

# Novell Identity Manager

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IDENTITY MANAGER USER  
APPLICATION: ADMINISTRATION  
GUIDE

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# About This Guide

This guide describes how to administer the Novell Identity Manager user application. It includes these parts:

- ◆ Part I, “Overview,” on page 19
- ◆ Part II, “Configuring the User Application Environment,” on page 35
- ◆ Part III, “Administering the User Application,” on page 81
- ◆ Part IV, “Portlet Reference,” on page 207
- ◆ Part V, “Configuring and Managing Provisioning Workflows,” on page 283
- ◆ Part VII, “Appendixes,” on page 501

To learn about administering the other features of Identity Manager (which are common to all packages), see the *Novell Identity Manager: Administration Guide*.

## Audience

The information in this guide is for system administrators, architects, and consultants who are responsible for configuring, deploying, and managing the identity self-service features and workflow-based provisioning features of the Identity Manager user application.

End-user documentation for these features is provided in the *Identity Manager User Application: User Guide*.

## Feedback

We want to hear your comments and suggestions about this manual and the other documentation included with this product. Please use the User Comments feature at the bottom of each page of the online documentation, or go to [www.novell.com/documentation/feedback.html](http://www.novell.com/documentation/feedback.html) and enter your comments there.

## Documentation Updates

For the most recent version of the *Identity Manager User Application: Administration Guide*, visit the [Identity Manager Documentation Web site \(http://www.novell.com/documentation/idm35\)](http://www.novell.com/documentation/idm35).

## Documentation Conventions

In Novell documentation, a greater-than symbol (>) is used to separate actions within a step and items in a cross-reference path.

A trademark symbol (®, ™, etc.) denotes a Novell trademark. An asterisk (\*) denotes a third-party trademark.

When a single pathname can be written with a backslash for some platforms or a forward slash for other platforms, the pathname is presented with a backslash. Users of platforms that require a forward slash, such as Linux or UNIX, should use forward slashes as required by your software.



# Overview



This section introduces you to the Identity Manager User Application, and helps you plan for its use in your organization.

- ◆ [Chapter 1, “Introduction to the User Application,” on page 21](#)





# Introduction to the User Application

This section introduces the Identity Manager User Application. Topics include:

- ◆ [Section 1.1, “About the User Application,” on page 21](#)
- ◆ [Section 1.2, “User Application Architecture,” on page 23](#)
- ◆ [Section 1.3, “User Application User Types,” on page 28](#)
- ◆ [Section 1.4, “Design and Configuration Tools,” on page 31](#)
- ◆ [Section 1.5, “What’s Next,” on page 33](#)

## 1.1 About the User Application

The Identity Manager User Application is the business user’s view into the information, resources, and capabilities of Identity Manager. The User Application is a browser-based Web application that gives the user the ability to perform a variety of identity self-service tasks. In addition, when used in conjunction with the Provisioning Module and Novell Audit<sup>®</sup>, the User Application provides a complete, end-to-end provisioning solution, giving users the ability to initiate and manage provisioning requests and approvals. The Identity Manager User Application is secure, scalable, and easy to manage.

The User Application enables you to address the following business needs:

- ◆ Providing user self-service, allowing a new user to self-register, and providing access to anonymous or guest users.

The User Application provides a set of portlets for managing identity information for employees. You can use the portlets as-is or customize them to deliver the following identity management services:

- ◆ Create a directory object or launch a workflow to create objects.
- ◆ Search identity data for white pages, yellow pages, green pages.
- ◆ View and modify user profiles and attributes.

For more information, see [Part IV, “Portlet Reference,” on page 207](#).

- ◆ Ensuring that access to corporate resources complies with organizational policies and that provisioning occurs within the context of the corporate security policy.

You can grant users access to identity data within the guidelines of corporate security policies.

For more information, see [Section 2.2, “Security,” on page 39](#).

- ◆ Reducing the administrative burden of entering, updating, and deleting user information across all systems in the enterprise.

You can create customized workflows to provide a Web-based interface for users to manipulate distributed identity data triggering workflows as necessary.

For more information, see [Part V, “Configuring and Managing Provisioning Workflows,” on page 283](#).

- ◆ Managing manual and automated provisioning of identities, services, resources, and assets, and supporting complex workflows.

You can implement manual provisioning by creating workflows that route provisioning requests to one or more authorities. For automated provisioning, you can configure the User Application to start workflows automatically in response to events occurring in the Identity Vault.

For more information, see [Part V, “Configuring and Managing Provisioning Workflows,” on page 283](#).

### 1.1.1 About Identity Self-Service

Identity is the foundation of the User Application. The application uses identity as the basis for authorizing users access to systems, applications, and databases. Each user’s unique identifier—and each user’s roles—comes with specific access rights to identity data. For example, users who are identified as managers can access salary information about their direct reports, but not about other employees in their organization.

The *Identity Self-Service* tab within the application gives users a convenient way to display and work with identity information. It enables your organization to be more responsive by giving users access to the information they need whenever they need it. For example, users might use the *Identity Self-Service* tab to:

- ◆ Manage their own user accounts directly
- ◆ Look up other users and groups in the organization on demand
- ◆ Visualize how those users and groups are related
- ◆ List applications with which they are associated

The User Application Administrator is responsible for setting up the contents of the *Identity Self-Service* tab. What business users can see and do is typically determined by how the application has been configured, by their job requirements and level of authority.

### 1.1.2 About Workflow-Based Provisioning

A key feature of the Identity Manager User Application is workflow-based provisioning, which enables you to automate the approval and revocation of user access to your organization’s secure resources. Resources can include digital entities such as user accounts, computers, and databases.

The User Application’s *Requests & Approvals* tab gives users a convenient way to make requests for resources. A *provisioning request* is a user or system action intended to grant or revoke resources. Provisioning requests can be initiated directly by the user (through the *Requests & Approvals* tab), or indirectly in response to events occurring in the Identity Vault.

When a provisioning request requires permission from one or more individuals in an organization, the request starts one or more workflows. The workflows coordinate the approvals needed to fulfill the request. Some provisioning requests require approval from a single individual; others require approval from several individuals. In some instances, a request can be fulfilled without any approvals. A successful provisioning request results in a *provisioned resource*. Provisioned resources are mapped to Identity Manager entitlements.

By default, the *Requests & Approvals* tab in the User Application does not display any provisioning requests. To configure a provisioning request a designer familiar with your business needs creates a

*provisioning request definition*, which binds the resource to a workflow. The designer can configure workflows that proceed in a *sequential* fashion, with each approval step being performed in order, or workflows that proceed in a *parallel* fashion. A parallel workflow allows more than one user to act on a workflow task concurrently.

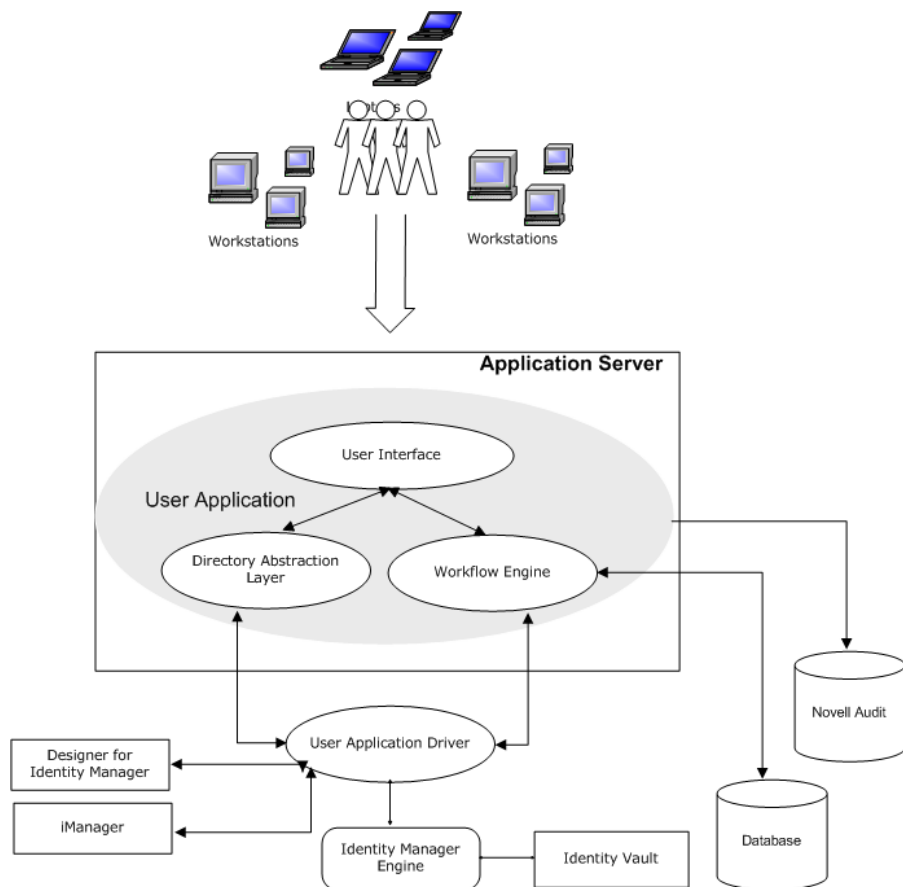
Identity Manager provides a set of Eclipse-based tools for designing the data and the flow of control within the workflows. In addition, Identity Manager provides a set of Web-based tools that provide the ability to configure existing provisioning requests, manage workflows that are in process, and define teams and team rights. For more information, see [Section 1.4, “Design and Configuration Tools,”](#) on page 31

The Provisioning Application Administrator is responsible for managing the workflow-based provisioning features of the User Application. For more information, see [Section 1.3, “User Application User Types,”](#) on page 28

## 1.2 User Application Architecture

The Identity Manager User Application relies on a number of independent components acting together. The core components are shown in [Figure 1-1](#).

**Figure 1-1** User Application Core Components



## 1.2.1 User Interface

The Identity Manager User Application is a browser-based Java\* application. It is comprised of a collection of JSR168-compliant portlets, JavaServer\* Pages, and JavaServer Faces that run within a Java Web application on a J2EE\*-compliant application server. The User Application framework provides container services, such as managing window state, portlet preferences, persistence, caching, theming, logging, and acts as a security gatekeeper. The application server, on which the User Application runs, provides various services to the application as a whole, such as scalability through clustering, database access via JDBC\*, and support for certificate-based security.

## 1.2.2 Directory Abstraction Layer

The directory abstraction layer provides a logical view of the Identity Vault data. You define a set of entities and their related attributes based on the Identity Vault objects that you want users to view, modify, or delete in the User Application. The Directory Abstraction layer:

- ◆ Performs all of the User Application’s LDAP queries against the Identity Vault. This isolates presentation-layer logic from the Identity Vault, so that all requests for identity data go through the directory abstraction layer.
- ◆ Checks constraints and access control on data requests made via the User Application.
- ◆ Caches runtime configuration and entity-definition data obtained from the Identity Vault. See [Section 5.1.1, “Caching Management,” on page 89](#)

You use the directory abstraction layer editor plug-in (available in Designer for Identity Manager) to define the structure of the directory abstraction layer data definitions. To learn more, see the section on the directory abstraction layer editor in the *Identity Manager User Application: Design Guide*.

## 1.2.3 Workflow Engine

The Workflow Engine (available with the Provisioning Module) is a set of Java executables responsible for managing and executing steps in an administrator-defined workflow and keeping track of state information (which is persisted in a database). When the necessary approvals have been given, the Provisioning System provisions the resource as requested.

During the course of workflow execution, the Workflow Engine can send one or more e-mail messages to notify users of changes in the state of the workflow. In addition, it can send e-mail messages to notify users when updates have been made to proxy, delegate, and availability settings.

You can edit an e-mail template in the Designer for Identity Manager or in iManager and then use this template for e-mail notifications. At runtime, the Workflow Engine retrieves the template from the directory and replaces tags with dynamic text suitable for the notification.

Additional details about the Workflow Engine, including how to configure and manage provisioning workflows, are in [Part V, “Configuring and Managing Provisioning Workflows,” on page 283](#).

## 1.2.4 SOAP Endpoints

The User Application provides the following SOAP endpoints to allow third-party software applications to take advantage of User Application services:

**Table 1-1** SOAP Endpoints

SOAP Endpoint	Description
Provisioning Web Service	To support third-party access, the provisioning Workflow Engine includes a Web service endpoint. The endpoint offers all provisioning functionality (for example, allowing SOAP clients to start a new approval flow, or list currently executing flows).
Metrics Web Service	The workflow engine also includes a Web Service for gathering workflow metrics. The addition of the Metrics Web Service to the Workflow Engine lets you monitor an approval flow process. In addition, it provides indicators the business manager can use to modify the process for optimal performance.
Notification Web Service	The Identity Manager Provisioning Module includes an e-mail notification facility that lets you send e-mail messages to notify users of changes in the state of the provisioning system, as well as tasks that they need to perform. To support third-party access, the notification facility includes a Web service endpoint that lets you send an e-mail message to one or more users.
Directory Abstraction Layer (VDX) Web Service	The directory abstraction layer provides a logical view of the Identity Vault data. To support access by third-party software applications, the directory abstraction layer includes a Web service endpoint called the VDX Web Service. This endpoint lets you access the attributes associated with entities defined in the directory abstraction layer. It also lets you perform ad hoc searches for entities and execute predefined searches called global queries.

