technology Connector
- Manage Connectors
- Application Instances
- Create Application Instance
- Application Instance Details
- Connector Management
- Install Connector
- Connector Management Defining
- Connector Management - Cloning
- Connector Management - Upgrading

Event Management

Use the Event Management tab to manage reconciliation events.

Search Reconciliation Events

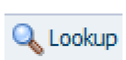
Use the Search Reconciliation Events section to search reconciliation events and take actions on them.

Element	Description
Search Reconciliation Events field	Enter a search criteria to search reconciliation events based on event ID, event status, change type, entity type, recon key field, or profile name.
	Click to search the events that match your search criteria and display them in the search results table.
Advanced Search	Click to open the Advanced Search: Events page.
Actions	Select one of the following from the Actions menu: • **Lookup:** Select to display the details of a selected event in the Event Details page. • **Close Event:** Select to close the selected event or events. The Close Event dialog box is displayed. In the Justification box, enter a reason to close the event, and then click **Close**. • **Reevaluate Event:** Select to re-evaluate the selected event or events. The Reevaluate Event dialog box is displayed with the event IDs that you have selected. Click **Reevaluate**.
View	Select one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Event ID, Profile Name, Event Batch ID, and Key Fields, of the search results table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort:** Select to sort the certification definitions in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options.
	Click to display the details of a selected event in the Event Details page.
	Click to display the full search results table in the Advanced Search: Events page.
	Click the up and down arrow keys in the Event ID column to sort the event IDs in ascending and descending orders respectively.
Event ID	Click the event ID link to display the details of the event in the Event Details page.

Advanced Search: Events

Use the Advanced Search: Events page to search reconciliation events based on detailed search criteria and take action on them.

Element	Description
Match	Select any one of the following options: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Event ID	Select a search condition, such as Equals or Greater than, and enter the event ID that you want to search.
Event Batch ID	Select a search condition, such as Equals or Greater than, and enter the event batch ID that you want to search.

Element	Description
Resource Name	Select a search condition, such as Contains or Equals, and enter the resource name that you want to search.
Current Status	Select a search condition, such as Equals or Does not equal, and select a status from the list that you want to search.
Type	Select a search condition, such as Equals or Does not equal, and select a reconciliation type from the list that you want to search.
Profile Name	Select a search condition, such as Contains or Equals, and enter the reconciliation profile name that you want to search.
Entity	Select a search condition, such as Equals or Does not equal, and select an entity type from the list that you want to search.
Search	Click to search the event IDs based on the values entered in the advanced search fields.
Reset	Click to reset the values of the advanced search fields.
Add Fields	Click to display more field names. Select or deselect field name to add to or remove from advanced search.
Actions	Select one of the following options from the Actions menu: • **Lookup:** Select to display the details of a selected event in the Event Details page. • **Close Event:** Select to close the selected event or events. The Close Event dialog box is displayed. In the Justification box, enter a reason to close the event, and then click **Close**. • **Reevaluate Event:** Select to re-evaluate the selected event or events. The Reevaluate Event dialog box is displayed with the event IDs that you have selected. Click **Reevaluate**.
View	Select one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Event ID, Profile Name, Event Batch ID, and Key Fields, of the search results table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort:** Select to sort the certification definitions in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
	Click to display the details of a selected event in the Event Details page.
	Click the up and down arrow keys in the Event ID column to sort the event IDs in ascending and descending orders respectively.
Event ID	Click the event ID link to display the details of the event in the Event Details page.

Event Details

Use the Event Details page to display the details of a selected reconciliation event. The fields in this page change dynamically based on the event type and event status.

Element	Description
Reevaluate Event	Click to re-evaluate the open event. The Reevaluate Event dialog box is displayed with the event ID. Click **Reevaluate**.
Close Event	Click to close the open event. The Close Event dialog box is displayed. In the Justification box, enter a reason to close the event, and then click **Close**.
Ad Hoc Link	Click to link the open event to any user or role. The Ad Hoc Link dialog box is displayed. Click the lookup icon, and perform a user search. Select a user from the search result, and click **Link**.
Refresh	Click to refresh the event details displayed in the page.
Event section	Displays the information about the event, such as event ID, whether the event type is User or Account, the time when the event was created, the reconciliation run ID, resource name, the profile name, and the key field values.
Linked To section	Displays that the event is linked to a user or account. It displays the user or account ID to which the event is linked, the account description (if any), and the type of linking, such as rule-based linking or manual linking.
Notes	Displays the notes that the reconciliation engine has added where appropriate. This is a read-only field and is blank if no notes are attached to the event.
Reconciliation Data tab	Displays the reconciliation event data. This shows the attribute name, attribute value, and Oracle Identity Manager mapped field. It also shows the child data of the event, if any. The reconciliation data displays the last name, first name, hiring date, user ID, and the IT resource name.
Matched Accounts tab	Displays the accounts that are matched.
Matched Users tab	Displays the user matches found by the reconciliation engine. For a multiple match, the linked user is not shown in this table.
History tab	Displays the operations that took place for this event from event creation and data validation to account matching and whether the update was successful.
Actions	Depending upon on the event type and event status, select the following option from the Actions menu: **Link:** Select to manually select any match out of all the matches found by the reconciliation engine.
View	The view menu is available in all the tabs of the Event Details page. It provides one or more of the following options: • **Columns:** Select to display the options to show or hide columns of the table in the active tab. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.

Related Topics

Managing Reconciliation Events in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Displaying Event Details in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Form Designer

Use the Form Designer page to create and manage application instance forms.

Search Forms

Use the Search Forms section to search for forms associated with resource objects.

Element	Description
Resource Type	Enter the type of resource object to search for associated forms. You can click the lookup icon to open the Search and Select: Resource Type dialog box. In the Name field, enter the name of the resource object, and click **Search**. The resource objects that match the search criteria are displayed. Select a resource object, and click **OK**.
Saved Search	Select any one of the following options: • **Implicit Search:** Select to implicitly search for forms by specifying a resource type. • **Personalize:** Select to open the Personalized Saved Searches dialog box that lets you set options for the saved search for future reuse. This dialog box contains the following options: – **Saved Searches:** Implicit Search is selected by default, which you can either delete or duplicate. – **Delete:** Click to delete the implicit search. – **Duplicate:** Click to duplicate the implicit search. On clicking this button, the **Run Automatically** and **Show in search list** are available for selection. – **Set as default:** Select to set the current search as the default search. – **Run automatically:** Select to automatically run the saved search every time you open the Form Designer page. – **Show in search list:** Select to display the saved search in the Saved Search list. – **Apply:** Click to apply the options selected in the Personalized Saved Searches dialog box. – **OK:** Click to close the Personalized Saved Searches dialog box by applying the selected options. – **Close:** Click to close the Personalized Saved Searches dialog box without applying the selected options.
Search	Click to search the forms that match the specified search condition and display the results in the Search Results section.
Reset	Click to reset the search options in the Search Forms section.
Save	Click to open the Create Saved Search dialog box that lets you save the search conditions specified in the Search Forms section. This dialog box has the following options: • **Name:** Enter the name of the saved search. • **Set as default:** Select to set the saved search as the default search. • **Run automatically:** Select to automatically run the saved search every time you open the Form Designer page.

Search Results

Use the Search Results section to create forms and open forms for modification.

Element	Description
Actions	Select one of the following options from the Actions menu: • **Create:** Select to open the Create Form page that lets you create a form. Alternatively, click **Create** on the toolbar to open the Create Form page. Before selecting this option, create and activate a sandbox. A warning message is displayed if no sandbox is activated. • **Open:** Select to open the Manage Form page that lets you modify the attributes of the form. Alternatively, click **Open** on the toolbar. Before selecting this option, create and activate a sandbox. A warning message is displayed if no sandbox is activated.
View	Select one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Form Name, Type, and Resource Type, of the search results table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Search Results section in a separate window. • **Sort:** Select to sort the fields in the search results table in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Create	Click to open the Create Form page that lets you create a form. Alternatively, select **Create** from the Actions menu to open the Create Form page. Before selecting this option, create and activate a sandbox. A warning message is displayed if no sandbox is activated.
Open	Click to open the Manage Form page that lets you modify the attributes of the form. Alternatively, select **Open** from the Actions menu. Before selecting this option, create and activate a sandbox. A warning message is displayed if no sandbox is activated.

Related Topics

Managing Forms in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Create Form

Use the Create Form page to create a new application instance form.

New form for

Use this section to specify the form attributes including the associated resource object type.

Element	Description
Resource Type	Enter a resource object with which you want to associate the form. Alternatively, you can click the lookup icon to open the Search and Select: Resource Type dialog box that lets you search and select a resource object. In the Name field, enter the name of the resource object you want to search, and click **Search**. The resource objects that match the search condition are displayed. Select the resource object that you want to associate with the form, and click **OK**.
Form Name	Enter a name for the new form you want to create.
Form Type	Select any one of the following: • **Parent Form + Child Tables (Master/Detail):** Select to generate the appropriate account form. The account form includes all multi-valued attributes irrespective of whether the forms represent an entitlement or not. • **Parent Form (Master):** Select to generate the appropriate account form. The account form does not include any multi-valued attributes. • **Parent Form + Child Tables for Non Entitlement (Master/Detail):** Select to generate the appropriate account form. The account form includes all multi-valued attributes that do not represent an entitlement. **Note:** Some or all of the Form Type options are displayed depending on the selected resource object type.
Generate Entitlement Forms	Select to generate the appropriate Entitlement forms. The entitlement form is generated only if the multi-valued attribute that represent an entitlement is complex. If the multi-valued attribute that represent an entitlement is scalar, then no form is generated.
Create	Click to create the form. A message is displayed stating that the form is created.

Available form fields

Use this section to display a list of form field names that are available for the form you are creating, and to specify whether or not you want to make each form field available for updating the entities in bulk.

Element	Description
View	Select any one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Display Name, Name, Description, and Bulk Update, of the search results table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Available form fields section in a separate window. • **Sort:** Select to sort the form fields in the Available form fields table in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Detach	Click to detach the Available form fields section in a separate window.
Bulk Update	Select for each form field in the Available form fields section to make the form field available for updating the entities in bulk.

Related Topics

Creating Forms By Using the Form Designer in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Managing Sandboxes in *Oracle Fusion Middleware Developing and Customizing Applications for Oracle Identity Governance*

Manage Form

Use the Mange Form page to display form attributes, modify the standard fields, and create or modify custom fields.

Element	Description
Regenerate View	Click to open the Regenerate View dialog box that lets you regenerate the form to allow users to provide additional information that might help the approver during the approval process. The Regenerate View dialog box provides the following options: • **Parent Form + Child Tables (Master/Detail):** Select to generate the appropriate account form. The account form includes all multi-valued attributes irrespective of whether the forms represent an entitlement or not. • **Parent Form (Master):** Select to generate the appropriate account form. The account form does not include any multi-valued attributes. • **Parent Form + Child Tables for Non Entitlement (Master/Detail):** Select to generate the appropriate account form. The account form includes all multi-valued attributes that do not represent an entitlement. • **Generate Entitlement Forms:** Select to generate the appropriate Entitlement forms. The entitlement form is generated only if the multi-valued attribute that represent an entitlement is complex. If the multi-valued attribute that represent an entitlement is scalar, then no form is generated. • **OK:** Click to close the Regenerate View dialog box by applying the selected options. • **Cancel:** Click to close the Regenerate View dialog box without applying the selected options.
Import/Export	Click to open the Import/Export field dialog box that lets you import and export fields to and from environments.

Fields

Use this tab to create and manage form fields.

Element	Description
Action	Select one of the following options from the Action menu: • **Create:** Select to open the Select Field Type dialog box that lets you select a type for the field you want to create. Select a field type, such as **Text**, **Number**, **Checkbox**, **Date**, or **Lookup**, and click **OK**. Depending on the selected field type, the page for creating custom field is displayed. • **Edit:** Select to edit the selected field. Depending on the type of selected field, the page for editing custom field is displayed. • **Refresh:** Click to refresh the list of fields in the fields table.
View	Select one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Display Label and Name, of the fields table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort:** Select to sort the fields in the search results table in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.

Element	Description
	Click to open the Select Field Type dialog box that lets you select a type for the field you want to create. Select a field type, such as **Text**, **Number**, **Checkbox**, **Date**, or **Lookup**, and click **OK**. Depending on the selected field type, the page for creating custom field is displayed.
	Select to edit the selected field. Depending on the type of selected field, the page for editing custom field is displayed.
	Select to refresh the list of fields in the fields table.
	Click to group selected fields, or to manage groups of fields. If you click this icon by selecting one or more fields, then enter a new group name, select a group name from the drop down that appears, and click the Apply group on selected rows icon. Selecting <Ungroup> from the list, ungroups the fields in the specified group. If you click this icon without selecting any fields, then select one of the following options for managing group labels: • **Create new group:** Select to create a group with two or more fields. Enter a group name, and click the Create icon to save the group. • **Delete group:** Select to delete a group. Select the group name you want to delete, and then click the Delete icon. • **Rename group:** Select to rename a group. Select the group name you want to rename in the From list, enter the new group name in the To box, and click **Rename**.
Search list	Select a field attribute by which you want to search one or more fields.
Search text box	Enter a field name that you want to search.
	Click to search the fields and display them in the fields table.
Show	Click and select one or more filters for displaying the fields in the fields table based on the state of the fields.
	Click in the Actions column for a particular field, and select one of the following options: • **Edit Field:** Select to open the edit field page depending on the field type and modify the field. • **Deprecate:** Select to deprecate the field so that it is no longer in use.

Child Objects

Use this tab to view and add child objects to form fields.