## 1.2.5 Application Server (J2EE-Compliant)

The application server provides the runtime framework in which the User Application, directory abstraction layer and Workflow Engine execute. The User Application is packaged as a Java Web Application Archive, or WAR file. The WAR is deployed to the application server.

The User Application runs on JBOSS and WebSphere. For a complete list of supported platforms, see the *Installation Guide*.

## 1.2.6 Database

The User Application relies on a database (MySQL\* by default; see the Installation Guide for a list of supported databases) to store several kinds of information:

- ◆ User application configuration data: for example, Web page definitions, portlet instance registrations, and preference values.
- ◆ If the Provisioning Module is installed, workflow state information is persisted in the database. (The actual workflow definitions are stored in the User Application driver in the Identity Vault.)

- ◆ Novell Audit logs

## 1.2.7 User Application Driver

The User Application driver is an important enabling piece of the User Application. It is responsible for:

- ◆ Storing application-specific environment configuration data.
- ◆ Notifying the directory abstraction layer when important data values change in the Identity Vault. This causes the directory abstraction layer to update its cache.

If the Provisioning Module is installed, the User Application driver can be configured to:

- ◆ Allow events in the Identity Vault to trigger workflows.
- ◆ Communicate the success or failure of a workflow's provisioning activity back to the User Application database, which allows users to view the final status of their requests.
- ◆ Start workflows automatically in response to changes of attribute values in the Identity Vault.

The User Application driver is not only a runtime component but a storage wrapper for directory objects (comprising the User Application's runtime artifacts).

**Table 1-2** *Artifacts Stored in the User Application Driver*

Artifacts	Description
Driver Set Object	Every Identity Manager installation requires that drivers be grouped into driver sets. Only one driver set can be active at a time (on a given directory server). The drivers within that set can be toggled on or off individually without affecting the driver set as a whole. The User Application driver (like any other Identity Manager driver) must exist inside a driver set. The driver set is not automatically created by the User Application; you must create one, then create the User Application driver within it.
User Application	The User Application driver object is the container a variety of artifacts. The User Application driver implements Publisher and Subscriber channel objects and policies. The Publisher channel is not used by the User Application but is available for custom user cases.

Artifacts	Description
<i>App Config Object</i>	<p>The AppConfig object is a container for the following User Application configuration objects.</p> <ul style="list-style-type: none"> <li>◆ <b>RequestDefs:</b> Container for Provisioning Request Definitions. The definitions stored here (as XML) represent the classes of requests that end users with appropriate rights can instantiate via the User Application. (Provisioning Module only)</li> <li>◆ <b>WorkflowDefs:</b> :Container for Workflow objects, including design-time descriptions plus any template or unused flows.</li> <li>◆ <b>ResourceDefs:</b> Container for Provisioned Resource definitions, including design-time descriptions plus any templates or unused targets.</li> <li>◆ <b>ServiceDefs:</b> Container for Service Definition objects, which wrap Web Services called by workflows.</li> <li>◆ <b>DirectoryModel:</b> Directory abstraction layer objects that represent different types of content of the Identity Vault that can be exposed in the User Application.</li> <li>◆ <b>AppDefs:</b> Container for configuration objects that initialize the runtime environment, such as cache configuration information and e-mail notification properties.</li> <li>◆ <b>ProxyDefs:</b> Container for proxy definitions.</li> <li>◆ <b>DelegateeDefs:</b> Container for delegate definitions.</li> </ul>

## 1.2.8 Designer for Identity Manager

Designer for Identity Manager provides a set of plug-ins you can use to define the directory abstraction layer objects and provisioning requests and their associated workflows. For more information, see [Section 1.4, “Design and Configuration Tools,” on page 31](#)

## 1.2.9 iManager

iManager provides a set of plug-ins you can use to configure and manage provisioning requests and their associated workflows. These tools also let you define provisioning teams and team rights. For more information, see [Section 1.4, “Design and Configuration Tools,” on page 31](#).

## 1.2.10 Identity Manager Engine

The Identity Manager engine provides the runtime framework that monitors events in the Identity Vault and connected systems. It enforces policies and routes data to and from the Identity Vault. The Identity Manager User Application is a connected system. Communication between the Identity Vault, the User Application’s directory abstraction layer, and the Workflow Engine occurs through the User Application driver.

## 1.2.11 Identity Vault

The Identity Vault is the repository for user data (and other identity data) plus the Identity Manager driver set and the User Application driver. Because the User Application relies on various Identity Vault objects, it’s necessary to extend the eDirectory™ schema to accommodate the custom LDAP

objects and attributes required by the User Application. The schema extension occurs automatically as part of the User Application install. The custom objects and attributes are populated with default values after the User Application driver is installed and activated.

## 1.2.12 Novell Audit

Novell Audit is an independent logging server that can persist a variety of kinds of data (such as data generated by steps of a workflow). For more information, see [Chapter 3, “Setting Up Logging,” on page 71](#).

## 1.3 User Application User Types

The Identity Manager User Application users fall into these categories:

- ♦ Administrators
- ♦ Users
- ♦ Designers

### 1.3.1 Administrators

The User Application defines several types of administrative users. The administrative users defined in [Table 1-3](#) are defined at installation.

**Table 1-3** *User Application Administrative Users*

User	Description
LDAP Administrator	<p>A user who has rights to configure the Identity Vault. This is a logical role that can be shared with other administrative user types.</p> <p>The LDAP administrator account is a proxy user for the user application to carry out tasks on the LDAP server that an ordinary logged-in user might not have permission to execute, such as creating a new user, group, or container. It represents credentials (username and password) used to bind to the Identity Vault to perform system LDAP operations, so these are the rights that the user application itself needs to run. The LDAP administrator needs:</p> <ul style="list-style-type: none"><li>♦ Supervisor rights to the User Application Driver and all the objects it contains. You can accomplish this by setting the rights at the driver container level and making them inheritable.</li><li>♦ Supervisor Entry rights to any of the users that are defined through the directory abstraction layer user entity definition. This should include Write attribute rights to objectClass and any of the attributes associated with the DirXML-EntitlementRecipient, srvprvEntityAux and srvprvUserAux auxiliary classes.</li><li>♦ Read Rights to the container object cn=DefaultNotificationCollection, cn=Security. This object persists e-mail server settings used for automated provisioning e-mails. It can contain SecretStore credentials for authenticating to the e-mail server itself.</li></ul>



User	Description
User Application Administrator	<p>A user who has the rights to perform administrative tasks for the User Application. This user can:</p> <ul style="list-style-type: none"> <li>◆ Use the <i>Administration</i> tab of the User Application to manage the User Application.</li> <li>◆ Use iManager to administer workflow tasks (such as enabling, disabling, or terminating an in-process workflows)</li> <li>◆ Use iManager or Designer to create new provisioning requests, manage e-mail templates.</li> <li>◆ Run reports on Novell Audit logging data.</li> </ul> <p>This user does not have any special privileges on the <i>Requests &amp; Approvals</i> tab of the user application.</p> <p>This user does not need any special directory rights because it controls application level access via the Administration page. Although a User Application Administrator has the ability to manage themes in the Administration page, the User Application uses the LDAP administrator credentials to modify the theme selections in the Identity Vault.</p> <p><b>Password self-service:</b> One task of the User Application Administrator is to configure password self-service for the User Application. A feature of password self-service is password synchronization status. To enable the User Application Administrator to view the password synchronization status for other users (for troubleshooting or other reasons), it is recommended that you create a PasswordManagement group and assign one or more users to this group. The members of this group are allowed to view the password synchronization status of other users. If you choose to create this group, it must:</p> <ul style="list-style-type: none"> <li>◆ Be named PasswordManagement.</li> <li>◆ Be given the privileges to the Identity Vault. The group must have rights to read the user's eDirectory object attribute for users whose password synchronization status they need to view.</li> </ul>
Provisioning Application Administrator	<p>A user who is intended to allow you to delegate provisioning management tasks to a business user without giving him or her full administration rights to the User Application. By default, the Provisioning Administrator cannot access the Administration page, but he or she has full rights to the <i>Request &amp; Approvals</i> tab. For example, when the Provisioning Application Administrator logs in, he or she does not need to select a team because all users are considered to be his or her team members.</p>

## iManager Administrators

In addition to the users and their associated tasks above, Identity Manager includes administrators that use iManager to:

- ◆ Create new provisioning requests and workflows.
- ◆ Define teams.
- ◆ Define or manage e-mail templates.
- ◆ Administer workflow tasks (such as enabling, disabling, or terminating in-process workflows).

The user that performs these tasks can be one of the administrators listed above, or a different user that has been given the privileges to perform these tasks.

To create or edit or edit workflow objects in iManager, the user needs the following rights on the RequestDefs.AppConfig container for the specific User Application driver.

- ♦ [Entry Rights] Supervisor or Create.
- ♦ [All Attribute Rights] Supervisor or Write.

To initiate a workflow, the user must have Browse [Entry Rights] on the RequestDefs.AppConfig container for the specific User Application driver or individually per request definition object if you are using a delegated model.

## 1.3.2 Designers

Designers use the Designer for Identity Manager to customize the User Application for your enterprise. Designer is a tool aimed at information technology professionals such as enterprise IT developers, consultants, sales engineers, architects or system designers, and system administrators who have a strong understanding of directories, databases, and their information environment and who act in the role of a designer or architect of identity-based solutions.

To create or edit or edit workflow objects in Designer, the user needs the following rights on the RequestDefs.AppConfig container for the specific User Application driver.

- ♦ [Entry Rights] Supervisor or Create.
- ♦ [All Attribute Rights] Supervisor or Write.

To initiate a workflow, the user must have Browse [Entry Rights] on the RequestDefs.AppConfig container for the specific User Application driver or individually per request definition object if you are using a delegated model.

## 1.3.3 Users

The user is the person who views and interacts with the User Application's *Identity Self-Service* and the *Requests & Approval* tab (if the Provisioning Module is installed). A user can be:

- ♦ An *authenticated user* (such as an employee, a manager, or a delegate or proxy for an employee or manager). A *delegate user* is a user to whom one or more specific tasks (appropriate to that user's rights) can be delegated, so that the delegates can work on those specific tasks on behalf of someone else. A *proxy user* is an end user who acts in the role of another user by temporarily assuming that user's identity. All of the rights of the original user apply to the proxy. Work owned by the original user continues to be owned by that user.
- ♦ An *anonymous or guest user*. The anonymous user can be either the public LDAP guest account or a special account set up in your Identity Vault. The User Application Administrator can enable anonymous access to some features of the *Identity Self-Service* tab (such as a search or create request). In addition, the User Application Administrator can create pages that allow the user to request a resource. See [Table 1-8 on page 34](#) for information on configuring anonymous access.

The user's capabilities within the User Application depend on what features the User Application Administrator has enabled for them. They can be configured to:

- ♦ View hierarchical relationships between User objects by using the Org Chart portlet.
- ♦ View and edit user information (with appropriate rights).

- ◆ Search for users or resources using advanced search criteria (which can be saved for later reuse).
- ◆ Recover forgotten passwords.

If the Provisioning Module is installed, the User Application can be configured so that users can:

- ◆ Request a resource (start one of potentially many predefined workflows).
- ◆ View the status of previous requests.
- ◆ Claim tasks and view tasklists (by resource, recipient, or other characteristics).
- ◆ View proxy assignments.
- ◆ View delegate assignments.
- ◆ Specify one's availability.
- ◆ Enter proxy mode in order to claim tasks on behalf of another.
- ◆ View team tasks, request team resources, and so forth (managers only).

## 1.4 Design and Configuration Tools

The various administrators can use the following tools to design and configure the Identity Manager User Application.

**Table 1-4** Tools for Designing and Configuring the User Application

Tool	Purpose
Designer for Identity Manager	<p>A powerful, graphical toolset for configuring and deploying Identity Manager. The following plug-ins are designed to help you configure the User Application:</p> <ul style="list-style-type: none"> <li>◆ Directory Abstraction Layer editor: Lets you define the Identity Vault objects needed for your User Application.</li> <li>◆ Provisioning Request Definition editor: Lets you create workflows for provisioning request definitions. Also allows you to customize the forms by which users make and approve requests and e-mail templates.</li> <li>◆ Provisioning view: Lets you import, export, deploy, and migrate directory abstraction layer and provisioning requests to the User Application driver.</li> </ul>

For more information, see the *Identity Manager User Application: Design Guide*.

Tool	Purpose
iManager (for Provisioning Module only)	<p>A Web-based administration console. The following plug-ins are designed to help you configure and administer the User Application:</p> <ul style="list-style-type: none"> <li>◆ Provisioning Request Configuration plug-in: Lets you bind the provisioning request definition to a provisioned resource, specify the runtime characteristics of the associated workflow and enable its use.</li> <li>◆ Workflow Administration plug-in: Provides a browser-based interface that lets you view the status of workflow processes, reassign activities within a workflow, or terminate a workflow in the event that it is stopped and cannot be restarted.</li> <li>◆ Provisioning Team plug-in: Lets you define the characteristics of a team. A team identifies a group of users and determines who can manage provisioning requests and approval tasks associated with this team. The team definition consists of a list of team managers, team members, and team options.</li> <li>◆ Provisioning Team Request plug-in: Lets you specify the request rights for a team. The team requests objects specify a list of requests that fall within the domain of a team, as well as the rights given to the team managers. The request rights specify actions that team managers can perform on the provisioning requests and tasks.</li> </ul>
User Application Admin tab	<p>For more information, see <a href="#">Part V, “Configuring and Managing Provisioning Workflows,” on page 283</a></p> <p>A Web-based administration console that allows you to configure, manage, and customize the User Application. It contains the following pages:</p> <ul style="list-style-type: none"> <li>◆ Application Configuration: Lets you configure caching, LDAP parameters, logging, themes, password module setup</li> <li>◆ Page Administration: Lets you create new portlets or customize existing Identity Self-Service pages</li> <li>◆ Portlet Administration: Lets you create new or customize the existing portlets used on the Identity Self-Service pages.</li> <li>◆ Provisioning: Lets you configure Delegation, Proxy, Tasks, Digital Signature service, and engine and cluster settings.</li> <li>◆ Security: Lets you define who has Provisioning Administrator and User Application Administrator privileges.</li> </ul>
	<p>For more information, see <a href="#">Part III, “Administering the User Application,” on page 81.</a></p>

Tool	Purpose
<code>lreport.exe</code> (log report tool) and iManager Auditing and Logging feature	A number of predefined log reports (that come with Identity Manager) are available in Crystal Reports* (.rpt) format for filtering data logged to the Novell Audit database. The <code>lreport.exe</code> log report tool (Windows* only) is one way to generate the reports. You can also use other methods to create the reports. See <a href="#">Chapter 3, “Setting Up Logging,” on page 71</a> for details.

## 1.5 What’s Next

Now that you have learned about the features and architecture of the Identity Manager User Application, you can start to customizing it as needed for your own business needs. Typically, you’ll be:

- ♦ Customizing the user interface and identity self-service features. See [Table 1-6 on page 33](#).
- ♦ Setting up the requests and approval features (if provisioning is installed). See [Table 1-8 on page 34](#).
- ♦ Setting up your production environment. See [Table 1-7 on page 34](#).

**Table 1-5** *Customizing the User Interface and Identity Self-Service Features*

To learn about	See
Setting up directory abstraction layer objects	<i>Identity Manager User Application: Design Guide</i>
Customizing the Identity Self-Service pages	<a href="#">Part IV, “Portlet Reference,” on page 207</a>
Adding new pages and setting page security	<a href="#">Chapter 6, “Page Administration,” on page 139</a>
Creating custom instances of the identity portlets	<a href="#">Chapter 7, “Portlet Administration,” on page 173</a>
Changing the User Application’s theme or branding	<a href="#">Section 5.1.6, “Theme Administration,” on page 107</a>
Localizing the User Application user interface	<a href="#">Section 2.8, “Localizing Text,” on page 69</a>
Enabling password self-service	<a href="#">Section 5.3, “Password Management Configuration,” on page 120</a>

**Table 1-6** *Setting Up the Requests and Approvals Features*

To learn about	See
Creating provisioning requests	<i>Identity Manager User Application: Design Guide</i> and <a href="#">Chapter 17, “Configuring Provisioning Request Definitions,” on page 299</a>
Customizing request and approval forms	<i>Identity Manager User Application: Design Guide</i>
Defining teams	<a href="#">Chapter 19, “Configuring Provisioning Teams,” on page 351</a>

To learn about	See
Defining e-mail templates	<i>Identity Manager User Application: Design Guide</i> and Section 18.4, "Working with E-Mail Templates," on page 338

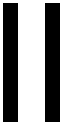
**Table 1-7** *Setting Up the User Application Production Environment*

To learn about	See
Your production environment topology	Section 2.1, "Topology," on page 37
Setting up security	Section 2.2, "Security," on page 39
Setting up digital signature support	Section 2.3, "Digital Signature Configuration," on page 43
Performance tuning strategies	Section 2.6, "Performance Tuning," on page 53
Setting up a cluster	Section 2.7, "Clustering," on page 58
Setting up logging	Chapter 3, "Setting Up Logging," on page 71

**Table 1-8** *User Application Configuration for Guest Access*

To learn about	See
Guest or anonymous accounts	Section 2.4, "Enabling Anonymous or Guest Access to the User Application," on page 50
Allowing anonymous users to self-register	Section 11.4, "Configuring the Create Portlet for Self-Registration," on page 218
Allowing anonymous access to the directory search	Section 15.3, "Configuring Search List for Anonymous Access," on page 280
Allowing anonymous access to the My profile or Organizational charts	Section 12.6, "Setting up Detail for Anonymous Access," on page 235 and Section 13.3, "Configuring Org Chart for Guest Access," on page 264
Allowing anonymous access to a workflow	Chapter 14, "Resource Request Portlet," on page 267

# Configuring the User Application Environment



These sections describe how to configure various aspects of the Identity Manager User Application environment to meet the needs of your organization.

- ◆ [Chapter 2, “Designing the Production Environment,” on page 37](#)
- ◆ [Chapter 3, “Setting Up Logging,” on page 71](#)





# Designing the Production Environment

This section discusses issues relating to setting up a production environment. It provides guidance on a number of considerations that come into play when making the transition from a sandbox, test, or other pre-production environment to a production environment.

This section is organized as follows:

- ◆ [Section 2.1, “Topology,” on page 37](#)
- ◆ [Section 2.2, “Security,” on page 39](#)
- ◆ [Section 2.3, “Digital Signature Configuration,” on page 43](#)
- ◆ [Section 2.4, “Enabling Anonymous or Guest Access to the User Application,” on page 50](#)
- ◆ [Section 2.5, “Configuring Forgotten Password Self-Service,” on page 51](#)
- ◆ [Section 2.6, “Performance Tuning,” on page 53](#)
- ◆ [Section 2.7, “Clustering,” on page 58](#)
- ◆ [Section 2.8, “Localizing Text,” on page 69](#)

## 2.1 Topology

Each major subsystem can have many instances and many ways of connecting. Not every possible layout is supported. This section includes three subsections that describe the possibilities and why some configurations are preferred over others.

- ◆ [Section 2.1.1, “Minimal Design,” on page 37](#)
- ◆ [Section 2.1.2, “High Availability Design,” on page 38](#)
- ◆ [Section 2.1.3, “Design Constraints,” on page 38](#)

### 2.1.1 Minimal Design

The simplest logical configuration of the User Application is a one-of-everything installation, consisting of one Identity Vault tree, one instance of the Identity Manager engine and drivers, and one instance of an application server running a single instance of the User Application. In terms of physical implementation, you could, in theory, run all of this on one machine. But you would not do that in the real world, for a variety of reasons including security, maintainability, and performance. In deciding on the number of machines needed for a practical real-world installation, you would want (at a minimum) to take the following into account:

**Novell Audit Server:** This application is responsible for capturing event information (and possibly a good deal of other information) from the User Application environment at runtime. It might also be doing double duty as a persistence store for other applications in your company. For a variety of reasons, you probably do not want to put other major pieces of the Identity Manager system (for example, the application server or the Identity Vault) on the same machine as the Audit server.

**Identity Vault:** This is a heavily trafficked component with a need for good performance and good scalability. Consider putting the Identity Vault on a dedicated machine. You probably do not want another high-traffic system, such as an application server with a deployment of the User Application, running on the same machine as the Identity Vault.

**Database:** If this instance of a supported database is also your Novell® Audit database, it is probably on a dedicated machine. The User Application uses this component in the following ways:

- ♦ As a persistence store for portal configuration data
- ♦ As the persistence store for state information on in-process workflows (if the Provisioning Module is installed)
- ♦ Optionally, as the logging store for Novell Audit.

**Application Server:** For performance and capacity reasons, you should probably run this piece on a dedicated machine.

These considerations suggest at minimum a three-machine configuration.

## 2.1.2 High Availability Design

Clustering for high availability and capacity is discussed in [Section 2.7, “Clustering,” on page 58](#). For now, you should know that:

- ♦ Identity Manager supports high availability of the Identity Vault, engine, and drivers through the multinode installation and shared-storage mechanisms described in the section “High Availability” in the *Identity Manager Administration Guide*. A comprehensive procedure for setting up such a system using SUSE® Linux is at:  
<http://support.novell.com/cgi-bin/search/searchtid.cgi?/10093317.htm> (<http://support.novell.com/cgi-bin/search/searchtid.cgi?/10093317.htm>)
- ♦ High availability of the User Application is available through JBoss clustering. You can set up a JBoss cluster so that each node runs one User Application instance. The instances are all coequals (peers).
- ♦ Automatic failover is supported. An interrupted workflow can resume after the loss of a cluster node.

See [Section 2.7, “Clustering,” on page 58](#) for more information.

## 2.1.3 Design Constraints

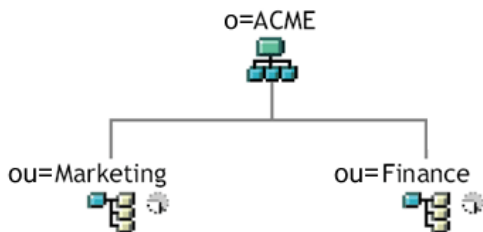
The two most important architectural constraints are:

- ♦ No User Application instance can service (search, query, add users to, and so forth) more than one user container. Also, a user container association with an application is meant to be permanent.
- ♦ No User Application driver can be associated with more than one User Application, except when the User Applications are installed on sister nodes of the same JBoss cluster. In other words, a one-to-many mapping of drivers to User Applications is not supported.

The first constraint enforces a high degree of encapsulation in User Application design.

Suppose you have the following organizational structure:

Figure 2-1 Sample Organizational Structure



During installation of the User Application, you are asked to specify the top-level user container that your installation looks for in the Identity Vault. In this case, you could specify `ou=Marketing,o=ACME` or (alternatively) `ou=Finance,o=ACME`. You cannot specify both. All User Application searches and queries (and administrator log-ins) are scoped to whichever container you specify.

---

**NOTE:** In theory, you could specify a scope of `o=ACME` in order to encompass Marketing and Finance. But in a large organization, with potentially many `ou` containers (rather than just two relating to Marketing and Finance), this is not likely to be practical.

---

It is possible, of course, to create two independent installations of the User Application (sharing no resources in common), one for Marketing and another for Finance. Each installation would have its own database, its own appropriately configured User Application driver, and each User Application would be administered separately, possibly having unique themes.

If you truly need to place Marketing and Finance within the same scope for one User Application installation, there are two possible tactics to consider. One is to insert a new container object (for example, `ou=MarketingAndFinance`) in the hierarchy, above the two sibling nodes; then point to the new container as the scope root. Another tactic is to create a filtered replica (a special type of eDirectory™ tree) that combines the needed parts of the original ACME tree, and point the User Application at the replica's `root` container. (Consult the Novell eDirectory Administration Guide for more information on filtered replicas.)

If you have questions about a particular system layout, contact your Novell representative for assistance or advice.

## 2.2 Security

This section includes the following topics:

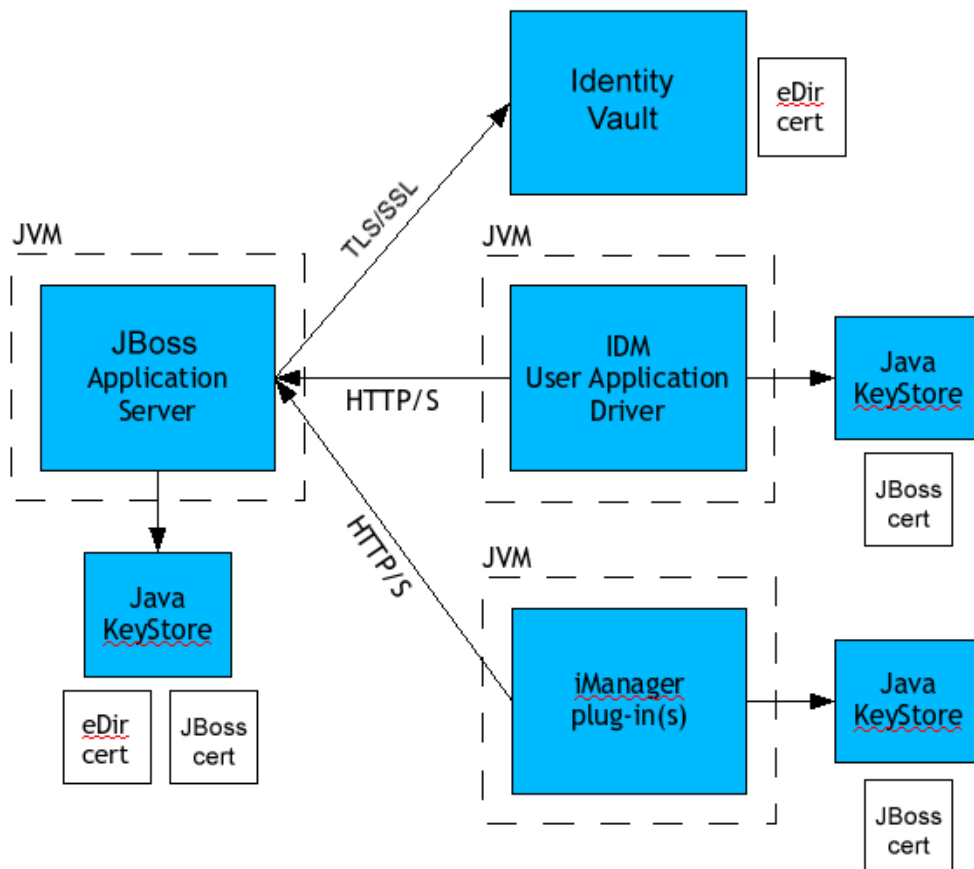
- ◆ [Section 2.2.1, “Security Overview,” on page 40](#)
- ◆ [Section 2.2.2, “Self-Signed Certificates,” on page 41](#)
- ◆ [Section 2.2.3, “Enabling SSL,” on page 41](#)
- ◆ [Section 2.2.4, “Turning on SOAP Security,” on page 41](#)
- ◆ [Section 2.2.5, “Mutual Authentication,” on page 42](#)
- ◆ [Section 2.2.6, “Third-Party Authentication and Single Sign-On,” on page 42](#)
- ◆ [Section 2.2.7, “Encryption of Sensitive User Application Data,” on page 42](#)

## 2.2.1 Security Overview

Moving from pre-production to production usually involves hardening the security aspects of the system. In sandbox testing, you might use regular HTTP to connect the User Application driver to the application server, or you might use a self-signed certificate (as a temporary measure) for driver/app-server communication. In production, on the other hand, you probably use secure connections, with server authentication based on your company's Verisign\* (or other trusted provider) certificate.