Element	Description
View	Select one of the following options from the View menu: • Columns: Select to display the options to show or hide columns, such as Name and Description, of the child objects table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the child objects table in a separate window. • **Sort:** Select to sort the child objects in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Add	Click to open the Create New Child Object dialog box that lets you create child object for the open form. In the Name field, enter a unique name of the child object that you want to create. In the Description filed, optionally enter a description for the child object, and click **OK**.
Detach	Click to detach the child objects table in a separate window.

Related Topics

Modifying Forms By Using the Form Designer in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Manage IT Resource

Use the Manage IT Resource page to search and create IT resources.

Element	Description
IT Resource Name	Enter the IT resource that you want to search.
IT Resource Type	Select an IT resource type that you want to search.
Search	Click to search the IT resources that match the conditions you specified in the IT Resource Name and IT Resource Type fields and display them in a tabular format.
Create IT Resource	Click to open the Create IT Resource wizard that lets you create a new IT resource.
Clear	Click to clear the values specified in the fields of the Manage IT Resource page.
IT Resource Name link	Click the IT resource name to open the details of the IT resource in the View IT Resource Details and Parameters page.
	Click to open the Edit IT Resource Details and Parameters page that lets you modify the attributes and parameters of the IT resource.
	Click to delete the IT resource. A Confirmation page is displayed. Click **Confirm Delete** to delete the IT resource. Otherwise, click **Cancel** to go back to the Manage IT Resource page without deleting the IT resource.
First	Click to navigate to the first page of the IT resources listed in the search results table.

Element	Description
Previous	Click to navigate to the previous page of the IT resources listed in the search results table.
Next	Click to navigate to the next page of the IT resources listed in the search results table.
Last	Click to navigate to the last page of the IT resources listed in the search results table.

Related Topics

Managing IT Resources in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Create IT Resource

Use the Create IT Resource wizard to create a new IT resource.

Step 1: Provide IT Resource Information

Use this page to specify basic attributes of the IT resource, such as IT resource name and type.

Element	Description
IT Resource Name	Enter the name of the IT resource that you want to create. This is a mandatory field.
IT Resource Type	Enter the IT resource type for the IT resource you want to create. This is a mandatory field. Alternatively, click the lookup icon to open the Select IT Resource Type popup that lets you filter and select the IT resource type. You can click **Clear** if you want to remove the value in the IT Resource Type field and specify a new one.
Remote Manager	Enter a remote manage name if you want to associate the IT resource with a particular remote manager. If you do not want to associate the IT resource with a remote manager, then leave this field blank. Alternatively, click the lookup icon to open the Select Remote Manager popup that lets you filter and select a remote manager. You can click **Clear** if you want to remove the value in the Remote Manager field.
Cancel	Click to cancel the IT resource creation. A confirmation message is displayed. Click **Yes** to confirm.
Continue	Click to go to the Step 2: Specify IT Resource Parameter Values page of the Create IT Resource wizard.

Step 2: Specify IT Resource Parameter Values

Use this page to specify values for the parameters of the IT resource.

Element	Description
Parameter fields	Specify values for the parameter fields of the IT resource. The parameters vary depending on the selected IT resource type.

Element	Description
Cancel	Click to cancel the IT resource creation. A confirmation message is displayed. Click **Yes** to confirm.
Back	Click to go back to the Step 1: Provide IT Resource Information page of the Create IT Resource wizard.
Continue	Click to go to the Step 3: Set Access Permission to IT Resource page of the Create IT Resource wizard.

Step 3: Set Access Permissions to IT Resource

Use this page to assign roles to the IT resource and set access permissions for the roles.

Element	Description
Assign Roles	Click to go to the Assign Roles page that lets you select and assign the administrative roles to the IT resource. For the roles that you want to assign to the IT resource, select the **Assign** checkbox and the access permissions that you want to set. For example, if you want to assign the ALL USERS role and set the Read and Write permissions to this role, then you must select the respective check boxes in the row, as well as the **Assign** checkbox, for this role. Then, click **Assign**.
Update Permissions	Click to go to the Update Permissions page that lets you set or remove specific access permissions for the administrative roles. Select or deselect the corresponding checkboxes access permissions depending on whether you want to set or remove specific access permissions for roles displayed on this page. Then, click **Update**. **Note:** You cannot modify the access permissions of the SYSTEM ADMINISTRATORS role. You can modify the access permissions of only other roles that you assign to the IT resource.
Unassign	Click to unassign a role from the IT resource. To do so, select the **Unassign** checkbox for the role that you want to unassign, and then click **Unassign**.
Cancel	Click to cancel the IT resource creation. A confirmation message is displayed. Click **Yes** to confirm.
Back	Click to go back to the Step 2: Specify IT Resource Parameter Values page of the Create IT Resource wizard.
Continue	Click to go to the Step 4: Verify IT Resource Details page of the Create IT Resource wizard.

Step 4: Verify IT Resource Details

Use this page to review the IT resource parameters and values, and the assigned administrative roles along with the access permissions.

Element	Description
Cancel	Click to cancel the IT resource creation. A confirmation message is displayed. Click **Yes** to confirm.
Back	Click to go back to the Step 3: Set Access Permission to IT Resource page of the Create IT Resource wizard.
Continue	Click to go to the Step 5: IT Resource Connection Result page of the Create IT Resource wizard.

Step 5: IT Resource Connection Result

Use this page to view the results of a connectivity test that is run using the IT resource information.

Element	Description
Cancel	Click to cancel the IT resource creation. A confirmation message is displayed. Click **Yes** to confirm.
Back	Click to go back to the Step 4: Verify IT Resource Details page of the Create IT Resource wizard.
Continue	This button is displayed if the connectivity test fails. Perform any one of the following: • Click Back to go the previous pages of the Create IT Resource wizard and modify the IT resource creation information. • Click to continue with the creation process if you want to fix the problem later and rerun the connectivity test. The Step 6: IT Resource Created page is displayed. Click **Finish** to create the IT resource.
Create	This button is displayed if the connectivity test is successful. Click to create the IT resource.

Related Topics

Create IT Resource in *Oracle Fusion Middleware Administering Oracle Identity Governance*

View IT Resource Details and Parameters

Use this page to view the details and parameters of the selected IT resource.

Element	Description
You can view additional information about this IT resource	Select any one of the following: • **Details and Parameters:** Select to display the details and parameters of the IT resource. • **Administrative Roles:** Select to modify the administrative roles assigned to the IT resource in the IT Resource Administrative Roles page.
Edit	Click to modify the details and parameters of the IT resource in the Edit IT Resource Details and Parameters page.
Back to Search Results	Click to navigate back to the search results of the Manage IT Resources page.

Related Topics

Viewing IT Resources in *Oracle Fusion Middleware Administering Oracle Identity Governance*

IT Resource Administrative Roles

Use this page to view the administrative roles and permissions assigned to the IT resource.

Element	Description
You can view additional information about this IT resource	Select any of the following: • **Administrative Roles:** Select to view and assign/unassign administrative roles for the IR resource. • **Details and Parameters:** Select to view the details and parameters of the IT resource in the View IT Resource Details and Parameters page.
Filter By Role Name	Enter the administrative role name that you want to filter and search.
Search Role	Click to search for the administrative role.
Unassign	Select the checkbox in the Unassign column for each administrative role that you want to unassign from the IT resource, and then click **Unassign**.
First	Click to go the first page of the administrative roles search result.
Previous	Click to go the previous page of the administrative roles search result.
Next	Click to go the next page of the administrative roles search result.
Last	Click to go the last page of the administrative roles search result.
Assign Role	Click to go to the Assign Roles page that lets you select and assign the administrative roles to the IT resource. For the roles that you want to assign to the IT resource, select the **Assign** checkbox and the access permissions that you want to set. For example, if you want to assign the ALL USERS role and set the Read and Write permissions to this role, then you must select the respective check boxes in the row, as well as the **Assign** checkbox, for this role. Then, click **Assign**.
Update Permissions	Click to go to the Update Permissions page that lets you set or remove specific access permissions for the administrative roles. Select or deselect the corresponding checkboxes access permissions depending on whether you want to set or remove specific access permissions for roles displayed on this page. Then, click **Update**. **Note:** You cannot modify the access permissions of the SYSTEM ADMINISTRATORS role. You can modify the access permissions of only other roles that you assign to the IT resource.
Back to Search Results	Click to navigate back to the search results in the Manage IT Resource page.

Related Topics

Viewing IT Resources in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Edit IT Resource Details and Parameters

Use this page to modify the details and parameters of the IT resource.

Element	Description
You can view additional information about this IT resource	Select any one of the following: • **Details and Parameters:** Select to view and edit the details and parameters of the IT resource. • **Administrative Roles:** Select to view and assign/unassign administrative roles and permissions for the IT resource.
Remote Manager	Enter a remote manage name if you want to associate the IT resource with a particular remote manager. If you do not want to associate the IT resource with a remote manager, then leave this field blank. Alternatively, click the lookup icon to open the Select Remote Manager popup that lets you filter and select a remote manager. You can click **Clear** if you want to remove the value in the Remote Manager field.
Parameter values	Edit the parameter values for the IT resource. The parameter values vary depending on the type of IT resource.
Update	Click to save the modifications in the IT resource parameters.
Cancel	Click to exit the IT resource modification without saving the changes. A confirmation message is displayed. Click **Yes** to confirm.
Back to Search Results	Click to navigate back to the search results in the Manage IT Resource page.

Related Topics

Modifying IT Resources in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Create Generic Technology Connector

Use the Create Generic Technology Connector wizard to create a new generic technology connector.

Step 1: Provide Basic Information

Use this page to provide basic information, such as name and providers, for the generic technology connector you want to create.

Element	Description
Name	Enter a name for the generic technology connector. This is a mandatory field.

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Reconciliation</td><td>Select if you want to use the generic technology connector for reconciliation, and then select one the following options:
Transport Provider: Select the reconciliation transport provider that you want to use for this connector. This list displays the predefined reconciliation transport providers and the reconciliation transport providers that you create.
Format Provider: Select the reconciliation format provider that you want to use for this connector. This list displays the predefined reconciliation format providers and the reconciliation format providers that you create.
Trusted Source Reconciliation: Select if you want to use the connector to perform trusted source reconciliation with the target system. If you select this check box, then the Provisioning region of the page is disabled. This is because you cannot provision to a target system that you designate as a trusted source. You can only reconcile data from a trusted source.</td></tr>
<tr><td>Provisioning</td><td>Select if you want to use the generic technology connector for provisioning, and then select one of the following options:
Transport Provider: Select the provisioning transport provider that you want to use for this connector. This list displays the predefined provisioning transport providers and the provisioning transport providers that you create.
Format Provider: Select the provisioning format provider that you want to use for this connector. This list displays the predefined provisioning format providers and the provisioning format providers that you create.</td></tr>
<tr><td>Exit</td><td>Click to exit the Create Generic Technology Connector wizard without creating the connector.</td></tr>
<tr><td>Continue</td><td>Click to go to the next page of the Create Generic Technology Connector wizard.</td></tr>
</table>

Step 2: Specify Parameter Values

Use this page to specify values for the parameters of the providers that you select on the Step 1: Provide Basic Information page.

This page provides the following options for creating a provisioning connector:

Element	Description
Run-time Parameters	Input variables of the providers that you select on the previous page. A run-time parameter represents a value that is not constrained by the design of the provider. For example, the location of the directories containing the data files that you want to reconcile is a run-time parameter.
Web Service URL	Enter the URL of the Web service that you want to use for sending a provisioning request to the target system.
Target ID	Enter a value that uniquely identifies the target system for provisioning operations.
User Name (authentication)	Enter the user name of the account required to connect to the target system (PST) through the Web service interface (PSP).
User Password (authentication)	Enter the password of the user account required to connect to the target system (PST) through the Web service interface (PSP).

Element	Description
Design Parameters	The parameters listed in this section are either design parameters of providers or reconciliation-specific parameters that are common to all generic technology connectors. A design parameter represents a value or set of values that is defined as part of the provider design.
Web Service SOAP Action	Enter the value of the `soapAction` attribute of the `operation` element in the WSDL file.
WSSE Configured for SPML Web Service?	Select if the Web service is configured to authenticate incoming requests by using WS-Security credentials.
Custom Authentication Credentials Namespace	Enter the name of the credentials namespace that you have defined for the Web service.
Custom Authentication Header Element	Enter the name of the element that will contain the credentials of the user account used to connect to the target system.
Custom Element to Store User Name	Enter the name of the element in the custom authentication section that will contain the user name you specify as the value of the User Name (authentication) parameter.
Custom Element to Store Password	Enter the name of the element in the custom authentication section that will contain the password you specify as the value of the User Password (authentication) parameter.
SPML Web Service Binding Style (DOCUMENT or RPC)	Enter the value of the `style` attribute of the `binding` element in the WSDL file.
SPML Web Service Complex Data Type	Enter the value of the `name` attribute of the `complexType` element in the WSDL file.
SPML Web Service Operation Name	Enter the value of the `name` attribute of the `operation` element in the WSDL file.
SPML Web Service Target Namespace	Enter the value of the `targetNamespace` attribute of the `definition` element in the WSDL file.
SPML Web Service Soap Message Body Prefix	Enter the name of the custom prefix element that contains the SOAP message body.
ID Attribute for Child Dataset Holding Role Membership Information	Enter the name of the unique identifier field for a provisioning staging child data set that holds group membership information.
Target Date Format	Enter the format in which you want to send date values to the target system during provisioning operations.
Exit	Click to exit the Create Generic Technology Connector wizard without creating the connector.
Back	Click to go back to the Step 1: Provide Basic Information page of the Create Generic Technology Connector wizard.
Continue	Click to go to the next page of the Create Generic Technology Connector wizard.