It is typical for X.509 certificates to be used in a variety of places in the Identity Manager User Application environment, as shown in the following diagram.

**Figure 2-2** Identity Manager User Application Environment



All communication between the User Application and the Identity Vault is secure, using Transport Layer Security, by default. The installation of the Identity Vault (eDirectory) certificate into the JBoss application server keystore is done automatically at install time. Unless you specify otherwise, the User Application installer places a copy of the eDirectory certificate in the JRE's default *cacerts* store. The installation of the certificate into the WebSphere application server keystore must be done manually using WebSphere tools.

The server certificate needs to be in several places, if communications are to be secure, as shown in the diagram. Different setup steps might be needed depending on whether you intend to use a self-

signed certificate in the various places in the diagram shown with a *JBoss cert* box, or you intend to use a certificate issued by a trusted certificate authority (CA) such as Verisign.

## 2.2.2 Self-Signed Certificates

If you are using a certificate from a well-known trusted issuer (for example, Verisign), no special configuration steps should be necessary. But if you intend to create and use a self-signed certificate, use the following steps:

- 1 Create a keystore with a self-signed certificate, using command line syntax similar to the following. Change the `dnname` value to match your web site and organization; change other values as appropriate.

```
keytool -genkey -alias IDM -keyalg RSA -storepass changeit -  
keystore jboss.jks -dnname "cn=www.novell.com,o=Novell,s=MA,c=US" -  
keypass changeit
```

Notice that you are creating the file `jboss.jks` as well as the certificate.

- 2 Copy the keystore file `jboss.jks` to your JBoss User Application directory, for example:

```
cp jboss.jks ~/jboss-4.2.0.GA/WAR/conf
```

## 2.2.3 Enabling SSL

The User Application uses HTML forms for authentication. As a result, user credentials are exposed during login. We strongly recommend that you enable SSL to protect sensitive information.

[Table 2-1 on page 41](#) lists references to directions on implementing SSL.

**Table 2-1** *Directions on Implementing SSL*

For Directions On	See
Configuring Access Manager to use SSL	<a href="http://www.novell.com/documentation/novellaccessmanager/basicconfig/index.html?page=/documentation/novellaccessmanager/basicconfig/data/bookinfo.html">Novell Access Manager 3.0 SP1 Setup Guide (http://www.novell.com/documentation/novellaccessmanager/basicconfig/index.html?page=/documentation/novellaccessmanager/basicconfig/data/bookinfo.html)</a> if you are using Access Manager to log in to the User Application.
Configuring the application server to use SSL	Documentation provided by the application server manufacturer. Configure the application server to use SSL before you configure the IDM User Application to use SSL.
Configuring the IDM User Application (as client) to use SSL to connect to the Identity Vault	<a href="http://www.novell.com/documentation/idm35/pdfdoc/install/install.pdf">IDM 3.5.1 Installation Guide, Chapter 5 "Installing the User Application"</a> ( <a href="http://www.novell.com/documentation/idm35/pdfdoc/install/install.pdf">http://www.novell.com/documentation/idm35/pdfdoc/install/install.pdf</a> ) for information on setting the following User Application configuration parameters at installation: Secure Admin Connection and Secure User Connection. These parameters can also be edited with the <code>configupdate</code> utility.

## 2.2.4 Turning on SOAP Security

- 1 In `IDM.war`, find the `web.xml` file and open it in a text editor.
- 2 At the bottom of the file, uncomment the following section:

```

<security-constraint>
  <web-resource-collection>
    <web-resource-name>IDMProv</web-resource-name>
    <url-pattern>/*</url-pattern>
    <http-method>POST</http-method>
    <http-method>GET</http-method>
    <description>IDM Provisioning Edition</description>
  </web-resource-collection>
  <user-data-constraint>
    <transport-guarantee>CONFIDENTIAL</transport
guarantee>
  </user-data-constraint>
</security-constraint>

```

- 3 Save the file and the archive, then restart JBoss.

## 2.2.5 Mutual Authentication

The Identity Manager User Application does not support client certificate-based authentication out of the box. That functionality can be obtained, however, by using Novell® Access Manager. See your Novell representative for more information. See also [Section 2.2.6, “Third-Party Authentication and Single Sign-On,” on page 42](#).

## 2.2.6 Third-Party Authentication and Single Sign-On

The Identity Manager User Application supports single sign-on through Access Manager using any third-party authentication service that can log into Access Manager. This capability enables using a non-password-based technology to log into the User Application through Access Manager. An example is logging in through a user (client) certificate, for example from a smart card.

Access Manager maps the user to a DN in the IDM Identity Vault. When a user logs into the User Application through Access Manager, Access Manager can inject a SAML assertion (with the user’s DN as the identifier) into an HTTP header and forwards the request to the User Application. The User Application uses the SAML assertion to establish the LDAP connection with the Identity Vault. For information on configuring Access Manager to support this capability, refer to the Access Manager documentation.

To secure the channels that carry requests, place the channels behind a firewall or on SSL connections. [Table 2-1 on page 41](#) lists references to directions on setting up SSL in your User Application environment.

Accessory portlets that allow single sign-on authentication based on passwords currently do not support single sign-on when SAML assertions are used for User Application authentication.

## 2.2.7 Encryption of Sensitive User Application Data

Any sensitive information associated with the User Application that is stored persistently is encrypted by using the symmetric algorithm AES-128. The master key itself is protected by password-based cryptography using PBESWithSHA1AndDESede. The password is never persisted or stored out of memory.

Information that is encrypted includes (but is not limited to):

- ◆ LDAP administrator user password
- ◆ LDAP guest user password
- ◆ DSS trusted CA keystore password
- ◆ DSS signature key keystore password
- ◆ DSS signature key entry password
- ◆ Novell Audit signature key

However, in a cluster environment, if session failover is enabled, some sensitive data (for example, a login-password for portlet single sign-on) in the user session can be transferred on the network during session replication. This can expose sensitive data to network sniffers. To protect this sensitive data, do one of the following:

- ◆ Enable encryption for JGroups. For information about enabling JGroups encryption, see [JGroups Encrypt \(http://wiki.jboss.org/wiki/Wiki.jsp?page=JGroupsENCRYPT\)](http://wiki.jboss.org/wiki/Wiki.jsp?page=JGroupsENCRYPT).
- ◆ Make sure that the cluster is behind a firewall.

## 2.3 Digital Signature Configuration

This section provides instructions on configuring your environment to take advantage of the digital signature support provided with the Identity Manager User Application.

---

**NOTE:** If you want to use the Novell Certificate Server™ (Novell PKI infrastructure) for digital signing features, you need to use eDirectory 8.8 or later. The digital signature functionality requires PKI 3.1, which ships with eDirectory 8.8.

---

**WARNING:** You must use Novell Audit (or Sentinel) to preserve documents that you digitally sign. Digital signature documents are not stored with workflow data in the User Application database, but are stored in the logging database. You must enable logging to preserve these documents.

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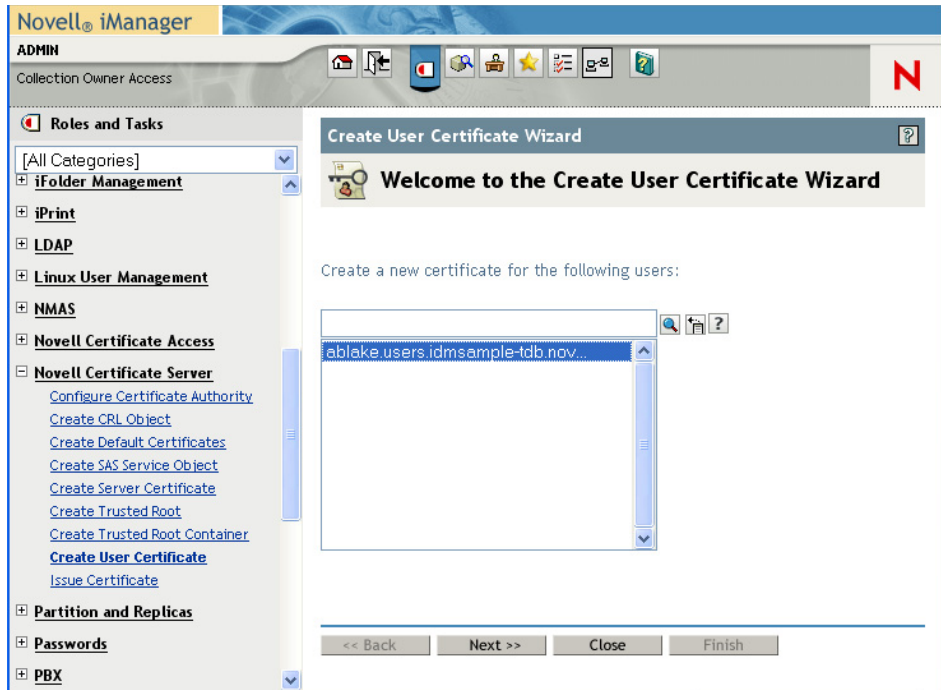
This section includes the following topics:

- ◆ [Section 2.3.1, “Setting Up the User Certificates,” on page 43](#)
- ◆ [Section 2.3.2, “Configuring the Application Server,” on page 47](#)
- ◆ [Section 2.3.3, “Configuring Logging,” on page 48](#)
- ◆ [Section 2.3.4, “Configuring the User Application,” on page 49](#)
- ◆ [Section 2.3.5, “Configuring the Provisioning Request Definitions,” on page 49](#)

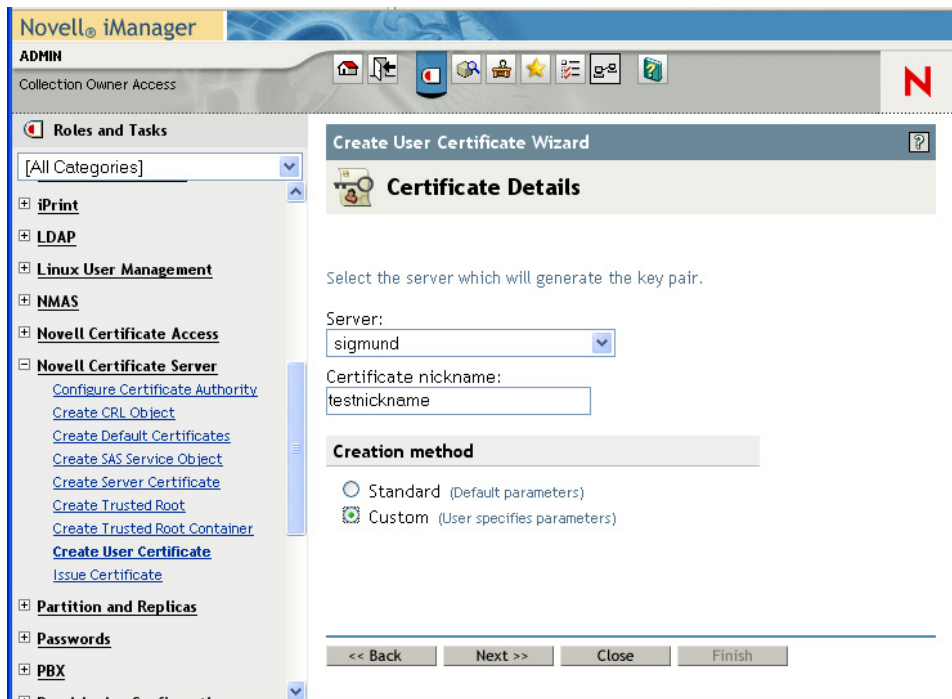
### 2.3.1 Setting Up the User Certificates

- 1 Create the user certificates using iManager.
  - 1a Log in as an administrator.
  - 1b Under *Novell Certificate Server*, select *Create User Certificate*.
  - 1c Select the users for whom you want to create certificates and click *Next*.