This page provides the following options for creating a reconciliation connector:

Element	Description
Run-Time Parameters	Input variables of the providers that you select on the previous page. A run-time parameter represents a value that is not constrained by the design of the provider. For example, the location of the directories containing the data files that you want to reconcile is a run-time parameter.
Staging Directory (Parent identity data)	Enter the path of the directory in which files containing parent data are stored. It is mandatory to specify a value for this parameter.
Staging Directory (Multivalued Identity data)	Enter the path of the directory in which files containing multivalued (or child) account or identity data (for example, role membership data) are stored.
Archiving Directory	Enter the path of the directory in which parent and child data files that have already been reconciled are to be stored.
File Prefix	Enter the prefix used to filter the names of files in the staging directories for both parent and child data files. During reconciliation, all files (in the staging directories) with names that start with the specified prefix are processed, regardless of the file extension.
Specified Delimiter	Enter the character that is used as the delimiter character in the parent and child data files. You can specify only a single character as the value of this parameter.
Tab Delimiter	Select to specify whether or not the file is delimited by tabs.
Fixed Column Width	Enter the width in characters of the data columns if the input file contains fixed-width data.
Unique Attribute (Parent Data)	Enter the field that is common to both the parent data and child data files for multivalued user data.
Design Parameters	The parameters listed in this section are either design parameters of providers or reconciliation-specific parameters that are common to all generic technology connectors. A design parameter represents a value or set of values that is defined as part of the provider design.
File Encoding	Enter the character set encoding used in the parent and data files.
Batch Size	Enter a batch size for the reconciliation run in order to break into batches the total number of records that the reconciliation engine fetches from the target system during each reconciliation run. The default value of this parameter is `All`.
Stop Reconciliation Threshold	Enter a value to automatically stop reconciliation if the percentage of records that fail the validation checks to the total number of reconciliation records processed exceeds the specified value.
Stop Threshold Minimum Records	Enter the number of records that must be processed by the validation provider before the Stop Reconciliation Threshold validation is enabled.
Source Date Format	Enter the format in which date values are stored in the target system. The format that you specify is used to validate date values fetched during reconciliation and to convert the date values to the format used internally by Oracle Identity Manager.
Reconcile Deletion of Multivalued Attribute Data	Select to specify whether or not you want to reconcile into Oracle Identity Manager the deletion of multivalued attribute data (child data) on the target system.
Reconciliation Type	Select **Full** or **Incremental** to specify whether you want the reconciliation engine to perform incremental or full reconciliation respectively.
Exit	Click to exit the Create Generic Technology Connector wizard without creating the connector.
Back	Click to go back to the Step 1: Provide Basic Information page of the Create Generic Technology Connector wizard.

Element	Description
Continue	Click to go to the next page of the Create Generic Technology Connector wizard.

Step 3: Modify Connector Configuration Page

Use this page to define data sets and mappings between the fields of the data sets. In other words, you use this page to specify the user data fields that you want to propagate from the target system to Oracle Identity Manager during reconciliation or to propagate from Oracle Identity Manager to the target system during provisioning.

Element	Description
	Click to add a field in a data set.
	Click to edit a field in a data set.
	To remove a field from a data set.
Close	To close the Step 3: Modify Connector Configuration Page of the Create Generic Technology Connector wizard.

Step 4: Verify Connector Form Names

Use this page to specify form names for the process forms corresponding to the OIM - Account data set and its child data sets.

Element	Description
OIM - Account	Displays default names for the process forms based on the names of the corresponding data sets. You must verify and, if required, change the names of these forms to ensure that they are unique for this installation of Oracle Identity Manager.
Exit	Click to exit the Create Generic Technology Connector wizard without creating the connector.
Back	Click to go back to the Step 3: Modify Connector Configuration Page of the Create Generic Technology Connector wizard.
Continue	Click to go to the next page of the Create Generic Technology Connector wizard.

Step 5: Verify Connector Information

Use this page to review information that you have provided up to this point for creating generic technology connectors.

Element	Description
Provide Basic Information	Click **View** to reopen and view the information provided on the Step 1: Provide Basic Information page. You cannot change the information displayed on this page, because any change in this information would amount to creating a new generic technology connector.
Specify Parameter Values	Click **Change** to reopen the Step 2: Specify Parameter Values page and modify the parameter values on this page.
Connector Configuration	Click **Change** to reopen the Step 3: Modify Connector Configuration page and add or edit fields and mappings.

Element	Description
Exit	Click to exit the Create Generic Technology Connector wizard without creating the connector.
Back	Click to go back to the Step 4: Verify Connector Form Names page of the Create Generic Technology Connector wizard.
Save	Click to create the generic technology connector.

Related Topics

Creating Generic Technology Connectors and Using Identity System Administration to Create the Connector in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Manage Connectors

Use the Manage Connectors page to search and create generic technology connectors (GTC).

Element	Description
Connector Name	Enter the connector name that you want to search.
Transport Provider (Provisioning)	Select the provisioning transport provider based on which you want to perform the connector search.
Format Provider (Provisioning)	Select the provisioning format provider based on which you want to perform the connector search.
Transport Provider (Reconciliation)	Select the reconciliation transport provider based on which you want to perform the connector search.
Format Provider (Reconciliation)	Select the reconciliation format provider based on which you want to perform the connector search.
Search Connectors	Click to search the connectors based on the specified search conditions.
Create	Click to open the Create Generic Technology Connector wizard that lets you create a new generic technology connector.
Clear	Click to clear the values from the fields in the Manage Connectors page.

Related Topics

Managing Generic Connectors in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Application Instances

Use the Application Instances page to create and manage application instances.

Search

Use this section to search application instances based on the search condition you specify.

Element	Description
Match	Select any one of the following options: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Resource Object	Select a search condition, such as Starts with or Contains, and enter the resource object name that is associated to the application instance you want to search.
Display Name	Select a search condition, such as Starts with or Contains, and enter the display name of the application instance that you want to search.
IT Resource Instance	Select a search condition, such as Starts with or Contains, and enter the IT resource instance name that is associated to the application instance you want to search.
Search	Click to search the application instances based on the values specified in the search fields and display the result in the Search Results section.
Reset	Click to reset the values of the search fields.
Save	Click to save the search conditions for later reuse.
Add Fields	Click to display more field names. Select or deselect field name to add to or remove from the search.
Reorder	Click to open the Reorder Search Fields dialog box. Use the up and down arrow keys to reorder the search fields, and click **OK**.
Saved Search	

Search Results

Use this section to view and take actions on application instances, such as create, modify, and delete.

Element	Description
Actions	Select any one of the following options from the Actions menu: • **Create:** Select to open the Create Application Instance page that lets you create a new application instance. Alternatively, click **Create** on the toolbar. • **Open:** Select to open the details of the selected application instance in a separate page. Alternatively, select an application instance, and click **Open** on the toolbar, or click an application instance display name. • **Delete:** Select to delete the selected application instance. Alternatively, select an application instance, and click **Delete** on the toolbar.

Element	Description
View	Select any one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Display Name or Description, of the search results table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Scan Definitions page in a separate window. • **Sort:** Select to sort the certification definitions in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns. • **Query By Example:** Select to show or hide the Query By Example (QBE) fields in the search results table.
Create	Click to open the Create Application Instance page that lets you create a new application instance. Alternatively, select **Create** from the Actions menu.
Open	Click to open the details of the selected application instance in a separate page. Alternatively, select **Open** from the Actions menu, or click an application instance display name.
Delete	Click to delete the selected application instance. Alternatively, select an application instance, and select **Delete** from the Actions menu.
Refresh	Click to refresh the list of application instances in the search results table.
	Click to show or hide the Query By Example (QBE) fields in the search results table.
Detach	Click to detach the search results table in a separate window.

Related Topics

Managing Application Instances in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Create Application Instance

Use the Create Application Instance page to create a new application instance.

Element	Description
Name	Enter the name of the application instance. This is a required field.
Display Name	Enter the display name of the application instance. This is a required field.
Description	Enter a description of the application instance.
Disconnected	Select if you want to specify the application instance as disconnected. Selecting this option creates a new approval process that is assigned to the manual provisioning administrator.
Resource Object	Specify the resource object name. This is a mandatory field. You can click the search icon next to this field to search and select a resource object.

Element	Description
IT Resource Instance	Specify the IT resource instance name. This is a mandatory field. You can click the search icon next to this field to search and select an IT resource instance.
Form	Select the form or dataset name. The forms associated with the selected resource object are populated in the Forms list. Here, only pre-existing forms can be selected.
Parent AppInstance	Enter the application instance name that you want to specify as a parent to the new application instance. The new application instance inherits all the properties of the parent application instance. Resource must be assigned as 'Depends on' in the Design Console to populate this lookup.
Save	Click to create the application instance and display the details of the application instance in a page.
Cancel	Click to close the Create Application Instance page without creating the application instance.

Related Topics

Creating Application Instances in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Application Instance Details

Use the Application Instance details page to modify the application instance attributes and manage the organizations and entitlements associated with the application instance.

Attributes

Use this tab to modify the application instance attributes.

Element	Description
Name	Displays the application instance name. This field cannot be modified.
Display Name	Edit the display name of the application instance.
Description	Edit the description of the application instance.
Resource Object	Displays the resource object associated with the application instance. This field cannot be modified.
IT Resource Instance	Displays the IT resource instance associated with the application instance. This field cannot be modified.
Form	Select a pre-existing form that you want to associate with the selected resource object. Click **Edit** to open the Manage Form page that lets you modify the form. You can click **Refresh** to display the modified or newly selected form in the Form list.
Parent AppInstance	Edit the application instance name that you want to specify as a parent to the new application instance. Alternatively, you can click the lookup icon to search for and select a parent application instance.
Apply	Click to save and apply the attribute modifications.
Revert	Click to revert to the previous values for the fields in the Attributes tab.

Organizations

Use this tab to publish the application instance to organizations and revoke the organizations from the application instance.

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Actions</td><td>Select any one of the following options from the Actions menu:

Assign: Select to open the Select Organizations dialog box that lets you search and select the organization to which you want to publish to the open application instance. This dialog box provides the following options:

Search list: Select an organization attribute based on which you want to search for organizations.
Search text box: Enter the value of the selected organization attribute based on which you want to search for organizations.
Search icon: Click to search the organizations based on the specified search conditions and display the results in the Results table.
Add Selected: Click to add the selected organization to the Selected Organizations table.
Add All: Click to add all the organizations in the Results table to the Selected Organizations table.
Remove Selected: Click to remove the selected organization from the Selected Organizations table.
Remove All: Click to remove all the organizations listed in the Selected Organizations table.
Hierarchy: Select to publish the open application instance to the suborganizations of the selected organization. To publish the open application instance to the selected organizations only, leave this option deselected.
Apply to Entitlement: Select to publish the open application instance to the selected organizations with the entitlements associated with the application instance.
Select: Click to publish the application instance to the selected organizations.
Cancel: Click to close the Select Organizations dialog box without publishing the application instance to any organizations.

Revoke: Select to revoke the selected organization from the application instance. A confirmation box is displayed with the selected organization. Click Yes to confirm.
</td></tr>
<tr><td>View</td><td>Select any one of the following options from the View menu:

Columns: Select to display the options to show or hide columns, such as Organization Name or Type, of the organizations table. Select Show All to display all the columns. Select Manage Columns to open the Manage Columns dialog box where you can select the columns to be shown or hidden.
Detach: Select to detach the organizations table in a separate window.
Sort: Select to sort the organizations in ascending or descending orders.
Select Advanced to open the Advanced Sort window that lets you select advanced sort options.
Reorder Columns: Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Query By Example: Select to show or hide the Query By Example (QBE) fields in the organizations table.
</td></tr>
</table>

Element	Description
Assign	Click to open the Select Organizations dialog box that lets you search and select the organization to which you want to publish to the open application instance.
Revoke	Click to revoke the selected organization from the application instance.
Refresh	Click to refresh the list of organizations displayed in the organizations table.
	Click to show or hide the Query By Example (QBE) fields in the search results table.
Detach	Click to detach the organizations table in a separate window.
include sub-orgs	Displayed for the organizations for which you have selected the **Hierarchy** option in the Select Organizations dialog box. Deselect to revoke the application instance from the suborganizations of the organization to which the application instance is published.
Apply	This is disabled in the Organizations tab.
Revert	This is disabled in the Organizations tab.

Entitlements

Use this tab to modify the entitlements associated with the open application instance to change the entitlement attribute values, and to publish or revoke the entitlements to organizations.

Element	Description
Actions	Select the following option from the Actions menu: • **Edit:** Select to open the details of the selected entitlement in a page and edit the entitlement attributes.
View	Select any one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Display Name or Description, of the entitlements table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the entitlements table in a separate window. • **Sort:** Select to sort the entitlements in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns. • **Query By Example:** Select to show or hide the Query By Example (QBE) fields in the entitlements table.
Edit	Click to open the details of the selected entitlement in a page and edit the entitlement attributes.
Refresh	Click to refresh the list of entitlements displayed in the entitlements table.
	Click to show or hide the Query By Example (QBE) fields in the entitlements table.
Detach	Click to detach the entitlements table in a separate window.
Apply	This is disabled in the Entitlements tab.
Revert	This is disabled in the Entitlements tab.

Entitlement Details

Use this section to view the details of the entitlement that you select in the entitlements table, and to publish or revoke the entitlements to organizations.

Element	Description
Actions	Select any one of the following options: • **Assign:** Select to open the Select Organizations dialog box that lets you search and select the organization to which you want to publish to the selected entitlement. This dialog box provides the following options: – **Search list:** Select an organization attribute based on which you want to search for organizations. – **Search text box:** Enter the value of the selected organization attribute based on which you want to search for organizations. – **Search icon:** Click to search the organizations based on the specified search conditions and display the results in the Results table. – **Add Selected:** Click to add the selected organization to the Selected Organizations table. – **Add All:** Click to add all the organizations in the Results table to the Selected Organizations table. – **Remove Selected:** Click to remove the selected organization from the Selected Organizations table. – **Remove All:** Click to remove all the organizations listed in the Selected Organizations table. – **Hierarchy:** Select to publish the entitlement to the suborganizations of the selected organization. To publish the entitlement to the selected organizations only, leave this option deselected. – **Select:** Click to publish the entitlement to the selected organizations. – **Cancel:** Click to close the Select Organizations dialog box without publishing the entitlement to any organizations. • **Revoke:** Select to revoke the selected entitlement from the organization. A warning is displayed asking for confirmation. Click **Yes** to confirm.
include sub-orgs	Select if you want revoke the entitlement from the suborganizations of the organization.

Related Topics

Modifying Application Instances and Creating and Modifying Forms Associated With the Application Instances in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Connector Management

Use the Connector Management page to search, define, install/uninstall, upgrade, and clone connectors.

Element	Description
Connector Name	Enter the name of the connector that you want to search.

Element	Description
Search	Click to search the connectors and display the search results.
Clear	Click to clear the value in the Connector Name field.
Define	Click to open the Connector Management Defining wizard that lets you define a new connector.
Install	Click to open the Install Connector wizard that lets you install a connector.
Clone	Click open the Connector Management Cloning wizard that lets you clone a connector, which means creating a copy of a connector by setting new names for some of the objects that comprise the connector.
Upgrade icon	Click to open the Connector Management - Upgrading wizard that lets you upgrade an existing connector.
	Click to open or download the connector XML file.
	Click to export the silent upgrade XML file.
	Click to open the Connector Management - Upgrading wizard that lets you upgrade the connector.
	Click to open the Connector Management - Cloning wizard that lets you clone a connector, which means creating a copy of a connector by setting new names for some of the objects that comprise the connector.
First	Click to go to the first page of the connector search result.
Previous	Click to go to the previous page of the connector search result.
Next	Click to go to the next page of the connector search result.
Last	Click to go to the last page of the connector search result.

Related Topics

Managing Connector Lifecycle in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Install Connector

Use the Install Connector wizard to install a connector.

Step 1: Select Connector to Install

Use this page of the Install Connector wizard to select a connector that you want to install.

Element	Description
Connector List	Select the connector that you want to install from the list of names and release numbers of connectors whose installation files you would copy into the default connector installation directory.
Load	Click to load the connector that you selected from the Connector List and display the connector installation history and connector dependency details.
Alternative Directory	Enter the full path and name of the directory if you have copied the installation files into a different directory.
Refresh	Click to repopulate the list of connectors in the Connector List.
Cancel	Click to exit the Install Connector wizard without installing the connector.

Element	Description
Continue	Click to go to the Step 2: Connector Installation page of the Install Connector wizard.

Step 2: Connector Installation

Use this page to verify the connector installation and, if required, to retry the installation after making the required corrections.

Element	Description
Retry	Click to fix the cause of the error and then retry the installation. On successful completion of a task, a check mark is displayed for the task. If a task fails, then an X mark and a message stating the reason for failure are displayed. Depending on the reason for the failure, make the required correction and then either click **Retry** or cancel the installation and start from step 1 of the installation.
Exit	Click to exit the Install Connector wizard.

Related Topics

Installing Connectors in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Connector Management Defining

Use the Connector Management Defining wizard to define a connector.

Search

Use this page of the Connector Management Defining wizard to search for connector objects.

Element	Description
Name	Enter a search string and the asterisk (*) as a wildcard character to refine your search for the entity type that you select from the Type list, for example process forms, belonging to the connector.
Type	Select the entity type, for example process forms, which you want to search. Alternatively, select **All** to search for entities of all types.
	Click to display the list of entities that match the search criteria in the Available Entities list.
Refresh	Click to refresh the list of entities listed in the Available Entities list.
Available Entities	Displays the list of entities that match your search criteria and are available for selection. Select the checkbox for the entity to include it in the Selected Entities list. To select all entities from the Available Entities list, select the checkbox to the left of the Name column. You can select the number of rows displayed from the Rows Displayed list. By default, 10 rows are selected. If the Available Entities list spans across multiple pages, then you can use the page number links and the right and left arrows to navigate through the pages.

Element	Description
Selected Entities	Displays the list of selected entities for the connector definition. If you want to remove any selected entity, then click **Remove** adjacent to that entity in the Selected Entities list. You can select the number of rows displayed from the Rows Displayed list. By default, 10 rows are selected. If the Selected Entities list spans across multiple pages, then you can use the page number links and the right and left arrows to navigate through the pages.
Next	Click to go to the next page of the Connector Management Defining wizard.

Define Options

Use this page of the Connector Management Defining wizard to specify whether or not you want to define the connector with all dependencies.

Element	Description
Dependency	Select one of the following options: • **Yes:** Select to define the connector with all dependencies. • **No:** Select to define the connector without dependencies.
Next	Click to go to the next page of the Connector Management Defining wizard.
Back	Click to go to the previous page of the Connector Management Defining wizard.

Summary

Use this page of the Connector Management Defining wizard to review the selected connector objects and to subsequently define the connector.

Element	Description
Back	Click to go to the previous page of the Connector Management Defining wizard.
Define	Click to open the Define dialog box that lets you specify either an earlier version of the connector or a new connector for the connector definition. In this dialog box, select any one of the following options, and then click **Define**. • **Select the name of the connector, and then enter a release number for it:** Select if an earlier release of this connector already exists on this Oracle Identity Manager deployment. In addition, select a connector name and enter a release number. • **Enter the Name and release number for the connector:** Select if an earlier release of this connector does not exist on this Oracle Identity Manager deployment. In addition, enter a connector name and release number. **Define:** Click to define the connector in the system. At the end of the process, a message stating that the operation was successful is displayed.

Related Topics

Defining Connectors with Oracle Identity Governance in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Connector Management - Cloning

Use the Connector Management - Cloning wizard to clone a connector.

Step 1: XML Selection from File System

Use this page of the Connector Management - Cloning wizard to select the source XML file that you want to use to create the clone.

Element	Description
Browse	Click to navigate to and select the connector XML file that you want to use to create the clone.
Cancel	Click to exit the Connector Management - Cloning wizard without cloning the connector.
Continue	Click to go to the next page of the Connector Management - Cloning wizard.

Step 2: Provide New Names for Resource Objects

Use this page of the Connector Management - Cloning wizard to provide new names for the resource objects.

Element	Description
Existing Names	Displays the resource object names of the connector that you are cloning.
New Names	Enter the new names for the resource objects of the clone. If the connector has multiple resource objects, then the new name that you specify for each resource object must be different from the names of all the existing resource objects of that connector.
Cancel	Click to exit the Connector Management - Cloning wizard without cloning the connector.
Back	Click to go to the previous page of the Connector Management - Cloning wizard.
Continue	Click to go to the next page of the Connector Management - Cloning wizard.

Step 3: Provide New Names for Process Definitions

Use this page of the Connector Management - Cloning wizard to provide new names for the process definitions.

Element	Description
Existing Names	Displays the process definition names of the connector that you are cloning.
New Names	Enter new names for the process definitions of the clone. If the connector has multiple process definitions, then the new name that you specify for each process definition must be different from the names of all the existing process definitions of that connector.
Cancel	Click to exit the Connector Management - Cloning wizard without cloning the connector.

Element	Description
Back	Click to go to the previous page of the Connector Management - Cloning wizard.
Continue	Click to go to the next page of the Connector Management - Cloning wizard.

Step 4: Provide New Names for Process Forms

Use this page of the Connector Management - Cloning wizard to provide new names for the process forms.

Element	Description
Existing Names	Displays the process form names of the connector that you are cloning.
New Names	Enter new names for the process forms of the clone. If the connector has multiple process forms, then the new name that you specify for each process form must be different from the names of all the existing process forms of that connector.
Cancel	Click to exit the Connector Management - Cloning wizard without cloning the connector.
Back	Click to go to the previous page of the Connector Management - Cloning wizard.
Continue	Click to go to the next page of the Connector Management - Cloning wizard.

Step 5: Provide New Names for IT Resource Type Definitions

Use this page of the Connector Management - Cloning wizard to provide new names for the IT resource type definitions.

Element	Description
Existing Names	Displays the IT resource type definition names of the connector that you are cloning.
New Names	Enter new names for the IT resource type definitions of the clone. If the connector has multiple IT resource type definitions, then the new name that you specify for each IT resource type definition must be different from the names of all the existing IT resource type definitions of that connector.
Cancel	Click to exit the Connector Management -Cloning wizard without cloning the connector.
Back	Click to go to the previous page of the Connector Management - Cloning wizard.
Continue	Click to go to the next page of the Connector Management - Cloning wizard.

Step 6: Provide New Names for IT Resources

Use this page of the Connector Management - Cloning wizard to provide new names for the IT resources.

Element	Description
Existing Names	Displays the IT resource names of the connector that you are cloning.

Element	Description
New Names	Enter new names for the IT resources of the clone. If the connector has multiple IT resources, then the new name that you specify for each IT resource must be different from the names of all the existing IT resources of that connector.
Cancel	Click to exit the Connector Management - Cloning wizard without cloning the connector.
Back	Click to go to the previous page of the Connector Management - Cloning wizard.
Continue	Click to go to the next page of the Connector Management - Cloning wizard.

Step 7: Provide New Names for Scheduled Tasks

Use this page of the Connector Management - Cloning wizard to provide new names for scheduled tasks.

Element	Description
Existing Names	Displays the scheduled task names of the connector that you are cloning.
New Names	Enter new names for the scheduled tasks of the clone. You cannot use the same set of scheduled tasks for the clone and the original connector.
Cancel	Click to exit the Connector Management - Cloning wizard without cloning the connector.
Back	Click to go to the previous page of the Connector Management - Cloning wizard.
Continue	Click to go to the next page of the Connector Management - Cloning wizard.

Step 8: Provide New Names for Scheduled Jobs

Use this page of the Connector Management - Cloning wizard to provide new names for scheduled jobs.

Element	Description
Existing Names	Displays the scheduled job names of the connector that you are cloning.
New Names	Enter new names for the scheduled jobs of the clone.
Cancel	Click to exit the Connector Management - Cloning wizard without cloning the connector.
Back	Click to go to the previous page of the Connector Management - Cloning wizard.
Continue	Click to go to the next page of the Connector Management - Cloning wizard.

Step 9: Provide New Names for Lookup Type Definitions

Use this page of the Connector Management - Cloning wizard to provide new names for the lookup type definitions.

Element	Description
Existing Names	Displays the lookup type definition names of the connector that you are cloning.
New Names	Enter new names for the lookup definitions of the clone.
Cancel	Click to exit the Connector Management - Cloning wizard without cloning the connector.
Back	Click to go to the previous page of the Connector Management - Cloning wizard.
Continue	Click to go to the next page of the Connector Management - Cloning wizard.

Step 10: Provide a Prefix for Adapter Names

Use this page of the Connector Management - Cloning wizard to provide a prefix for the adapter names.

Element	Description
Prefix required field	Enter the string that is set as the prefix for the copies of the adapters.
Cancel	Click to exit the Connector Management - Cloning wizard without cloning the connector.
Back	Click to go to the previous page of the Connector Management - Cloning wizard.
Continue	Click to go to the next page of the Connector Management - Cloning wizard.

Step 11: Provide New Names for Reconciliation Rules

Use this page of the Connector Management - Cloning wizard to provide new names for reconciliation rules.

Element	Description
Existing Names	Displays the reconciliation rule names of the connector that you are cloning.
New Names	Enter new names for the reconciliation rules of the clone.
Cancel	Click to exit the Connector Management - Cloning wizard without cloning the connector.
Back	Click to go to the previous page of the Connector Management - Cloning wizard.
Continue	Click to go to the next page of the Connector Management - Cloning wizard.

Step 12: Object Names Summary

Use this page of the Connector Management - Cloning wizard to review the object names for the cloned connector.

Element	Description
Cancel	Click to exit the Connector Management - Cloning wizard without cloning the connector.

Element	Description
Back	Click to go to the previous page of the Connector Management - Cloning wizard.
Confirm	Click to confirm after you review the names that you have set for the connector objects of the clone.

Step 13: Object Clone Generation

Use this page to generate the XML file for the cloned connector.

Element	Description
Cancel	Click to exit the Connector Management - Cloning wizard without cloning the connector.
Generate XML	Click to generate the connector XML file of the clone. In the File Download dialog box, use the **Save** option to save the connector XML file of the clone to a location of your choice.

Related Topics

Cloning Connectors in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Connector Management - Upgrading

Use the Connector Management - Upgrading wizard to upgrade connectors.

Step 1: Select Connector XML to Upgrade

Use this page of the Connector Management — Upgrading wizard to specify the connector XML file to upgrade in wizard mode or silent mode.

Element	Description
Wizard Mode XML File	Use this field if you want to upgrade the connector in wizard mode. Click **Browse** to navigate to the target version of the connector XML to which you want to upgrade.
Silent Mode XML File	Use this field if you want to upgrade the connector in silent mode. Click **Browse** and navigate to the connector XML file for the source release in the silent mode upgrade XML field.
Cancel	Click to exit the Connector Management - Upgrading wizard without upgrading the connector.
Continue	Click to go to the next page of the Connector Management - Upgrading wizard.

Step 2: Resource Object Mapping

Use this page of the Connector Management — Upgrading wizard to map each new resource object with an existing resource object.