You can use the Object Selector or Object History to pick the users.

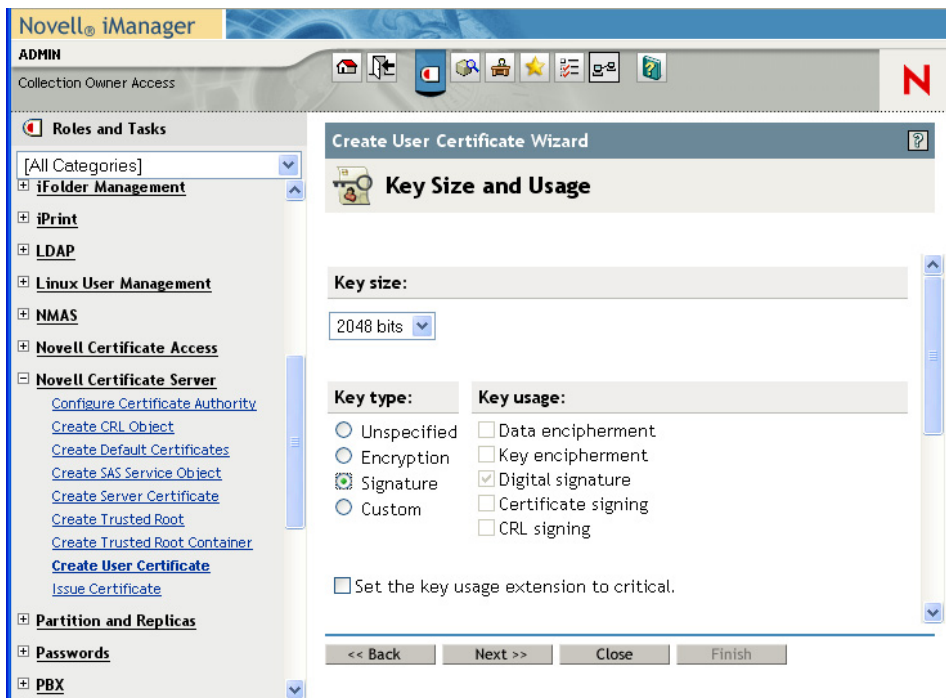


- 1d Select the server and specify the certificate nickname. Specify *Custom* as the creation method and click *Next*.



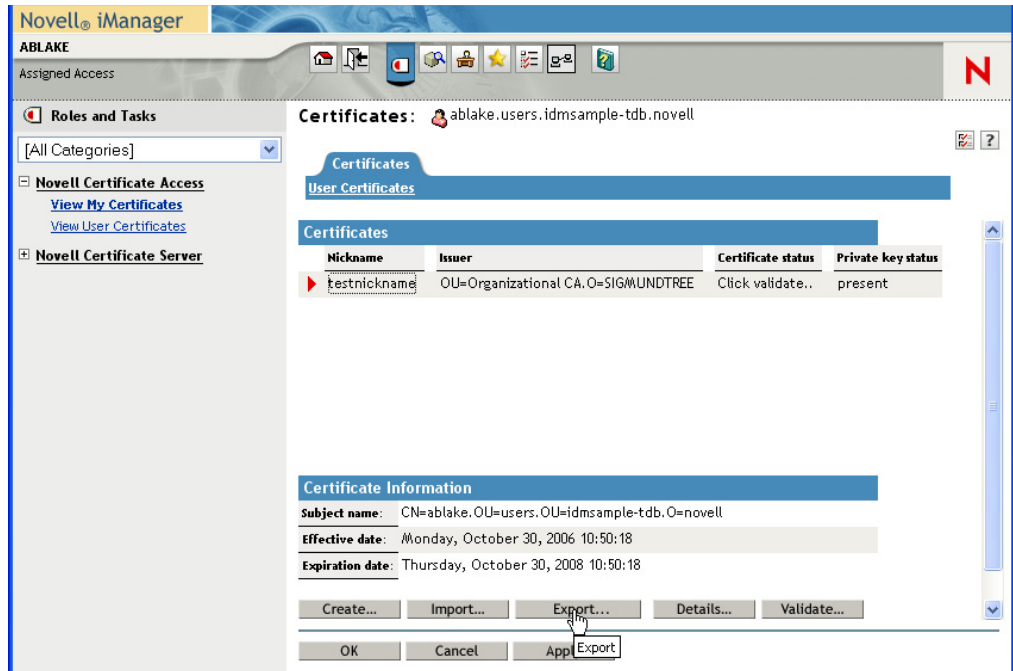


- 1e Specify a key size of 1024 or 2048 bits, depending on which size suits your requirements. Set the key type to *Signature*. Leave other settings as is and click *Next*.



- 1f If you're using the default configuration, leave the certificate parameters as is and click *Next*.  
To enable certificate revocation list (CRL) support, select Custom and check the CRL signing check box.  
For complete details on CRL configuration, see the Novell Certificate Server documentation.
- 1g Click *Finish*.
- 1h Log out.
- 2 Export the user certificate as a PFX file that contains the private key.
  - 2a Log in as the user for whom you want to export a certificate.
  - 2b Under *Novell Certificate Access*, select *View My Certificates*.

**2c** Select a certificate and click the *Export* button.



**2d** In the Export Certificate Wizard, click *Yes* to indicate that you want to export the private key with the certificate. Then click *Next*.



**2e** Enter a password to protect the private key and click *Next*.

**2f** Select *Export the certificate into the browser* if you do not have a card reader. Otherwise, click on the link that says *Save exported certificate to a file*.

You can also import to the browser later. Therefore, you might want to click on *Save exported certificate to a file* to import to a different browser.

**2g** Click *Save to Disk* to save the file rather than opening it.

**2h** Click *Close*.

**3** If you're using a smart card, install the smart card reader driver.

**4** Install the software needed to transfer certificate information to the smart card. For example, to get the smart card middleware software provided by cryptovision (cv act sc/interface), or download an evaluation copy of their product or documentation, go to: <http://www.cryptovision.com/idmdigsig.html>.

---

**NOTE:** You need to install version 3.3 or higher of the cryptovision middleware software. To transfer certificate information to the smart card, you need the administration software. The cryptovision software is not supported on Linux\*.

---

**5** Import the key pair (certificate) to the smart card:

If you are planning to use browser certificate support, rather than the smart card, you can skip steps 3 through 5 above. Certificates can be imported into a browser using iManager or the browser certificate management user interface. The cryptovision applet supports Internet Explorer and Firefox\* running on Windows only.

## 2.3.2 Configuring the Application Server

To configure the application server, follow these steps:

**1** Copy the following JARs to the `JBOSS_HOME/server/IDM/lib` directory if you are running JBoss, or to the `/IBM/WebSphere/AppServer/lib/ext` directory if you are using WebSphere:

- ♦ `dom.jar`
- ♦ `xmlsig.jar`
- ♦ `xmlsec.jar`

You can download `dom.jar`, `xmlsig.jar`, and `xmlsec.jar` from <http://java.sun.com>. These JARs are included with the Web Services Developer Pack.

For cryptovision, you also need `SafXVerifier.jar`. For details on downloading `SafXVerifier.jar`, see <http://www.cryptovision.com/idmdigsig.html> (<http://www.cryptovision.com/idmdigsig.html>).

**2** To deploy to JBoss, copy `xmlsigner.war` to the `JBOSS_HOME/server/IDM/deploy` directory.

To deploy to WebSphere, deploy `xmlsigner.war` using the WebSphere administration console.

For details on downloading `xmlsigner.war`, see <http://www.cryptovision.com/idmdigsig.html> (<http://www.cryptovision.com/idmdigsig.html>).

**3** Export the trusted root and all intermediate certificates (using iManager) and import them into the key store specified in your system's local configuration using the `keytool` command.

For example, for JBoss:

```
keytool -import -trustcacerts -file certFile
```

The *certFile* is a fully qualified path to the certificate file.

For example, for WebSphere:

```
keytool -import -trustcacerts -file servercert.der -alias  
myserveralias -keystore trust.p12 -storetype PKCS12
```

If you're using the Novell Certificate Server, you do not need to export the trusted root.

- 4 Start the User Application Configuration utility by running the configupdate script (configupdate.bat on Windows or configupdate.sh on Linux/Solaris).
- 5 Click *Show Advanced Options*.
- 6 Under *Trusted Key Store*, type the path to the certificate file in the *Trusted Store Path*. Also, type your password in the *Keystore Password* field. The default password is `changeit`.

The Trusted Key Store contains all trusted signers' certificates used to validate digital signatures.

---

**NOTE:** For JBoss, if you're using the Novell Certificate Server, you can simply paste the complete string (for example, `C:\Program Files\Java\jdk1.5.0_08\jre\lib\security\cacerts`) from the *Keystore Path* field under *eDirectory Certificates* to the *Trusted Store Path* under *Trusted Key Store*. You can also paste the *Keystore Password* to the *Trusted Store Password* field.

For WebSphere, an example of a string is `/opt/IBM/WebSphere/AppServer/profiles/AppSrv01/config/cells/citgoNode01Cell/nodes/MyServerNode01/trust.p12`.

- 7 If you are using OCSP, under *Miscellaneous*, type the URI for OCSP in the *OCSP URI* field. This value is used to update the status of trusted certificates online. The URI points to the access point for the Online Certificate Status Protocol server.

For more information about JBoss application server setup, refer to manufacturer's instructions, such as:

- ♦ *JBoss Enterprise Application Platform 4.2.0 Getting Started Guide* ([https://www.redhat.com/docs/manuals/jboss/jboss-eap-4.2/doc/Getting\\_Started.pdf](https://www.redhat.com/docs/manuals/jboss/jboss-eap-4.2/doc/Getting_Started.pdf))
- ♦ *JBoss Enterprise Application Platform 4.2.0 Configuration Guide* ([https://www.redhat.com/docs/manuals/jboss/jboss-eap-4.2/doc/Server\\_Configuration\\_Guide.pdf](https://www.redhat.com/docs/manuals/jboss/jboss-eap-4.2/doc/Server_Configuration_Guide.pdf))

### 2.3.3 Configuring Logging

To enable logging of digital signatures, you need to configure the logging Platform Agent. The Platform Agent is required on any client that reports events to Novell Audit or Sentinel. You configure the platform agent through the `logevent` configuration file. This file provides the configuration information that the platform agent needs to communicate with the Novell Audit server.

---

**IMPORTANT:** If you are logging events that include digital signatures, it is critical that the value of the `LogMaxBigData` parameter be large enough to handle the data being logged.

---

For details on logging configuration, see [Chapter 3, "Setting Up Logging," on page 71](#).

## 2.3.4 Configuring the User Application

To configure digital signature support for the User Application, you need to use the *Digital Signature Service* page on the *Administration* tab within the User Application. For details, see [Section 8.3, “Configuring the Digital Signature Service,” on page 194](#).

## 2.3.5 Configuring the Provisioning Request Definitions

You can use Designer for Identity Manager or iManager to configure digital signature support for your provisioning request definitions. The basic requirements for digital signature support are the same whether you perform your configuration steps in Designer or iManager.

To configure a provisioning request definition to support digital signatures, you need to:

- 1 Indicate whether a digital signature is required to initiate the provisioning request.
- 2 Indicate whether a digital signature is required for each approval step within the workflow. Because each approval step might have more than one outgoing link, you need to specify whether a digital signature is required for each link.

After you have indicated whether a digital signature is required to initiate a request or perform an approval step, you need to also specify the following for each request or approval step where a digital signature is required:

**Table 2-2** *Digital Signature Settings*

Setting	Description
Digital Signature Type	<p>Specifies whether the digital signature uses data or form as its type:</p> <ul style="list-style-type: none"><li>♦ <b>Data:</b> Specifies that the XML signature serves as the user agreement. When Data is selected, the XML data is written to the audit log. The user can preview XML data before submitting a signature.</li><li>♦ <b>Form:</b> Specifies that a PDF document that includes the digital signature declaration be generated. This document serves as the user agreement. The user can preview the generated PDF document before submitting a request or approval. When Form is selected, the PDF document (encapsulated in XML) is written to the audit log.</li></ul> <hr/> <p><b>WARNING:</b> You must use Novell Audit (or Sentinel) to preserve documents that you digitally sign. Digital signature documents are not stored with workflow data in the User Application database, but are stored in the logging database. You must enable logging to preserve these documents.</p>
Digital Signature Declaration	<p>Specifies a digital signature confirmation string that confirms the user's signature.</p>

For details on configuring provisioning request definitions in Designer, see the *Identity Manager User Application: Design Guide*. For details on configuring provisioning request definitions in iManager, see [Chapter 17, “Configuring Provisioning Request Definitions,”](#) on page 299.

## 2.4 Enabling Anonymous or Guest Access to the User Application

To enable anonymous or guest user to access the Identity Self-Service features of the User Application, follow the steps outlined in [Table 2-3](#).

**Table 2-3** *Setting Up Anonymous Access*

Task	For more information
Determine the guest account you want to use for the anonymous access.	See <a href="#">“Establishing the Guest Account”</a> on page 50.
Assign the proper Identity Vault rights to the guest user.	Define rights based on the features you want expose to non-authenticated Web application users. In the User Application, you can expose identity portlets such as the search, detail, or chart and create portlet. You can also allow users to initiate a workflow. In these cases the guest user account is used to bind to eDirectory and perform the underlying LDAP operation.
To perform Identity Self-Service tasks, create new pages and portlets specifically for guess access.	See <a href="#">Part IV, “Portlet Reference,”</a> on page 207.
To perform a resource request, use the resource request portlet.	See <a href="#">Chapter 14, “Resource Request Portlet,”</a> on page 267.

### 2.4.1 Establishing the Guest Account

There are two ways to support anonymous or guest access to the User Application. You can:

- ◆ Setup a dedicated user account. Set up the permissions that are needed for the activities of that anonymous user. Remember that if this user is inside the user container, this guest account is returned during searches of the tree. To prevent this, consider putting the guest user outside the user container.
- ◆ Use the public LDAP guest account that corresponds to the [Public] object in eDirectory. The default access for [Public] is Browse rights to the entire tree. You must set up whatever permissions are necessary for this user to perform the guest tasks you provide. If you do not want all anonymous users to perform some of these tasks, this might not be the correct option for your installation.

The User Application allows you to specify only one type of anonymous user, and you are required to specify that user during installation. The installation options are:

- ◆ **Use Public Anonymous Account:** This uses the LDAP guest account.
- ◆ **LDAP Guest:** This is the dedicated user account.

You can modify your installation choice by running the configupdate utility after the installation is complete.

## 2.5 Configuring Forgotten Password Self-Service

The User Application provides password self-service for users who have forgotten their passwords. This service enables

- ◆ Prompting for challenge responses
- ◆ Displaying a password hint
- ◆ Allowing a password change

The forgotten password service is available by default to users inside your corporate firewall through the deployed User Application WAR.

You can also set up a separate forgotten-password management WAR, `IDMPwdMgt.WAR`, and deploy it on a system inside your corporate firewall or external to the firewall. Deploying this WAR outside the firewall can provide an additional layer of security while providing forgotten-password self-service to remote users. The forgotten-password WAR is also called the *external password WAR*. To set up the external password WAR, see [Table 2-4](#).

`IDMPwdMgt.WAR` contains only forgotten-password self-service software and the default User Application theme.

**Table 2-4** Steps for Enabling an External Password WAR

Task	Description
Install the User Application. During the installation, you are asked to specify User Application configuration parameters. Specify the following to enable the external password WAR: <ul style="list-style-type: none"><li>◆ <i>Use External Password WAR</i></li><li>◆ <i>Forgot Password Link</i></li><li>◆ <i>Forgot Password Return Link</i></li></ul> You can also update the configuration after installation with the configupdate tool.	<p>When you specify <i>Use External Password WAR</i>, the install program generates and installs <code>IDMPwdMgt.WAR</code> in the install directory that you specify.</p> <p>For <i>Forgot Password Link</i>, specify the location for the external password WAR. Include the application server host and its secure port, for example <code>http://localhost:8080/ExternalPwd/jsp/pwdmgt/ForgotPassword.jsf</code>. The install program renames <code>IDMPwdMgt.WAR</code> based on the location you specify.</p> <p>For <i>Forgot Password Return Link</i>, supply the path that the external password WAR uses to call back the User Application, (it uses a Web Service), for example <code>https://idmhost:sslport/idm</code>.</p> <p>If you want to change the link locations, you can do so in the <i>User Application Administration</i> tab.</p>

Task	Description
Deploy the external password WAR to an application server.	<p>Before you deploy the external password WAR to an application server, ensure that the application server is configured to support SSL. See <a href="#">Section 2.2.3, “Enabling SSL,” on page 41</a>. In addition:</p> <ul style="list-style-type: none"> <li>◆ If the external password WAR is deployed outside the firewall, make sure that the firewall’s SSL port is open to allow communication between both application server hosts.</li> <li>◆ The application server that hosts the external password WAR must have the server certificate of the application server hosting the core User Application. Use the keytool import command to import the server certificate to the keystore (cacerts) of the JRE used by the application server hosting the external password WAR. The keytool command has this syntax: <pre>keytool -import -file certname.cer -keystore cacerts -storepass changeit -alias uacerts</pre> </li> </ul>
Do you want to customize the theme for the external password WAR?	For more information, see <a href="#">“Customizing the Theme for External Password WAR” on page 113</a> .

The external password WAR location is saved to the

```
configuration.AppDefs.AppConfig.driver.driverset as
```

```
<property>
```

```
<key>com.novell.pwdmgmt.login.PREF_FORGOT_PSWD_LINK_KEY</key>
```

```
<value>http://localhost:8080/ExternalPwd/jsps/pwdmgmt/
ForgotPassword.jsf</value>
```

The return location is saved to the

```
configuration.AppDefs.AppConfig.driver.driverset as
```

```
<property>
```

```
<key>com.novell.pwdmgmt.login.PREF_FORGOT_PSWD_RETURN_LINK_KEY</
key>
```

```
<value>https://localhost:8443/IDMProv</value>
```

```
</property>
```

The return location is saved to the userAppURL property in External WAR/WEB-INF/faces-managed-beans.xml, for example

```
<property-name>userAppURL</property-name>
```

```
<property-class>java.lang.String</property-class>
```

```
<value>https://localhost:8443/IDMProv</value>
```



## 2.5.1 Accessing an External Password WAR

Users can go to the *Forgot Password* page in the external password WAR directly from a browser like this:

```
http://localhost:8080/ExternalPwd/jsp/pwdmgmt/ForgotPassword.jsf.
```

When accessed directly, the external password WAR checks the `WEB-INF\faces-managed-beans.xml` for this entry:

```
<property-name>userAppURL</property-name>
<property-class>java.lang.String</property-class>
<value>https://151.155.254.69:8443/IDM</value>
```

The external password WAR uses the `userAppURL` entry to call the Web Service that handles the forgot password functionality in the User Application WAR.

Users can access the *Forgot Password* page by clicking the *Forgot Password?* link in the User Application's *Login* page. The User Application redirects the user to the external password WAR based on the value specified for the *Forgot Password link*. The external password WAR uses the *Forgot Password Return Link* value to call back to the User Application.

## 2.6 Performance Tuning

Performance tuning is a complex subject. The Identity Manager User Application relies on diverse technologies with many interactions. It is not possible to anticipate every single configuration scenario or user interaction scenario that could result in poor performance. Nevertheless, some subsystems are subject to best practices that can boost performance.

See the following sections for information:

- ◆ [Section 2.6.1, “Logging,” on page 53](#)
- ◆ [Section 2.6.2, “Identity Vault,” on page 54](#)
- ◆ [Section 2.6.3, “JVM,” on page 56](#)
- ◆ [Section 2.6.4, “Session Time-out Value,” on page 56](#)
- ◆ [Section 2.6.5, “Tuning JBoss,” on page 57](#)
- ◆ [Section 2.6.6, “Using Secure Sockets for User Application Connections to the Identity Vault,” on page 57](#)

### 2.6.1 Logging

The User Application allows logging with Novell Audit as well as with the open source Apache *log4j* framework. Logging via Novell Audit is turned off by default. However, file and console logging with *log4j* are enabled by default.

---

**NOTE:** The kinds of events you can log, and how to enable or disable logging, are covered in [Chapter 3, “Setting Up Logging,” on page 71](#).

---

The *log4j* configuration settings are contained in a file called

- ◆ `jboss-log4j.xml` in the install directory (if you are using a JBoss application server)

- ♦ `log4j.xml` in the User Application WAR (if you are using a non-JBoss application server)

Near the bottom of the `jboss-log4j.xml` file, look for the following entry:

```
<root>
  <priority value="INFO" />
  <appender-ref ref="CONSOLE" />
  <appender-ref ref="FILE" />
</root>
```

Assigning a value to `root` ensures that any log appenders that do not have a level explicitly assigned inherit the root level (in this case, INFO). For example, by default, the FILE appender does not have a threshold level assigned and so it assumes the root's.

The possible log levels used by log4j are DEBUG, INFO, WARN, ERROR, and FATAL, as defined in the `org.apache.log4j.Level` class. Inattention to the proper use of these settings can be costly in terms of performance.

A good rule of thumb is to use INFO or DEBUG only when debugging a particular problem.

Any appender included in the root that does have a level threshold set, should set that threshold to ERROR, WARN, or FATAL unless you are debugging something.

The performance hit with high log levels has less to do with verbosity of messages than with the simple fact that console and file logging, in log4j, involve synchronous writes. An `AsyncAppender` class is available, but its use does not guarantee better performance. The issues (which are well-known and are Apache log4j issues, not Identity Manager issues) are set forth at <http://logging.apache.org/log4j/docs/api-1.2.8/org/apache/log4j/performance/Logging.html> (<http://logging.apache.org/log4j/docs/api-1.2.8/org/apache/log4j/performance/Logging.html>).

The default of INFO in the User Application's log config file (above) is satisfactory for many environments, but where performance is critical, you should consider changing the above `jboss-log4j.xml` entry to:

```
<root>
  <priority value="ERROR"/>
  <appender-ref ref="FILE"/>
</root>
```

In other words, remove CONSOLE and set the log level to ERROR. For a fully tested/debugged production setup, there is no need to log at the INFO level, nor any need to leave CONSOLE logging enabled. The performance payoff of turning these off can be significant.

For more information on log4j, consult the documentation available at <http://logging.apache.org/log4j/docs>.

For more information on the use of Novell Audit with Identity Manager, consult the *Novell Identity Manager: Administration Guide*.

## 2.6.2 Identity Vault

LDAP queries can be a bottleneck in a heavily utilized directory-server environment. To maintain a high level of performance with large numbers of objects, Novell eDirectory (which is the basis of the Identity Vault in Identity Manager) records frequently requested information and stores it in

indexes. When a complex query is run against objects with indexed attributes, the query returns much faster.

Out of the box, eDirectory comes with the following attributes already indexed:

Aliased Object Name  
cn  
dc  
Equivalent to Me  
extensionInfo  
Given Name  
GUID  
ldapAttributeList  
ldapClassList  
Member  
NLS: Common Certificate  
Obituary  
Reference  
Revision  
Surname  
uniqueID  
uniqueID\_SS

When you install Identity Manager, the default directory schema is extended with new object class types and new attributes pertaining to the User Application. User-application-specific attributes are by default not indexed. For better performance, you might find it useful to index some of those attributes (and perhaps a few traditional LDAP attributes as well), particularly if your user container contains over 5,000 objects.

The general idea is to index only those attributes that you know are regularly queried, which could be different attributes in different production environments. The only way to know which attributes are heavily used is to collect predicate statistics at runtime. The collection process itself degrades performance, however.

The process for collecting predicate statistics is discussed in detail in the *eDirectory Administration Guide*. Indexing is also discussed in more detail there. In general, you need to do the following:

- ◆ Use ConsoleOne<sup>®</sup> to turn on predicate-statistics collection for attributes of interest
- ◆ Put the system under load
- ◆ Disable statistics collection and analyze the results
- ◆ Create an index for each type of attribute that might benefit from having one

If you already know which attributes you want to index, there is no need to use ConsoleOne. You can create and manage indexes in iManager with eDirectory *Maintenance > Indexes*. For example, if you know that users of your org chart are likely to perform searches based on the isManager attribute, you can try indexing that attribute to see if performance is enhanced.

---

**NOTE:** As a best practice, it is recommended that you index, at a minimum, the manager and isManager attributes.

---

For an in-depth discussion of attribute indexing and performance, see “Tuning eDirectory” in *Novell’s Guide to Troubleshooting eDirectory* by Peter Kuo and Jim Henderson (QUE Books, ISBN 0-7897-3146-0).

Also read about performance tuning in “Maintaining Novell eDirectory” in the *eDirectory Administration Guide*.

### 2.6.3 JVM

The amount of heap memory allocated to the Java virtual machine can impact performance. If you specify minimum or maximum memory values that are either too low or too high (too high meaning more than the physical memory of the machine), you could experience excessive pagefile swapping.

For a JBoss server, you can set the maximum JVM\* size by editing the `run.conf` or `run.bat` file (the former for Linux, the latter for Windows) under `[IDM]/jboss/bin/` in a text editor. Increase “-Xmx” from `128m` to `512m`, or possibly higher. Some experimentation might be needed to determine the optimal setting for your particular environment.

---

**NOTE:** JBoss and Tomcat performance tuning tips are at <http://wiki.jboss.org/wiki/Wiki.jsp?page=JBossASTuningSliming> (<http://wiki.jboss.org/wiki/Wiki.jsp?page=JBossASTuningSliming>)

---

### 2.6.4 Session Time-out Value

The session time out (the amount of time a user can leave a page unattended in his or her Web browser before the server causes a session-time-out warning dialog box to appear) can be changed in the `web.xml` file in the `IDM.war` archive. This value should be tuned to match the server and usage environment in which the application runs. In general, it is advised that the session time out be as small as practicable. If business requirements can tolerate a 5-minute session time out, this would allow the server to release unused resources twice as early as it would if the time-out value were 10 minutes. This improves performance and scalability of the Web application.