Element	Description
Existing Resource Objects	Select the resource object in the source release to which you want to map the resource object in the target release

Element	Description
New Resource Objects	Select None if there are new resource objects that do not have a corresponding resource object in the source release
Cancel	Click to exit the Connector Management - Upgrading wizard without upgrading the connector.
Back	Click to go to the previous page of the Connector Management - Upgrading wizard.
Continue	Click to go to the next page of the Connector Management - Upgrading wizard.

Step 3: Define Resource Scope

Use this page of the Connector Management — Upgrading wizard to review the resource object mappings for the connector.

Element	Description
New Resource Objects	Displays the new resource objects for the connector.
Existing Resource Objects	Displays the existing resource objects for the connector.
First	Click to go to the first page of the resource object mapping list.
Previous	Click to go to the previous page of the resource object mapping list.
Next	Click to go to the next page of the resource object mapping list.
Last	Click to go to the last page of the resource object mapping list.
Cancel	Click to exit the Connector Management - Upgrading wizard without upgrading the connector.
Back	Click to go to the previous page of the Connector Management - Upgrading wizard.
Continue	Click to go to the next page of the Connector Management - Upgrading wizard.

Step 4: Define Process Definition Mapping

Use this page of the Connector Management — Upgrading wizard to map each new process definition with an existing process definition.

Element	Description
New Process Definitions	Displays the new process definition that is mapped to the existing process definition.
Existing Process Definitions	Select the corresponding source process definition for a specified target process definition.
Process Task	Displays the list of process tasks available in the source process definition. Click **Retain** for the process task to retain that process task from the source process definition.
Retain	Click to retain the process tasks for which you selected **Retain** to retain the process tasks from the source process definition.
First	Click to go to the first page of the process tasks list.
Previous	Click to go to the previous page of the process tasks list.
Next	Click to go to the next page of the process tasks list.
Last	Click to go to the last page of the process tasks list.

Element	Description
Cancel	Click to exit the Connector Management - Upgrading wizard without upgrading the connector.
Back	Click to go to the previous page of the Connector Management - Upgrading wizard.
Continue	Click to go to the next page of the Connector Management - Upgrading wizard.

Step 5: Process Definition Mapping Summary

Use this page of the Connector Management — Upgrading wizard to review the summary of the process definition mappings that you create.

Element	Description
First	Click to go to the first page of the process definitions mapping list.
Previous	Click to go to the previous page of the process definitions mapping list.
Next	Click to go to the next page of the process definitions mapping list.
Last	Click to go to the last page of the process definitions mapping list.
Cancel	Click to exit the Connector Management - Upgrading wizard without upgrading the connector.
Back	Click to go to the previous page of the Connector Management - Upgrading wizard.
Continue	Click to go to the next page of the Connector Management - Upgrading wizard.

Step 6: Define Form Mappings

Use this page of the Connector Management — Upgrading wizard to map each new form with an existing form.

Element	Description
New Forms	Displays the new form that is mapped to the existing form.
Existing Forms	Select the source process form to display a list of process form fields from the source process form attributes.
Form Column Names	Displays the process form fields from the source process form attributes that are not available in the target process form. Click Selected for the attributes that are added as a part of customization.
Add	Click to add the attributes that you selected.
First	Click to go to the first page in the list of form attributes.
Previous	Click to go to the previous page in the list of form attributes.
Next	Click to go to the next page in the list of form attributes.
Last	Click to go to the last page in the list of form attributes.
Cancel	Click to exit the Connector Management - Upgrading wizard without upgrading the connector.
Back	Click to go to the previous page of the Connector Management - Upgrading wizard.
Continue	Click to go to the next page of the Connector Management - Upgrading wizard.

Step 7: Form Mapping Summary

Use this page of the Connector Management — Upgrading wizard to review the form mappings.

Element	Description
First	Click to go to the first page of the form mapping summary.
Previous	Click to go to the previous page of the form mapping summary.
Next	Click to go to the next page of the form mapping summary.
Last	Click to go to the last page of the form mapping summary.
Cancel	Click to exit the Connector Management - Upgrading wizard without upgrading the connector.
Back	Click to go to the previous page of the Connector Management - Upgrading wizard.
Continue	Click to go to the next page of the Connector Management - Upgrading wizard.

Step 8: Define IT Resource Type Definition Mappings

Use this page of the Connector Management — Upgrading wizard to map each new IT resource definition with an existing IT resource definition.

Element	Description
New IT Resource Type Definition	Displays the new IT resource type definition that is mapped with the existing IT resource type definition.
Existing IT Resource Type Definition	Select the corresponding source IT resource type definition.
IT Resource Type Definition Attributes	Displays a list of IT resource type definition parameters that are part of source definition but not available in the target definition. Select **Retain** for the parameters that are added as part of customization.
Retain	Click to retain the selected IT resource type definition parameters.
First	Click to go to the first page in the list of IT resource type definition parameters.
Previous	Click to go to the previous page in the list of IT resource type definition parameters.
Next	Click to go to the next page in the list of IT resource type definition parameters.
Last	Click to go to the last page in the list of IT resource type definition parameters.
Cancel	Click to exit the Connector Management - Upgrading wizard without upgrading the connector.
Back	Click to go to the previous page of the Connector Management - Upgrading wizard.
Continue	Click to go to the next page of the Connector Management - Upgrading wizard.

Step 9: IT Resource Type Definition Mapping Summary

Use this page of the Connector Management — Upgrading wizard to review the IT resource type definition mappings.

Element	Description
First	Click to go to the first page in the list of IT resource type definition mappings.
Previous	Click to go to the previous page in the list of IT resource type definition mappings.
Next	Click to go to the next page in the list of IT resource type definition mappings.
Last	Click to go to the last page in the list of IT resource type definition mappings.
Cancel	Click to exit the Connector Management - Upgrading wizard without upgrading the connector.
Back	Click to go to the previous page of the Connector Management - Upgrading wizard.
Continue	Click to go to the next page of the Connector Management - Upgrading wizard.

Step 12: Preupgrade Steps

Use this page of the Connector Management — Upgrading wizard to specify a new release number for the connector.

Element	Description
Connector Name	Displays the name of the connector that is being upgraded.
Connector Version	Enter a new release number for the upgraded connector.
Cancel	Click to exit the Connector Management - Upgrading wizard without upgrading the connector.
Back	Click to go to the previous page of the Connector Management - Upgrading wizard.
Continue	Click to go to the next page of the Connector Management - Upgrading wizard.

Step 13: Select Connector Objects to Be Upgraded

Use this page of the Connector Management - Upgrading wizard to review the connector objects that are being upgraded.

Element	Description
Entity Name	Display the entity names selected for the upgrade.
Entity Type	Displays the types of the entities selected for the upgrade.
First	Click to go to the first page in the list of connector objects selected for the upgrade.
Previous	Click to go to the previous page in the list of connector objects selected for the upgrade.
Next	Click to go to the next page in the list of connector objects selected for the upgrade.
Last	Click to go to the last page in the list of connector objects selected for the upgrade.
Back	Click to go to the previous page of the Connector Management - Upgrading wizard.
Exit	Click to exit the Connector Management - Upgrading wizard without upgrading the connector.

Element	Description
Upgrade	Click to upgrade the connector. The status of the upgrade is displayed in the Step 14: Connector Upgrade Status page of the Connector Management - Upgrading wizard.

Step 14: Connector Upgrade Status

Use this page of the Connector Management - Upgrading wizard to review the connector upgrade information.

Element	Description
Exit	Click to exit the Connector Management — Upgrading wizard.

Related Topics

Upgrading Connectors in *Oracle Fusion Middleware Administering Oracle Identity Governance*

10 System Entities

Manage System Entities

Use the Manage System Entities page to create, modify and view the system entities in the system.

Element	Description
Import/Export	Click to open the Import/Export User or Catalog window that lets you import or export user or catalog attributes. **Note:** This option is available when the System Entity type is User or Catalog.

Import/Export User/Catalog Window

Element	Description
Search text	Enter the search criteria.
Search	Click to search.
	Click to refresh the page.
Current Context: Layer Name	Select the current context layer name.
All Layers: Layer Name	Select all the layers.
Download Customizations for All Layers	Click to download the customization zip file.

Fields

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Action</td><td>Choose options from the menu to perform the following operations:

Create: Click to open the Select Field Type dialog box that lets you select a field type you want to create.
This dialog box consists of the following options:

Text: Select this option to create a text field.
Number: Select this option to create a numeric field.
Checkbox: Select this option to create a checkbox field.
Date: Select this option to create a date type field.
Lookup: Select this option to create a lookup field in which users can search and select the value.
OK: Click to create the field type you have selected.
Cancel: Click to close the page without changes.

Edit: Click to edit the selected custom attributes.
Refresh: Click to refresh the page.
</td></tr>
<tr><td>View</td><td>Choose commands from the View menu to control how the columns are displayed:

Columns: Select to display the options to show or hide columns, such as Display Label, Name, Type, Custom, Group, or Description. Select Show All to display all the columns. Select Manage Columns to open the Manage Columns dialog box where you can select the columns to be shown or hidden.
Sort

Ascending
Descending
Advanced

Sort By: Display Label, Name, Type, Custom, Group, or Description. Ascending or Descending.
Then By: Display Label, Name, Type, Custom, Group, or Description. Ascending or Descending.
Then By: Display Label, Name, Type, Custom, Group, or Description. Ascending or Descending.

Reorder Columns: Click to open a dialog box that lets you change the order of the table columns.
</td></tr>
</table>

Element	Description
	Click to create a new custom field.
	Click to edit the selected custom field.
	Click to refresh the page.
	Click and choose one of the following options: • **Create new group:** Click to create a new group. Enter the group name and click . • **Delete group:** Click to delete the group. • **Rename group:** Click to rename the group. Select the from group and enter the change **To** name.
Search list	Select one of the following search conditions: • **Name:** Select to search by name. • **Display Label:** Select to search by display label. • **Type:** Select to search by type. • **Description:** Select to search by description. • **Group:** Select to search by group.
Search text	Enter a value of the selected attribute as the search criterion.
	Click to perform the search and display the results in a tabular format.
Show	Choose options from the Show menu to: • **Standard and Custom:** Click to show standard and custom fields. • **Only Standard:** Click to show only standard fields. • **Only Custom:** Click to show only custom fields. • **Active and Deprecated:** Click to show active and deprecated fields. • **Only Active:** Click to show only active fields. • **Only Deprecated:** Click to show only deprecated fields.
	Click to edit standard field or set the field as deprecated.

Create System Entity

Use this page to create custom attributes for system entities. Depending on the type of attribute that you want to create, the fields on the Create Field page varies.

Element	Description
Save and Close	Click to save the user defined field and close this page.
Cancel	Click to close the page without saving the changes.

Element	Description
Appearance	Specify the following details: • **Display Label:** Enter the custom field label that is displayed in the form. • **Display Width:** Enter the display width in characters. • **Help Text:** Enter the field-level help text that is displayed to the users as a tooltip. **Note:** This option is displayed only for the Lookup field type.
Name	Specify the following details: • **Name:** Enter the unique custom field name. • **Description:** Enter description for the custom field.
Constraints	Specify the following details: • **Searchable:** Select if the attribute can be used to perform searches. • **Maximum Length:** Enter the maximum length of the field in characters. • **Depends On:** Select the fields whose data changes will cause this field's constraint expressions to be reevaluated. **Note:** This option is displayed only for the Lookup field type.

Element	Description
List of Values	**Note:** This option is displayed only for the Lookup field type. Specify the following details: • **Lookup Type:** Click to select an existing lookup type or click to create a new one. • **Constrain list by parent field value selection:** Select to set the parent dependency details. Select the required **Parent Choice List** and set the **Value Map**.
Default Value	Select the default value.
Advanced	Specify the following details: • **Searchable Picklist:** Select if the custom field is a input list of values. **Note:** This option is displayed only for the Lookup field type. • **Encrypt:** Select if the custom field must be encrypted. • **Certifiable:** Select if the attribute is certifiable. • **Use in Bulk:** Select if the attribute is available in bulk operations. • **LDAP Attribute:** Enter name of the attribute in the LDAP repository to which this custom attribute must map to.

Edit Field for a System Entity

Use this page to modify custom attributes for system entities. Depending on the type of attribute that you want to modify, the fields on the Edit Field page varies.

Element	Description
Save and Close	Click to save the modifications to the user defined field and close this page.
Cancel	Click to close the page without saving the changes.

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Appearance</td><td>Specify the following details:
Display Label: Enter the custom field label that is displayed in the form.
Display Width: Enter the display width in characters.
Help Text: Enter the field-level help text that is displayed to the users as a tooltip.
Note:
This option is displayed only for the Lookup field type.</td></tr>
<tr><td>Name</td><td>Specify the following details:
Name: Displays the unique custom field name.
Description: Enter description for the custom field.
API Name: Displays the API name.</td></tr>
<tr><td>Constraints</td><td>Specify the following details:
Searchable: Select if the attribute can be used to perform searches.
Maximum Length: Enter the maximum length of the field in characters.
Depends On: Select the fields whose data changes will cause this field's constraint expressions to be reevaluated.
Note:
This option is displayed only for the Lookup field type.</td></tr>
</table>

Element	Description
List of Values	**Note:** This option is displayed only for the Lookup field type. Specify the following details: • **Lookup Type:** Click to select a different lookup type. • **Constrain list by parent field value selection:** Select to set the parent dependency details. Select the required **Parent Choice List** and set the **Value Map**.
Default Value	Select the default value.
Advanced	Specify the following details: • **Searchable Picklist:** Select if the custom field is a input list of values. **Note:** This option is displayed only for the Lookup field type. • **Encrypt:** Select if the custom field must be encrypted. • **Certifiable:** Select if the attribute is certifiable. • **Use in Bulk:** Select if the attribute is available in bulk operations. • **LDAP Attribute:** Enter name of the attribute in the LDAP repository to which this custom attribute must map to.