Consider the following when adjusting the session time out:

- ♦ Longer session time-outs can cause the JBoss server to run out of memory if many users log in over a short period of time. This is true of any application server that has too many open sessions.
- ♦ When a user logs in to the User Application, an LDAP connection is created for the user and bound to the session. Thus, the more sessions that are open, the greater the number of LDAP connections that are held. The longer the session time out, the longer these connections are held open. Too many open connections to the LDAP server (even if they are idle) can cause system performance degradation.
- ♦ If the server starts experiencing out-of-memory errors, and the JVM heap and garbage collection tuning parameters have already been optimally tuned for the server and usage environments, consider lowering the session time out.

Your application server might provide a way to specify session time out. Alternatively, you can adjust the session time-out value by opening the `IDM.war` archive, finding the `web.xml` file inside it, and editing the following portion of that file (in particular, the numeric value, shown here as 20, meaning 20 minutes, which is the default):

```
<session-config>
  <session-timeout>20</session-timeout>
</session-config>
```

Then, save the file and the archive, and restart the server.

---

**NOTE:** Manually editing Web archive files is best done by a person experienced in Java Web application development and deployment.

---

## 2.6.5 Tuning JBoss

By default, the JBoss deployment scanner runs every five seconds. For a production server, this is typically not necessary and might impact performance. You should consider changing the scan period so that the deployment scanner runs less frequently, or turn the deployment scanner off entirely. For information about configuring the deployment scanner, see [ConfiguringTheDeploymentScannerInConfjbossSystem](http://wiki.jboss.org/wiki/Wiki.jsp?page=ConfiguringTheDeploymentScannerInConfjbossSystem) (<http://wiki.jboss.org/wiki/Wiki.jsp?page=ConfiguringTheDeploymentScannerInConfjbossSystem.xml>).

For more information about tuning JBoss for production environments, see [JBossASTuningSliming](http://wiki.jboss.org/wiki/Wiki.jsp?page=JBossASTuningSliming) (<http://wiki.jboss.org/wiki/Wiki.jsp?page=JBossASTuningSliming>).

## 2.6.6 Using Secure Sockets for User Application Connections to the Identity Vault

By default, secure sockets are used for communication between the User Application server and the Identity Vault. However, in some environments, not all communication needs to be secured. For example, if the User Application and Identity Vault servers are on an isolated network, and the only ports available to the outside are the HTTP ports, it might be acceptable for some communication between the two servers to be accomplished using non-secure sockets. Some aspects of the application will *always* use a secure connection (for example, a user changing a password) even though the setting might indicate that secure connections are not required. Turning off secure connections, especially for user connections, can greatly increase performance and scalability. If, in a particular environment, there are many concurrent logins, and communication between the User Application server and the Identity Vault server have been secured using the network setup, then turning off the secure connection for user connections greatly increase the number of concurrent logins that can be processed. We recommend that this option be used only when there is actual evidence of scaling or performance problems in the environment, and adding additional eDirectory servers is not an option.

Additionally, secure connections can be turned off for administrative connections. These connections are used for general queries on the Identity Vault server that do not require user credentials. These connections are pooled and used round-robin. The bind over a secure connection is only done once at application startup (or possibly again later on if the connection becomes unresponsive) and so does not represent the scalability issues that can arise with the user connections. However, the time it takes to encrypt and decrypt the data at both ends does add overhead. We recommend that the default setting be used, unless there is a need to gain extra performance.

Secure communications for administrative and user connections must be disabled in both the User Application and in iManager. To disable secure communications for administrative and user connections, see the following topics:

- ◆ “Disabling Secure Communications Using the User Application Configuration Tool” on page 58
- ◆ “Disabling Secure Communications Using iManager” on page 58

## Disabling Secure Communications Using the User Application Configuration Tool

To disable the secure administrative and user connections in the User Application:

1 Run the `configupdate` script, located in the User Application directory, as follows:

- ♦ Linux: Type the following to run `configupdate.sh`:  
`./configupdate.sh`
- ♦ Windows: Run `configupdate.bat`

The User Application configuration utility starts.

2 Deselect *Secure Admin Connection* and *Secure User Connection*.



3 Click *OK*.

## Disabling Secure Communications Using iManager

To disable the requirement for secure LDAP (LDAPS) connections for administrative and user connections to eDirectory using iManager or ConsoleOne:

- 1 Log into your eDirectory tree.
- 2 Navigate to the *LDAP* group object and display its properties.
- 3 Click *General*.
- 4 Deselect *Require TLS for Simple Binds with Password*.

---

**NOTE:** In a multi-server eDirectory tree, disabling TLS on the LDAP group removes the TLS requirement from all servers. If you want mixed TLS requirements for each individual server in your tree, you must enable the TLS requirement on each server.

---

## 2.7 Clustering

This section includes the following topics:

- ♦ [Section 2.7.1, “Clustering an Application Server,” on page 58](#)
- ♦ [Section 2.7.2, “Things to Do Before Installing the User Application,” on page 60](#)
- ♦ [Section 2.7.3, “Installing the User Application to a JBoss Cluster,” on page 61](#)
- ♦ [Section 2.7.4, “Installing the User Application to a WebSphere Cluster,” on page 66](#)
- ♦ [Section 2.7.5, “Things to Do After Installing the User Application,” on page 67](#)

### 2.7.1 Clustering an Application Server

A cluster is a collection of application server nodes that provide a set of services. The purpose of a cluster is to increase performance and reliability of applications. In general, a cluster provides three key benefits for enterprise applications:

- ♦ High availability

- ♦ Scalability (more capacity)
- ♦ Load balancing

High availability means that an application is reliable and available for a high percentage of the time that it is deployed. Clusters provide high availability because the same application is running on all nodes. If one node fails, the application is still running on other nodes. The Identity Manager User Application benefits from higher availability when running in a cluster. In addition, the Identity Manager User Application supports HTTP session replication and session failover. This means that if a session is in process on a node and that node fails, the session can be resumed on another server in the cluster without intervention.

For more information about JBoss clusters, see the JBoss [wiki page for High availability and clustering services](http://wiki.jboss.org/wiki/Wiki.jsp?page=JBossHA) (<http://wiki.jboss.org/wiki/Wiki.jsp?page=JBossHA>).

## JGroups Cluster Groups

The JGroups communications module provides communications among groups that share a common name, multicast address, and multicast port. JGroups is installed with JBoss, but it can also be used without JBoss. The User Application includes a JGroups module in the User Application WAR to support caching in a cluster environment.

## JBoss Groups Cluster Groups

JBoss clusters are based upon the JGroups communications module. When you install a clustered JBoss server, JBoss defines several independent JGroups cluster configurations for use in managing the cluster. The primary one is called *DefaultPartition* and is defined in `/deploy/cluster-service.xml`. This cluster group is used to provide core clustering services. The second cluster group is named *Tomcat-Cluster*. This configuration is defined in `/deploy/jboss-web-cluster.sar/META-INF/jboss-service.xml`. It provides session replication support for the web server that runs inside JBoss. JBoss provides additional cluster group configurations to manage ejb3 services.

## User Application Cluster Group

The Identity Manager User Application uses an additional cluster group solely to coordinate User Application caches in a clustered environment on either JBoss or WebSphere clusters.

The User Application cluster group is independent of the two JBoss cluster groups and does not interact with them. By default, the User Application cluster group and the two JBoss groups use different group names, multicast addresses, and multicast ports, so no reconfiguration is necessary.

By default, this cluster group uses a UUID name to minimize the risk of conflicts with other cluster groups that users might add to their servers. The default name is `c373e901aba5e8ee9966444553544200`. By default, the group uses multicast address `228.8.8.8` and runs on port `45654`. This cluster isn't configured using a JBoss service file. Instead, the configuration settings are located in the directory and can be configured using the User Application administration features. If you are familiar with JGroups and JBoss clustering, you can adjust the User Application cluster configuration using this interface. Changes to the cluster configuration only take effect for a server node when that node is restarted.

User Application cluster group settings are shared by any Identity Manager application that shares the directory configuration. The purpose of the local settings option in the User Application administration interface is to allow an administrator to remove a node from a cluster, or change the

membership of servers in a cluster. For example, you can disable clustering globally, then enable it locally for a subset of your servers sharing the directory configuration.

## 2.7.2 Things to Do Before Installing the User Application

This section provides information that you should be aware of before you install the User Application, and describes tasks that you should perform before installing the User Application.

This section includes the following topics:

- ◆ “About Multiple Clusters on the Same Network” on page 60
- ◆ “Synchronizing Application Server Clocks” on page 60
- ◆ “Avoiding Multiple Browser Tab Logins from the Same Browser Window in a Cluster” on page 61
- ◆ “About the User Application Database” on page 61

### About Multiple Clusters on the Same Network

If you have more than one cluster running on a network, you must separate the clusters to prevent performance problems and anomalous behavior. You accomplish this by ensuring that each cluster uses a different partition name, multicast address, and multicast port. Even if you are not running multiple clusters on the same network, it’s a good idea to specify a unique partition name for the cluster, rather than using the default partition.

The following are important points:

- ◆ The cluster must have a unique cluster partition name and multicast address.

For JBoss, specify the cluster partition name and multicast address by editing the JBoss startup script (`start-jboss.bat` or `start-jboss.sh` for Windows or Linux, respectively) supplied with the User Application. You need to modify the JBoss startup scripts for your servers to start JBoss with a `-D` flag and set the `jboss.partition.name` and `jboss.partition.udpGroup` system properties (see “Configuring the Workflow Engine” on page 63).

- ◆ The cluster must use a unique multicast port.

For JBoss, specify the port to use by editing the `mcast_port` attribute in the JBoss server `deploy\cluster-services.xml` file.

For JBoss, you can find instructions about running more than one cluster on a network by using your browser to view [Two Clusters Same Network](http://wiki.jboss.org/wiki/Wiki.jsp?page=TwoClustersSameNetwork) (<http://wiki.jboss.org/wiki/Wiki.jsp?page=TwoClustersSameNetwork>).

### Synchronizing Application Server Clocks

You must synchronize the clocks of the servers in a User Application cluster. If server clocks are not synchronized, sessions might time out early, causing HTTP session failover to not work properly. There are many time synchronization methods available. The method that you use depends on the needs of your organization. One common approach is to use the Network Time Protocol (NTP). For a discussion of using the xNTP protocol for time synchronization, see [Time Synchronization using Extended Network Time Protocol \(xntp\)](http://www.novell.com/coolsolutions/trench/15650.html) (<http://www.novell.com/coolsolutions/trench/15650.html>).



## Avoiding Multiple Browser Tab Logins from the Same Browser Window in a Cluster

We do not recommend using multiple logins across browser tabs or browser sessions on the same host. Some browsers share cookies across tabs and processes, so using multiple logins might cause problems with HTTP session failover (in addition to risking unexpected authentication functionality if multiple users share a computer).

## About the User Application Database

When you install the User Application using the User Application installation program, you designate an existing version of a supported database to use (for example, MySQL, Oracle or Microsoft SQL Server). The database is used to store User Application data and User Application configuration information.

When the User Application is installed in a cluster environment, all nodes in the JBoss cluster must access the same database instance. The User Application uses standard JDBC calls to access and update the database. The User Application uses a JDBC data source bound to the JNDI tree to open a connection to the database.

When you install the User Application into a JBoss cluster by using the User Application installation program, the data source is installed for you. The installation program creates a data source file named `IDM-ds.xml`, and places this file in the deploy directory (for example, `server/IDM/deploy`). The installation program also places the appropriate JDBC driver for the database specified during installation in the `lib` directory (for example, `/server/IDM/lib`). For more information about setting up the User Application database for a cluster, see [“Specifying the User Application Database” on page 62](#).

---

**NOTE:** By default, MySQL sets the maximum number of connections to 100. This number might be too small to handle the workflow request load in a cluster. If the number is too small, you might see the following exception:

```
(java.sql.SQLException: Data source rejected establishment of connection, message from server: "Too many connections.")
```

To increase the maximum number of connections, set the `max_connections` variable in `my.cnf` to a number greater than 100.

---

## 2.7.3 Installing the User Application to a JBoss Cluster

To install the User Application to a cluster, use the User Application installation program to install the User Application to each node in the cluster (see “Installing the User Application in the *Identity Manager 3.5 Installation Guide*). This section provides notes that are specific to installing the User Application to a cluster.