Related Topics

Configuring Custom Attributes in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Creating a Custom Attribute in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Modifying a Custom Attribute in *Oracle Fusion Middleware Administering Oracle Identity Governance*

11 System Configuration

System configuration tasks include managing home organization policies, lookups, role categories, scheduled tasks, notifications, system properties, and the Deployment Manager. These tasks are performed in the System Configuration section of the Oracle Identity System Administration.

The System Configuration section consists of the following pages:

- Home Organization Policy
- Add Home Org Policy Rule
- Edit Home Org Policy Rule
- Self Service Capabilities
- Add Self Service Capability Policy Rule
- Edit Self Service Capability Policy Rule
- Lookups
- Create Lookup Type
- Edit Lookup Type
- Role Categories
- Create Role Category
- Open Role Category
- System Management - Notification
- System Management - Scheduler
- System Management - System Properties
- Import
- Export

Home Organization Policy

Elements	Description
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Click to open the table in a larger window. • **Reorder Column:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Create	Click to create a rule in home organization policy.
Open	Click to view and edit the details of the selected rule.
Delete	Click to delete the selected rule.
Refresh	Click to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.

Related Topics

Managing Home Organization Policy in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Add Home Org Policy Rule

You can create a rule in home organization policies by using the Add Home Org Policy page.

Elements	Description
Create	Click to create a rule in the home organization policy.
Cancel	Click to cancel the changes made to this page.

Create Rule

Elements	Description
Name	Enter the name of the rule.
Description	Enter the description for the rule.

Elements	Description
Owner	Enter the policy owner details. Click to search and select owner.
Status	Select the status of the rule. • **Enable:** Select to set the status of the rule as enable. • **Disable:** Select to set the status of the rule as disable. If the **Status** is set to **Disable** then when a user self registers, this rule is skipped during evaluation.
Type	Displays the type of policy.

Condition Builder

Elements	Description
Condition Builder	Select to set rule using Condition Builder. Condition builder panel is displayed where you can build a conditional expression.
Script	Select to set rule using a script. Editor panel is displayed where you can enter the groovy script.

Condition Builder Panel

Elements	Description
Group	Click to group the selected conditions.
Ungroup	Click to un-group the selected condition.
Add Condition	Click to add new condition row.
Remove	Click to delete a selected condition row.
	Click to open the Condition Builder dialog box that lets you add a condition. This dialog box consists of the following options: • **Search:** Enter a value for the search criterion and click • **Select a condition list:** Select a condition from the list. • **Value:** Select to provide a value for the condition. A list of value is displayed. • **Expression:** Select to build an expression for the condition. A list of condition is displayed. • **OK:** Click to submit the selection. • **Cancel:** Click to close the window without adding condition.

Script Panel

Elements	Description
Find	Enter the word you want to search and click .
Go to Line	Enter the line you want to move to and click .
Editor	Enter the script in the editor area.

Related Topics

Creating a Rule in Home Organization Policy in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Edit Home Org Policy Rule

You can modify a rule in home organization policies by using the Edit Home Org Policy page.

Elements	Description
Update	Click to modify the rule with the changes.
Revert	Click to close the page without making changes.

Edit Rule

Elements	Description
Name	Enter the name of the rule.
Description	Enter the description for the rule.
Owner	Enter the policy owner details. Click to search and select owner.
Status	Select the status of the rule. • **Enable:** Select to set the status of the rule as enable. • **Disable:** Select to set the status of the rule as disable. If the **Status** is set to **Disable** then when a user self registers, this rule is skipped during evaluation.
Type	Displays the type of policy.

Condition Builder

Elements	Description
Condition Builder	Select to set rule using Condition Builder. Condition builder panel is displayed where you can build a conditional expression.
Script	Select to set rule using a script. Editor panel is displayed where you can enter the groovy script.

Condition Builder Panel

Elements	Description
Group	Click to group the selected conditions.
Ungroup	Click to un-group the selected condition.
Add Condition	Click to add new condition row.
Remove	Click to delete a selected condition row.
	Click to open the Condition Builder dialog box that lets you add a condition. This dialog box consists of the following options: • **Search:** Enter a value for the search criterion and click  • **Select a condition list:** Select a condition from the list. • **Value:** Select to provide a value for the condition. A list of value is displayed. • **Expression:** Select to build an expression for the condition. A list of condition is displayed. • **OK:** Click to submit the selection. • **Cancel:** Click to close the window without adding condition.

Script Panel

Elements	Description
Find	Enter the word you want to search and click .
Go to Line	Enter the line you want to move to and click .
Editor	Enter the script in the editor area.

Related Topics

Modifying a Rule in Home Organization Policy in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Self Service Capabilities

Elements	Description
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Click to open the table in a larger window. • **Reorder Column:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Create	Click to create a rule in self service capabilities.
Open	Click to view and edit the details of the selected rule.
Delete	Click to delete the selected rule.
Refresh	Click to update the screen with any changes made on the (back-end) server.
Detach	Click to open the table in a larger window.

Related Topics

Managing Self Service Capability Policy in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Add Self Service Capability Policy Rule

Elements	Description
Create	Click to create a rule in self service capabilities.
Cancel	Click to cancel the changes made to this page.

Create Rule

Elements	Description
Name	Enter the name of the rule.
Description	Enter the description of the rule.

Elements	Description
Owner	Enter the rule owner details. Click  to search and select owner.
Status	Select the status of the rule. • **Enabled:** Select to set the status of the rule as enabled. • **Disabled:** Select to set the status of the rule as disabled. If Status is set to Disabled, then when a user is created, this rule is skipped during evaluation.
Type	Displays the type of policy.

Condition Builder

Use the condition builder to set rule.

Elements	Description
Group	Click to group the selected conditions.
Ungroup	Click to un-group the selected condition.
Add Condition	Click to add new condition row.
Remove	Click to delete a selected condition row.
	Click to open the Condition Builder dialog box that lets you add a condition. This dialog box consists of the following options: • **Search:** Enter a value for the search criterion and click  • **Select a condition list:** Select a condition from the list. • **Value:** Select to provide a value for the condition. A list of value is displayed. • **Expression:** Select to build an expression for the condition. A list of condition is displayed. • **OK:** Click to submit the selection. • **Cancel:** Click to close the window without adding condition.
	Click to add a new condition row.
	Click to remove the selected row.

Related Topics

Creating a Rule in Self Service Capability Policy in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Edit Self Service Capability Policy Rule

Use the Edit Self Service Capability page you can modify a rule in self service capabilities.

Elements	Description
Update	Click to modify the rule with the changes.
Revert	Click to close the page without making changes.

Edit Rule

Elements	Description
Name	Enter the name of the rule.
Description	Enter the description for the rule.
Owner	Enter the policy owner details. Click to search and select owner.
Status	Select the status of the rule. • **Enable**: Select to set the status of the rule as enable. • **Disable**: Select to set the status of the rule as disable. If the **Status** is set to **Disable** then when a user self registers, this rule is skipped during evaluation.
Type	Displays the type of policy.

Condition Builder

Elements	Description
Group	Click to group the selected conditions.
Ungroup	Click to un-group the selected condition.
Add Condition	Click to add new condition row.
Remove	Click to delete a selected condition row.

Elements	Description
	Click to open the Condition Builder dialog box that lets you add a condition. This dialog box consists of the following options: • **Search**: Enter a value for the search criterion and click  • **Select a condition list:** Select a condition from the list. • **Value:** Select to provide a value for the condition. A list of value is displayed. • **Expression:** Select to build an expression for the condition. A list of condition is displayed. • **OK:** Click to submit the selection. • **Cancel:** Click to close the window without adding condition.
	Click to add a new condition row.
	Click to remove the selected row.

Related Topics

Modifying a Rule in Self Service Capability Policy in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Lookups

Search

Use the Lookups page to search for a lookup type.

Element	Description
Match	Select any one of the following options: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Meaning	Enter the humanly readable description of the lookup value you want to search.
Code	Enter the Code value of the lookup type that you want to search.
Description	Enter a description of the lookup type.
Search	Click **Search** to search for the lookup types that match your search criteria.
Reset	Click to reset the values of the advanced search fields.

Search Result

Element	Description
Action	Choose options from the menu to perform the following operations: • **Create:** Click to open the Create Lookup Type page that lets you create a new lookup type. • **Edit:** Click to open the Edit Lookup Type page that lets you modify the selected lookup type.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Select to display the options to show or hide columns of the lookup details table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort** – Ascending – Descending – Advanced * **Sort By:** Meaning, Code, or Description. Ascending or Descending. * **Then By:** Meaning, Code, or Description. Ascending or Descending. * **Then By:** Meaning, Code, or Description. Ascending or Descending. • **Reorder Columns:** Click to open a dialog box that lets you change the order of the table columns.
	Click to create a new lookup type. The Create Lookup Type page is displayed.
	Click to modify the selected lookup. The Edit Lookup Type page is displayed.

Lookup Value Table

This table displays the details of the selected lookup type.

Related Topics

Managing Lookups in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Create Lookup Type

Use the Create Lookup Type page to create a lookup type.

Element	Description
Meaning	Enter the humanly readable description of the lookup type.
Code	Enter the Code value of the lookup type.
Description	Enter a description of the lookup type.

Lookup Codes

Element	Description
Action	Choose options from the menu to perform the following operations: • **Create:** Click to create lookup code. • **Delete:** Click to delete the selected code.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Select to display the options to show or hide columns of the lookup details table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort** – Ascending – Descending – Advanced * **Sort By:** Meaning or Code. Ascending or Descending. * **Then By:** Meaning or Code. Ascending or Descending. • **Reorder Columns:** Click to open a dialog box that lets you change the order of the table columns.
	Click to add the following lookup code details: • **Meaning:** Enter the meaning of the code. • **Code:** Enter the code.
	Click to delete the selected code.
Save	Click to create the lookup type.
Cancel	Click to close the page without making any changes.

Related Topics

Creating a Lookup Type in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Edit Lookup Type

Use the Edit Lookup Type page to modify a lookup type.

Element	Description
Meaning	Enter the humanly readable description of the lookup value.
Code	Displays the Code value of the lookup type.
Description	Enter a description of the lookup type.

Lookup Codes

Element	Description
Action	Choose options from the menu to perform the following operations: • **Create:** Click to create lookup code. • **Delete:** Click to delete the selected code.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Select to display the options to show or hide columns of the lookup details table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Sort:** – Ascending – Descending – Advanced * **Sort By:** Meaning or Code. Ascending or Descending. * **Then By:** Meaning or Code. Ascending or Descending. • **Reorder Columns:** Click to open a dialog box that lets you change the order of the table columns.
	Click to add the following lookup code details: • **Meaning:** Enter the meaning of the code. • **Code:** Enter the code.
	Click to delete the selected code.
Save	Click to modify the lookup type.
Cancel	Click to close the page without making any changes.

Related Topics

Modifying a Lookup Type in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Role Categories

Search

Use the Role Categories page to create, view, and manage role category.

Elements	Description
Search condition	Select a search condition from the list: • Starts with • Ends with • Equals • Does not equal • Contains • Does not contain
Search text box	Enter a value of the selected attribute as the search criterion.
Search	Click to search the role catalog based on the values entered in the search fields.
Saved Search	Select a saved search from the drop-down.
Save	Click to save the search conditions for later reuse.
Reorder	Click to open the Reorder Search Fields dialog box. Use the up and down arrow keys to reorder the search fields, and click **OK**.
Save	Click to save the search conditions for later reuse.
Add Fields	Click to display more field names. Select or deselect field name to add to or remove from the search.
Reset	Click to reset the values of the advanced search fields.

Search Results

Element	Description
Action	Choose options from the menu to perform the following operations: • **Create:** Click to create a role catalog. • **Open:** Click to view details of the selected role catalog. • **Delete:** Click to delete the selected role catalog. • **Refresh:** Click to update the screen with any changes made on the (back-end) server.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. • **Detach:** Click to open the table in a larger window. • • **Query By Example:** Click to show or hide the filter row that is displayed above the column headers to query on the columns.
Create	Click **Create** to create a role catalog.
Open	Click **Open** to view details of the selected role catalog.
Delete	Click **Delete** to delete the selected role catalog.
Refresh	Click **Refresh** to update the screen with any changes made on the (back-end) server.
	Click to show or hide the filter row that is displayed above the column headers to query on the columns.
Detach	Click **Detach** to open the table in a larger window.

Related Topics

Managing Role Categories in the *Oracle Fusion Middleware Administering Oracle Identity Governance*

Create Role Category

Attribute

Use the Create Role Category page to create the role category.

Element	Description
Role Category	Enter the name of the role category.

Element	Description
Role Category Description	Enter a description for the role category.
Save	Click to create the role category.
Cancel	Click to cancel the changes made to the page.

Related Topics

Creating a Role Category in the *Oracle Fusion Middleware Administering Oracle Identity Governance*

Open Role Category

Attribute

Use the Open Role Category page to view and modify the role category.

Element	Description
Role Category	Enter the name of the role category.
Role Category Description	Enter a description for the role category.
Apply	Click to save the changes.
Revert	Click to close the page without saving the changes.
Delete	Click to delete the role category.

Related Topics

Modifying a Role Category in the *Oracle Fusion Middleware Administering Oracle Identity Governance*

System Management - Notification

Use the System Management, Notification page to create your own notification tasks, view, and manage notification template.

Element	Description
Search text box	Enter the search criterion for the notification that you want to locate.
	Click to search for all the jobs that meet the search criteria.
Advanced Search	Click the Advanced Search link to display the advanced search options.

Advanced Search

Element	Description
Match	Select any one of the following options: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Template Name	Select a search condition in the list. The search conditions include Not Contains, Not Begins With, Not Equals, Equals, Ends With, Not Ends With, Contains, and Begins With. In the Template Name text box, enter the template name that you want to search.
Event Name	Select a search condition. The search conditions include Not Contains, Not Begins With, Not Equals, Equals, Ends With, Not Ends With, Contains, and Begins With. In the Event Name text box, enter the event name that you want to search.
Subject Details	Select a search condition in the list. The search conditions include Not Contains, Not Begins With, Not Equals, Equals, Ends With, Not Ends With, Contains, and Begins With. In the Subject Details text box, enter the value you want to search.
Search	Click to search the job based on the values entered in the advanced search fields.
Reset	Click to reset the values of the advanced search fields.
Add Field	Click to select other fields to add to the search criteria.

Search Result

Element	Description
Action	Choose options from the menu to perform the following operations: • **Open:** Click to view the selected notification template. • **Create:** Click to create a notification template. • **Delete:** Click to delete the selected notification template. • **Add Locale:** Click to add locales to a notification template. • **Remove Locale:** Click to remove locales from a notification template. • **Enable:** Click to enable a disabled notification template. • **Disable:** Click to disable an enabled notification template.

Element	Description

View	Choose commands from the View menu to control how the columns are displayed:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort:**
	  – Ascending
	  – Descending
	  – Advanced
	    * **Sort By:** Template Name or Event Name. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.

	Click to edit the selected notification template.
	Click to create a notification template .
	Click to delete the selected notification template .
	Click to open the table in full screen.

Create Template

Use the Create Template page to create a notification template.

Create Notification Template

Element	Description
Cancel	Click **Cancel** to cancel the changes made to the page.
Revert	Click to close the page without saving the changes.
Save	Click **Save** to create the template.

Element	Description
Template Information	
Template Name	Enter the notification template name.
Description Text	Enter the notification template description.
Event Details	
Available Event	Select the event for which the notification template is to be created.
Locale Information	
Encoding	Select the form of encoding, select either UTF-8 or ASCII.
Message Subject	Enter a subject for the notification.

Element	Description
Type	Select the data type in which you want to send the message, select either HTML and Text/ Plain.
Short Message	Enter a short version of the message.
Long Message	Enter the message that will be sent as the notification.

Related Topics

Managing Notification Templates in *Oracle Fusion Middleware Administering Oracle Identity Governance*

System Management - Scheduler

Search Scheduled Jobs

Use the System Management, Scheduler page to create your own scheduled tasks, search, view, and manage schedule task.

Element	Description
Search text box	Enter the search criterion for the job that you want to locate.
	Click to search for all the jobs that meet the search criteria.
Advanced Search	Click the Advanced Search link to display the advanced search options.

Advanced Search

Element	Description
Match	Select any one of the following options: • **All:** To specify that the search result must match all the specified search criteria. • **Any:** To specify that the search result must match any one of the specified search criteria.
Job Name	Select a search condition in the list. The search conditions include Not Contains, Not Begins With, Not Equals, Equals, Ends With, Not Ends With, Contains, and Begins With. In the Job Name text box, enter the job name that you want to search.
Status	Select a search condition. The search conditions include Equals and Does not equal. Select a status: All, Running, or Stopped.

Element	Description
Task Name	Select a search condition in the list. The search conditions include Not Contains, Not Begins With, Not Equals, Equals, Ends With, Not Ends With, Contains, and Begins With. In the Task Name text box, enter the task name that you want to search.
Search	Click to search the job based on the values entered in the advanced search fields.
Reset	Click to reset the values of the advanced search fields.

Search Result

Element	Description
Action	Choose options from the menu to perform the following operations: • **Open:** Click to view the selected job details. • **Create:** Click to create a job. • **Delete:** Click to delete the selected job. • **Run Now:** Click to start the selected job. • **Stop:** Click to stop the selected job. • **Enable:** Click to enable the selected job. • **Disable:** Click to disable the selected job.
View	Choose commands from the View menu to control how the columns are displayed: • **Columns:** Click a column header name to quickly show or hide a single column. • **Sort:** – Ascending – Descending – Advanced * **Sort By:** Job Name and Status. Ascending or Descending. * **Then By:** Job Name and Status. Ascending or Descending. • **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.
	Click to edit the selected scheduled job.
	Click to create a scheduled job.
	Click to delete the selected scheduled job.
	Click to open the table in full screen.

Job Details

Use the Job Details page to view job details.

Element	Description
Apply	Click **Apply** to create the job.
Run Now	Click **Cancel** to cancel the changes made to the page.
Stop	Click **Stop** to stop the job from running.
Enable	Click **Enable** to set the status of the job as enable.
Disable	Click **Disable** to set the status of the job as disable.
Refresh	Click **Refresh** to refresh the job updates.

Element	Description
Job Information	
Job Name	Displays the name for the job.
Task	Displays the name of the scheduled task that runs the job.
Start Date	Displays the date and time on which you want the job to run. Click  to modify the start date.
Retries	Enter the retry count for the job.
Schedule Type	Select one of the following schedule types: • **Periodic:** Select this option if you want the job to be run at a time that you specify, on a repeating basis. • **Cron:** Select this option if you want the job to be run at a particular interval on a recurring basis. • **Single:** Select this option if the job is to be run only once at the specified start date and time. • **No pre-defined schedule:** This option specifies that no schedule is attached to the job you are creating, and therefore, it is not triggered automatically.
Job Periodic Settings	
Run every	Enter the frequency by with the scheduled job needs to be run.
Run every drop-down	Select the frequency in mins, hrs, or days.
Scheduling Failed Notification	
Beneficiary	Select the type of beneficiary from the list: • User Login • Role Name • Specified Address

Element	Description
Send To	Enter the beneficiary details.
Job Status	
Current Status	Displays the current status of the job.
Last Run Start	Displays the date and time of when the job started to run last.
Last Run End	Displays the most recent date and time of when the job stopped running.
Next Scheduled Run	Displays the time when the job will run next.
Parameters	
File Path	Enter the path of CSV file for seeding metadata or directory path containing XML for seeding technical glossary.
Mode	Enter the mode.
Process Application Instances	Select if processing is required for application instances: • Yes • No
Process Entitlements	Select if processing is required for entitlements: • Yes • No
Process Roles	Select if processing is required for roles: • Yes • No
Update Date	Enter the date when the records will be updated.
Updated Date	Displays the date after which the records will be synchronized with catalog.
Job History	
Action	• **Show error details:** Click to view the exception details. Show error details pop-up is displayed. • **Show Milestones:** Click to view all the milestone information saved. Show Milestones pop-up is displayed.

Element	Description

View	Choose commands from the View menu to control how the columns are displayed:
	• **Columns:** Click a column header name to quickly show or hide a single column. Select Manage Columns to open the Manage Columns dialog box where you can select the columns to be shown or hidden.
	• **Sort:**
	  – Ascending
	  – Descending
	  – Advanced
	    * **Sort By:** Start Time, End Time, Job Status, Execution Status, Job parameters, or Additional Information. Ascending or Descending.
	    * **Then By:** Start Time, End Time, Job Status, Execution Status, Job parameters, or Additional Information. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.

Show error details	Click to view the exception details. Show error details pop-up is displayed.
Show Milestones	Click to view all the milestone information saved. Show Milestones pop-up is displayed.

Create Job

Use the Create Job page to create job.

Element	Description
Apply	Click **Apply** to create the job.
Cancel	Click **Cancel** to cancel the changes made to the page.
Save and Run Now	Click **Save and Run Now** to save the job and run the job immediately.

Element	Description
Job Information	
Job Name	Enter a name for the job.
Task	Enter the name of the scheduled task that runs the job.
Start Date	Enter the date and time on which you want the job to run.
Retries	Enter the retry count for the job.

Element	Description
Schedule Type	Select one of the following schedule types: • **Periodic:** Select this option if you want the job to be run at a time that you specify, on a repeating basis. • **Cron:** Select this option if you want the job to be run at a particular interval on a recurring basis. • **Single:** Select this option if the job is to be run only once at the specified start date and time. • **No pre-defined schedule:** This option specifies that no schedule is attached to the job you are creating, and therefore, it is not triggered automatically.
Job Periodic Settings	
Run every	Enter the frequency by with the scheduled job needs to be run.
Run every drop-down	Select the frequency in mins, hrs, or days.
Scheduling Failed Notification	
Beneficiary	Select the type of beneficiary from the list: • User Login • Role Name • Specified Address
Send To	Enter the beneficiary details.

Related Topics

Managing the Scheduler in *Oracle Fusion Middleware Administering Oracle Identity Governance*

System Management - System Properties

Search System Properties

Use the System Management, System Properties page to create your own system properties, view, and manage system properties.

Element	Description
Search text box	Enter the search criterion for the job that you want to locate.
	Click to search for all the jobs that meet the search criteria.
Advanced Search	Click the Advanced Search link to display the advanced search options.

Advanced Search

Element	Description
Property Name	Select a search condition in the list. The search conditions include Not Contains, Not Begins With, Not Equals, Equals, Ends With, Not Ends With, Contains, and Begins With. In the Property Name text box, enter the property name that you want to search.
Search	Click to search the job based on the values entered in the advanced search fields.
Reset	Click to reset the values of the advanced search fields.
Add Fields	Click to display more field names. Select or deselect field name to add to or remove from advanced search.

Search Result

Element	Description
Action	Choose options from the menu to perform the following operations: • **Open:** Click to view the selected system property details. • **Create:** Click to create a system property. • **Delete:** Click to delete the selected system property.

View	Choose commands from the View menu to control how the columns are displayed:
	• **Columns:** Click a column header name to quickly show or hide a single column.
	• **Sort:**
	  – Ascending
	  – Descending
	  – Advanced
	    * **Sort By:** Property Name and Keyword. Ascending or Descending.
	    * **Then By:** Property Name and Keyword. Ascending or Descending.
	• **Reorder Columns:** Click to open a dialog that lets you change the order of the table columns.

	Click to edit the selected system property.
	Click to create a system property.
	Click to delete the selected system property.
	Click to open the table in full screen.

Create System Property

The Create System Property page to create a system property.

Element	Description
System Information	
Property Name	Enter the system property name.
Keyword	Enter the keyword for the system property.
Value	Enter the value for the system property.
Cancel	Click to close the page without changes.
Reset	Click **Reset** to reset the system information.
Save	Click to create the system property.

System Property Detail

The System Property Details page to view the system property.

Element	Description
Key	Displays the key value for the system property.
Property Name	Enter the system property name.
Keyword	Enter the keyword for the system property.
Value	Enter the value for the system property.
Log In Required	Select if the user has to be logged in.
Cancel	Click to close the page without changes.
Reset	Click **Reset** to reset the system information.
Save	Click to modify the system property details.

Related Topics

Configuring Oracle Identity Governance in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Import

The Import Configuration wizard lets you import configuration objects into a deployment of Oracle Identity Manager that have been exported from another deployment.

Import Configuration

Use the Import Configuration wizard to import objects into your Oracle Identity Manager system.

Element	Description
Search	Click **Search** to open the Search page.
Import Options	Click **Import Options** to open the Import Options page.

Element	Description
Summary	Click **Summary** to open the Summary page.
Back	Click **Back** to go to the previous page of the Import Configuration page.
Next	Click **Next** to move to the next page of the Import Configuration page.

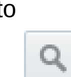
Search

Use the Search page to search for entity by name and type.

Element	Description
File to be Imported	Select the file that you want to import. Click **Browse** to select the file. Navigate to the location of the XML file, select the file, and click **Open**.
Next	Click **Next** to move to the Import Options page.
Back	Click **Back** to go to the previous page.

Import Options

Use the Import Objects page to select user and role references and object existence.

Element	Description
User Reference	Choose from the following user reference options: • **Keep Original:** Indicates that you do not want to make any changes to the user references. • **Change:** Indicates that you want to change the user reference. Click on , User To Import window is displayed. Search for the user by using the search option. Select the user from the search result table and click **Select**.
Role Reference	Choose from the following role reference options: • **Keep Original:** Indicates that you do not want to make any changes to the role references. • **Change:** Indicates that you want to change the role reference. Click on , Role To Import window is displayed. Search for the role by using the search option. Select the role from the search result table and click **Select**.

Element	Description
If Object Exists	Choose from the following object existence options: • **Skip:** Indicates that system definition is used for import. • **Override:** Indicates that system definition is overridden with the imported XML definition.
Back	Click **Back** to move to the Search page.
Next	Click **Next** to move to the Summary page.

Summary

Use the Summary page to review the previous selections.

Element	Description
File To be Imported	Displays the name of the XML file that is selected for import.
Selected Entities	Displays the entities selected in the Search page.
Page	Displays the page number of the result table.
Import Options	Displays the import options selected in the Import Options page.
Back	Click **Back** to open the Import Options page.
Import	Click **Import** to import the selected file.

Related Topics

Importing Deployments in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Export

The Export Configuration wizard lets you export the configuration artifacts of a deployment into an export XML file.

Export Configuration

Use the Export Configuration wizard to export objects from your Oracle Identity Manager deployment and save them in an XML file.

Element	Description
Search	Click **Search** to open Search page.
Export Options	Click **Export Option** to open Export options page.
Summary	Click **Summary** to open Summary page.
Back	Click **Back** to move to the previous page of the Export Configuration wizard.

Element	Description
Next	Click **Next** to move to the next page of the Export Configuration wizard.

Search

Use the Search page to search for entity by name and type.

Element	Description
Name	The name of the entity that you want to search. You can use the asterisk (*) wildcard character in the Name search field. The * character represents zero or more occurrences of alphanumeric character. For example, Role*, *Role, *OIM*, and so on. By default, * is appended at the end of the string entered.
Type	The type of the entity that you want to search. **Note:** If you are making a global search, that is, if you are trying to search for an entity name across all entity types, then a maximum of 25 records are displayed. You have to narrow down your search by specifying Entity Name or Entity Type from the lists.
	Click **Refresh** to update the screen with any changes made on the (backend).
Rows Displayed	Shows the number of rows displayed in the result table. You can also select the number of rows you want to display from the drop-down.
Page	Page number of the search result table.
Next	Click **Next** to open the Export Options page.

Export Options

Use the Export Options page to choose if dependent entities are to be downloaded.

Elements	Description
Dependency	Choose any one of the following: • **Yes:** If dependent entities need to be downloaded. • **No:** If there are no dependent entities to be downloaded.
Back	Click **Back** to open the Search page.
Next	Click **Next** to move to the Summary page.

Summary

Use the Summary option tab to review the previous selections.

Element	Description
Selected Entities	Displays the entities selected in the Search page.
Rows Displayed	Shows the number of rows displayed in the result table. You can also select the number of rows you want to display from the drop-down.
Page	The page number of the result table.
Export Options	Displays the selected option in the Export Options page.
Back	Click **Back** to open the Export Object page.
Export	Click **Export** to export the selected file by entering a mandatory description in the Export dialog box that opens.

Related Topics

Exporting Deployments in *Oracle Fusion Middleware Administering Oracle Identity Governance*

12
Upgrade

Use the Upgrade section of Identity System Administration to upgrade custom attributes for user, role, and organization entities, and to upgrade application instances.

The Upgrade section consists of the following pages:

- Upgrade User Form
- Upgrade Role Form
- Upgrade Organization Form
- Upgrade Application Instances

Upgrade User Form

Use the Upgrade User Form to upgrade the custom attributes of the user entity.

Element	Description
View	Select any one of the following from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Name, Display Name, LDAP Name, Display Type, Type, Required, and Searchable, of the attributes table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Upgrade User Form page in a separate window. • **Sort:** Select to sort the certification definitions in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns. • **Query By Example:** Select to show or hide the Query By Example (QBE) fields in the Certification Definitions page.
Upgrade Now	Click to upgrade the selected attributes of the user entity.
	Click to show or hide the Query By Example (QBE) fields in the Upgrade User Form page.
Detach	Click to detach the Upgrade User Form page in a separate window.

Upgrade Role Form

Use the Upgrade Role Form to upgrade the custom attributes of the role entity.

Element	Description
View	Select any one of the following from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Name, Display Name, LDAP Name, Display Type, Type, Required, and Searchable, of the attributes table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Upgrade Role Form page in a separate window. • **Sort:** Select to sort the role attributes in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns. • **Query By Example:** Select to show or hide the Query By Example (QBE) fields in the Upgrade Role Form page.
Upgrade Now	Click to upgrade the selected attributes of the role entity.
	Click to show or hide the Query By Example (QBE) fields in the Upgrade Role Form page.
Detach	Click to detach the Upgrade Role Form page in a separate window.

Upgrade Organization Form

Use the Upgrade Organization Form to upgrade the attributes of the organization entity.

Element	Description
View	Select any one of the following from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Name, Display Name, LDAP Name, Display Type, Type, Required, and Searchable, of the attributes table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Upgrade Organization Form page in a separate window. • **Sort:** Select to sort the custom organization attributes in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns. • **Query By Example:** Select to show or hide the Query By Example (QBE) fields in the Upgrade Organization Form page.
Upgrade Now	Click to upgrade the selected attributes of the organization entity.

Element	Description
	Click to show or hide the Query By Example (QBE) fields in the Upgrade Organization Form page.
Detach	Click to detach the Upgrade Organization Form page in a separate window.

Upgrade Application Instances

Use the Upgrade Application Instances page to upgrade application instances.

Element	Description
Upgrade Now	Click to upgrade instances by creating forms and datasets for application instances and seeding them to Oracle Identity Manager database.

13 Workflows

The Workflows region consists of the Approval Workflow Rules page. Use this page to manage approval workflow rules that determine whether or not request approval is required for an operation and which workflow is invoked for a specific operation.

Approval Workflow Rules

Use the Approval Workflow Rules page to create and manage approval workflow rules that determine whether or not request approval is required for an operation and which workflow is invoked for a specific operation.

Approval Workflow Configuration

Use the Approval Workflow Configuration section to view and select the operations for which you want to configure or manage rules.

Element	Description
View	Select one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Operation, of the operations table. Select Show All to display all the columns. • **Detach:** Select to detach the operations table in a separate window. • **Sort:** Select to sort the operations in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Query By Example:** Select to show or hide the Query By Example (QBE) field in the operations table.
	Click to show or hide the Query By Example (QBE) field in the operations table.
Detach	Click to detach the operations table in a separate window.
Operation	Click an operation to select it. The Rules section for the selected operation is displayed.

Rules

Use the Rules section to configure or manage rules for the operation selected in the Approval Workflow Configuration section.

Element	Description
View	Select one of the following options from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Rule Name, Rule Description, Workflow, and Order, of the rules table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the rules table in a separate window. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns. • **Query By Example:** Select to show or hide the Query By Example (QBE) fields for the rules table.
Create	Click to display the Create Rule page that lets you configure a new rule for the selected operation.
Edit	Click to open the Edit Rule page that lets you modify the selected rule.
Delete	Click to delete the selected rule.
	Click to show or hide the Query By Example (QBE) fields for the rules table.
Detach	Click to detach the rules table in a separate window.

Related Topics

Configuring Approval Workflow Rules in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Create Workflow Rule

Use the Create Workflow Rule page to configure a new approval rule for a selected operation.

Create Rule

Use the Create Rule section to specify attributes for the rule.

Element	Description
Name	Enter the name of the approval rule. This is a mandatory field.
Description	Enter a description for the approval rule.
Owner	Specify the user name as the owner of the approval rule. To do so, click the search icon adjacent to the Owner field, and then search and select an owner.
Status	Select a status for the rule. By default, the rule is in Enabled status.
Type	Displays the type of workflow used for the selected operation for which the rule is being created.
Create	Click to create the approval rule for the selected operation.
Cancel	Click to close the Create Workflow Rule page without created the approval rule.

Condition Builder

Use the Condition Builder section to specify rule conditions for configuring the approval rule.

Element	Description
Group	Click to group together the selected lines of rule conditions.
Ungroup	Click to upgroup the selected lines of rule conditions.
Add Condition	Click to add a new line to the rule condition.
Remove	Click to remove the selected line from the rule condition.
	Click to open the Condition Builder dialog box that lets you build your condition. The Condition Builder dialog box enables you to search and navigate through all the attributes so that you can select them to include in your rule condition.
Operators list	Select an operator, such as EQUAL or CONTAINS, to specify the relation between the left hand side and right hand side in the line of rule condition.

Related Topics

Creating Approval Workflow Rules in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Update Workflow Rule

Use the Update Workflow Rule page to modify the approval workflow rule for a particular operation.

Edit Rule

Use the Edit Rule section to modify the attributes of the approval workflow rule.

Element	Description
Name	Modify the name of the approval workflow rule. This is a mandatory field.
Description	Modify the description of the approval workflow rule.
Owner	Change the owner of the approval workflow rule by clicking the search icon adjacent to the field and searching and selecting a user as the owner.
Status	Select a status for the rule. By default, the rule is in Enabled status.
Type	Displays the type of workflow used for the selected operation for which the rule is being created. This is a read-only field.
Update	Click to save the modifications to the approval workflow rule.
Revert	Click to close the Update Workflow Rule page without saving the changes.

Condition Builder

Use the Condition Builder section to modify the rule conditions that comprise the approval workflow rule.

For information about the fields in the Condition Builder section of the Update Workflow Rule page, see Create Rule.

Related Topics

Modifying Approval Workflow Rules in *Oracle Fusion Middleware Administering Oracle Identity Governance*

Part III

Common Screens

The section consists the pages that are common to Oracle Identity Self Service and Oracle Identity System Administration pages:

- Sandboxes

14 Sandboxes

All customizations and form management are performed in a sandbox. A sandbox allows you to isolate and experiment with customizations without affecting the environment of other users.

Topics

Manage Sandboxes

Use the Manage Sandboxes page to create, update, delete, activate, deactivate, export, import, and publish sandboxes.

Available Sandboxes

Element	Description
View	Select one of the following from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Sandbox, Description, Active, Last Modified On, and Last Modified By, of the sandboxes table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Manage Sandboxes page in a separate window. • **Sort:** Select to sort the sandboxes in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Create Sandbox	Click to display the Create Sandbox dialog box that lets you create a new sandbox.
Delete Sandbox	Click to delete the selected sandbox. Click **Yes** to confirm deletion.
Refresh	Click to refresh the view of the list of sandboxes in the Manage Sandboxes page.
Activate Sandbox	Click to activate the selected sandbox. The sandboxes table refreshes and a marker in the Active column is displayed. In addition, the Sandboxes link on the upper navigation bar also displays the active sandbox name in parentheses.
Deactivate Sandbox	Click to deactivate the selected sandbox. The Manage Sandboxes page refreshes and the marker in the Active column disappears.

Element	Description
Publish Sandbox	Click to publish the selected sandbox. Click **Yes** to confirm.
Bulk Publish	Click to display the Bulk Import and Publish dialog box that lets you publish multiple sandboxes in bulk and in sequence.
»	Click the overflow icon to display more options on the toolbar.
Export Sandbox	Click to export the sandbox content ZIP file, which can be imported to another environment.
Import Sandbox	Click to import the sandbox to the target deployment.
Detach	Click to detach the Manage Sandboxes page in a separate window.

Published Sandboxes

Element	Description
View	Select one of the following from the View menu: • **Columns:** Select to display the options to show or hide columns, such as Sandbox, Description, Merged On, Merged By, Active, Last Modified On, and Post Merge Label, of the published sandboxes table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Manage Sandboxes page in a separate window. • **Sort:** Select to sort the published sandboxes in ascending or descending orders. Select **Advanced** to open the Advanced Sort window that lets you select advanced sort options. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns.
Detach	Click to detach the Manage Sandboxes page in a separate window.

Related Topics

Managing Sandboxes in *Oracle Fusion Middleware Developing and Customizing Applications for Oracle Identity Governance*

Create Sandbox

Use the Create Sandbox dialog box to create a new sandbox.

Element	Description
Sandbox Name	Enter a name for the sandbox. This is a mandatory field.
Sandbox Description	(Optional) Enter a description for the sandbox.
Activate Sandbox	Select to close all the open pages except the Manage Sandboxes pages and activate the created sandbox.
Save and Close	Click to close the Create Sandbox dialog box and create the sandbox.
Cancel	Click to close the Create Sandbox dialog box without creating the sandbox.

Related Topics

Creating a Sandbox in *Oracle Fusion Middleware Developing and Customizing Applications for Oracle Identity Governance*

Sandbox Details

Use the Sandbox Details page to modify the details of a sandbox.

Sandbox

Use the Sandbox section to view the sandbox attributes and change the description of the sandbox.

Element	Description
Name	Displays the sandbox name. This is a read-only field.
Full Name	Displays the full name of the sandbox. This is a read-only field.
Created By	Displays the user name that created the sandbox. This is a read-only field.
Created On	Displays the date on which the sandbox has been created. This is a read-only field.
Creation Label	Displays the label on which the sandbox is created. This is a read-only field.
Last Modified By	Displays the user’s name who last modified the sandbox. This is a read-only field.
Last Modified On	Displays the date on which the sandbox has been last modified. This is a read-only field.
Description	(Optional) Enter a description for the sandbox.
Export Sandbox	Click to export the open sandbox to another environment.

Change Details

Use the Change Details section to review and if required, delete, the customizations done within the open sandbox.

Element	Description
View	Select one of the following options: • **Columns:** Select to display the options to show or hide columns, such as Documents, Layer Values, Change Type, of the Change Details table. Select **Show All** to display all the columns. Select **Manage Columns** to open the Manage Columns dialog box where you can select the columns to be shown or hidden. • **Detach:** Select to detach the Change Details section in a separate window. • **Expand:** Select to expand the selected change detail in the Change Details table. • **Expand All Below:** Select to expand all the change details below the selected row in the Change Details table. • **Collapse All Below:** Select to collapse all the change details below the selected row in the Change Details table. • **Expand All:** Select to expand all the change details in the Change Details table. • **Collapse All:** Select to collapse all the change details in the Change Details table. • **Show As Top:** Select to move the selected change detail as the top row of the Change Details table. • **Go To Top:** Select to go the top of the Change Details table. • **Scroll To First:** Select to scroll to the first row of the Change Details table. • **Scroll To Last:** Select to scroll to the last row of the Change Details table. • **Reorder Columns:** Select to open the Reorder Columns dialog box that lets you rearrange the order of the visible columns. **Note:** Use the up and down arrow keys to scroll through the options in the View menu.
Delete Customization	Click to delete any changes made in the sandbox by selecting the change in the table.
Layer Names	Select a layer name to sort the change details related to the selected layer.
Layer Values	Select a layer value to sort the change details related to the selected layer.
Change Type	Select a type of change or customization to sort the change details related to the selected change type.
	Click to sort the change details in ascending or descending orders.
Detach	Click to detach the Change Details section in a separate window.
	Click the overflow icon to display more options on the toolbar.
	Click to go one row up in the Change Details table.

Element	Description
	Click to go the top of the Change Details table.
	Click to move the selected row as the first row of the Change Details table.

Related Topics

Viewing and Modifying Sandbox Details in *Oracle Fusion Middleware Developing and Customizing Applications for Oracle Identity Governance*