This section includes the following topics:

- ◆ [“About the Server Configuration” on page 62](#)
- ◆ [“Specifying the User Application Database” on page 62](#)
- ◆ [“Selecting the Cluster \(all\) Option” on page 62](#)
- ◆ [“Configuring the Workflow Engine” on page 63](#)
- ◆ [“Using the Same Master Key for Each User Application in the Cluster” on page 64](#)
- ◆ [“Starting the User Application Cluster Group” on page 65](#)

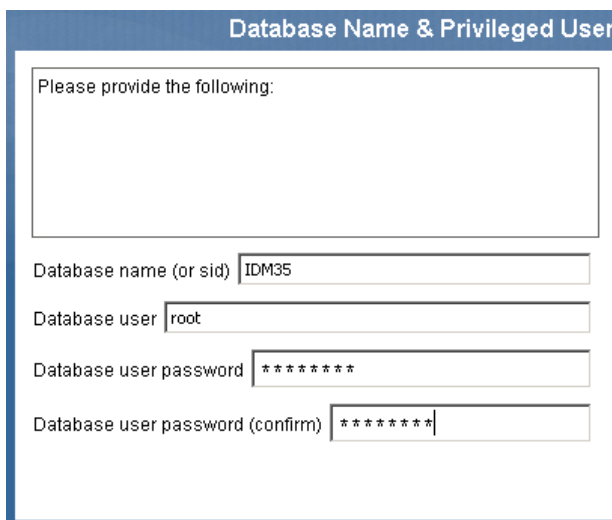
## About the Server Configuration

JBoss comes with three different ready-to-use server configurations: *minimal*, *default* and *all*. Clustering is only enabled in the *all* configuration. A `cluster-service.xml` file in the `/deploy` folder describes the configuration for the default cluster partition. When you install the User Application and indicate to the installation program that you want to install into a cluster, the installation program makes a copy of the *all* configuration, names the copy IDM (this is the default; the installation program allows you to change the name), and installs the User Application into the this configuration.

## Specifying the User Application Database

All nodes in the JBoss cluster must access the same database instance. When you use the User Application installation program, you are prompted to specify the database name, host and port:

**Figure 2-3** *Specifying the Database Host and Port*



The screenshot shows a dialog box titled "Database Name & Privileged User". Inside the dialog, there is a text area with the prompt "Please provide the following:". Below this are four input fields:

- Database name (or sid): IDM35
- Database user: root
- Database user password: \*\*\*\*\*
- Database user password (confirm): \*\*\*\*\*

Make sure that you specify the same database parameters each time you install the User Application to a cluster node.

## Selecting the Cluster (all) Option

When you use the User Application installation program, you are prompted to specify the IDM configuration:

**Figure 2-4** Specifying the Cluster (all) Option and Engine ID

Choose 'default' for a single instance, or 'all' if you plan to employ clustering. We will copy one of these servers to "Server name" and customize it to your needs. The "Workflow Engine ID" is only valid for cluster installs.

**Single node (default) or cluster (all)?**

default  all

Server name

Workflow Engine ID

Select the *clustering (all)* option.

## Configuring the Workflow Engine

Workflow engine clustering works independently of the User Application cache framework. There are several steps that you must perform to ensure that the workflow engine works correctly in a cluster environment.

- All servers in the cluster need to be pointing to the same database.

When you install the User Application to the cluster using the User Application installation program (see [“Installing the User Application to a JBoss Cluster” on page 61](#)), you accomplish this by specifying the IP address or host name of the server on which the database for the User Application is installed.

- Each server in the cluster needs to be started with a unique engine-id.

You can accomplish this by setting the `com.novell.afw.wf.engine-id` system property at server startup. For example, if you wanted to start JBoss and assign the engine id `ENGINE1` to the workflow engine for that server, you would use the following command:

```
run.sh -Dcom.novell.afw.wf.engine-id=ENGINE1 (Linux)
run.bat -Dcom.novell.afw.wf.engine-id=ENGINE1 (Windows)
```

You might want to combine the setting of this system property with the setting of other system properties (see [“Setting JBoss system properties in the JBoss startup script” on page 63](#)).

For information about managing running workflows, see [Section , “Managing Workflows in a Cluster,” on page 69](#).

### Setting JBoss system properties in the JBoss startup script

Each server in the cluster should be started using the same partition name and partition UDP group (see [“About Multiple Clusters on the Same Network” on page 60](#)). Each server in the cluster should use a unique engine ID (see [“Configuring the Workflow Engine” on page 63](#)).

You can modify your JBoss startup script (`start-jboss.bat` for Windows, `start-jboss.sh` for Linux) to specify all of these system properties. This script is located in the

directory in which your User Application files are stored. For example, to start a server using the partition name “Example\_Partition”, the UDP group “228.3.2.1” and the Engine ID “Engine1” you would add the following to the start-jboss script:

```
start run.bat -c IDM -Djboss.partition.name=Example_Partition -  
Djboss.partition.udpGroup=228.3.2.1 -Dcom.novell.afw.wf.engine-  
id=Engine1
```

## Using the Same Master Key for Each User Application in the Cluster

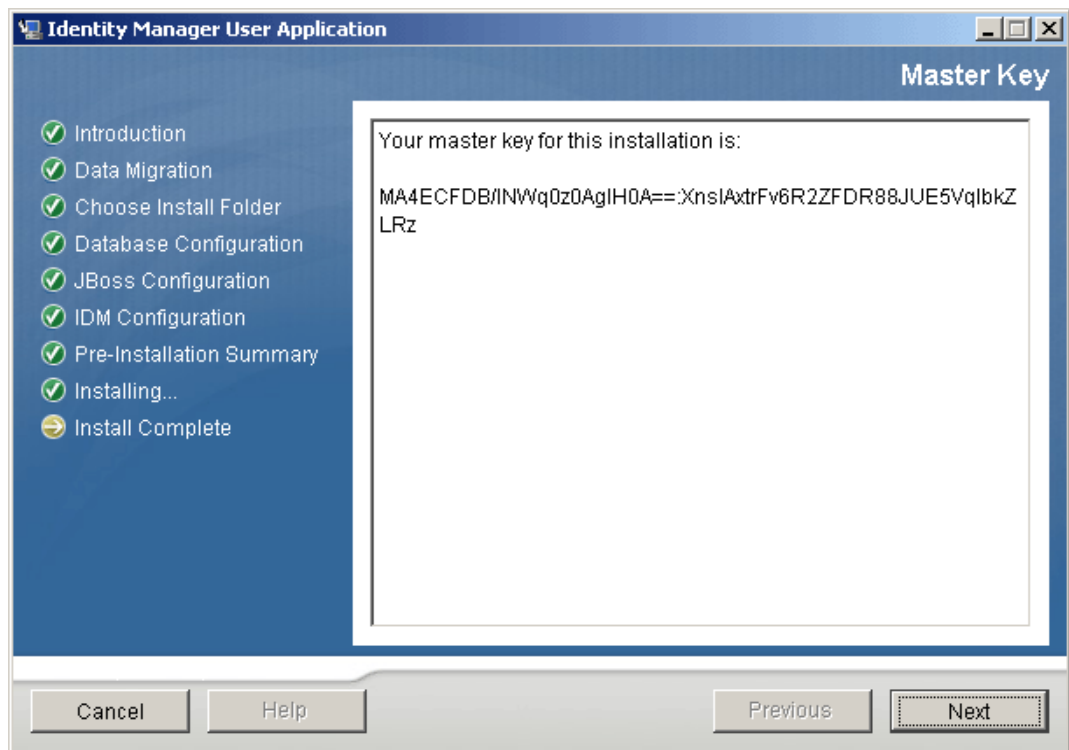
The Identity Manager User Application encrypts sensitive data (see [Section 2.2.7, “Encryption of Sensitive User Application Data,” on page 42](#)). A master key is used to access encrypted data. All User Applications in a cluster must use the same master key. Follow these steps to ensure that all User Applications in a cluster use the same master key.

- 1 Using the User Application installation program, install the User Application to the first node in the cluster.

For information about using the User Application installation program, see “Installing the User Application in the *Identity Manager 3.5 Installation Guide*.”

When you use the User Application installation program to install the first User Application in a cluster, at the end of the installation you are presented with a new master key for the User Application:

**Figure 2-5** Master Key

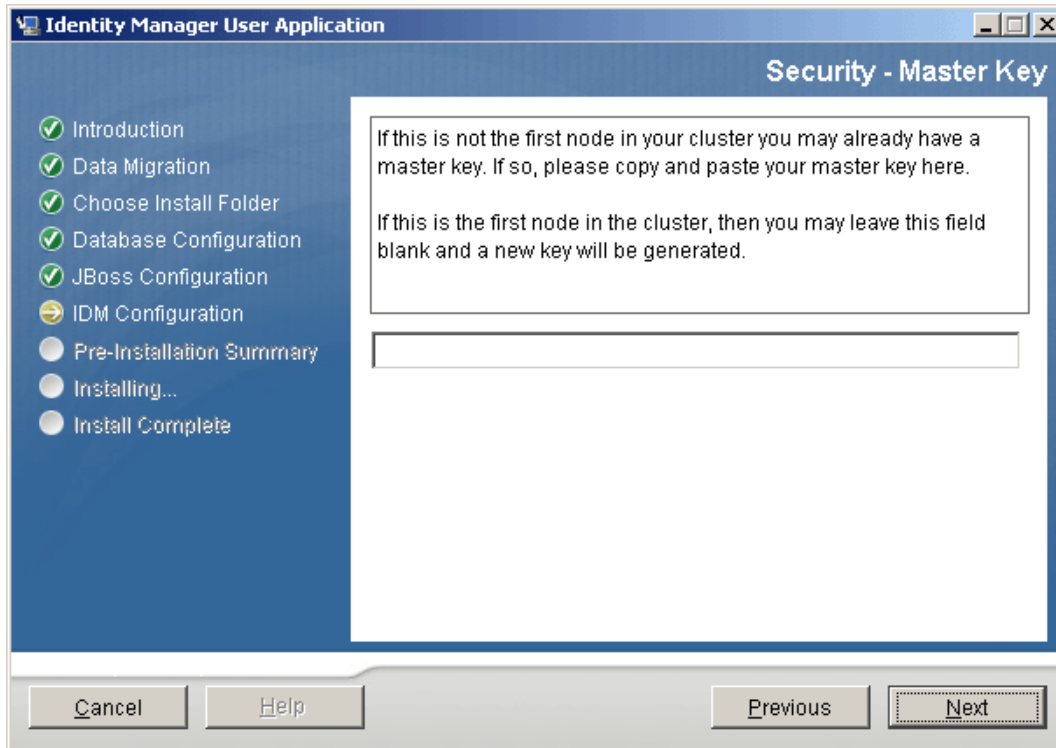


Follow the on-screen instructions to save the master key to a text file.

- 2 Using the User Application installation program, install the User Application to the other nodes in the cluster.

When you install the User Application to the other nodes in the cluster, the installation program provides a page that you use to import the master key:

**Figure 2-6** Pasting Master Key in User Application Installation Program

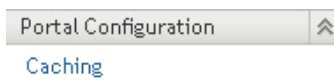


- 3 Import the master key that you saved to a text file in [Step 1 on page 64](#).

### Starting the User Application Cluster Group

After the User Applications in your cluster have been installed, you must enable the cluster in the User Application cluster configuration.

- 1 Start the first User Application in the cluster.
- 2 Log in as the User Application administrator.  
Don't start any other servers yet.
- 3 Click *Administration*.  
The User Application displays the Application Configuration portal.
- 4 Click *Caching*.



The *Caching Management* page is displayed.

- 5 Select *True* for the *Cluster Enabled* property.
- 6 Click *Save*.
- 7 Restart the server.

- 8 If you are using local settings (see “[Specifying the User Application Cluster Group Caching Configuration](#)” on page 68), repeat this procedure for each server in the cluster.

## 2.7.4 Installing the User Application to a WebSphere Cluster

This section outlines the process for installing and starting the User Application on a WebSphere cluster. This section assumes you are an experienced user of the WebSphere Application Server.

- 1 Install and configure your WebSphere Application Servers and cluster according to manufacturer’s instructions, such as those at the following links:

For information about application server setup, refer to:

- ♦ [IBM® WebSphere Application Server Library \(https://www-306.ibm.com/software/webservers/appserv/was/library/library60.html\)](https://www-306.ibm.com/software/webservers/appserv/was/library/library60.html). Choose the 6.1 tab, and *Show* the documentation for *WebSphere Application Server - distributed platforms*.
- ♦ [WebSphere Application Server, Version 6.1 Information Center \(http://publib.boulder.ibm.com/infocenter/wasinfo/v6r1/index.jsp\)](http://publib.boulder.ibm.com/infocenter/wasinfo/v6r1/index.jsp) For a road map, see *Network Deployment: (Distributed platforms and Windows), Version 6.1 > Installing your application serving environment > Distributed operating systems > Installing the product and additional software > Roadmap: Installing Network Deployment*.
- ♦ [IBM WebSphere Extended Deployment, Version 6.1 Information Center \(http://publib.boulder.ibm.com/infocenter/wxdinfo/v6r1/index.jsp\)](http://publib.boulder.ibm.com/infocenter/wxdinfo/v6r1/index.jsp)

- 2 Install and create a database according to manufacturer’s instructions. Enable the database for UTF-8.
- 3 Add and configure the database driver on a WebSphere server.
- 4 Create a JDBC Provider.
- 5 Create a data source for your relational database.
- 6 Run the User Application installer to install and configure the User Application on your WAS console system. Directions are in the *IDM 3.5.1 Installation Guide*, Chapter 5, “Installing the User Application.”

The installer writes the `sys-configuration-xmldata.xml` file to the directory you choose during installation.

- 7 In your post-installation tasks, while creating JVM Custom Properties in the WAS console as directed in the *IDM 3.5.1 Installation Guide*, create a new JVM Custom Property for each User Application server in the cluster. Name the Custom Property `com.novell.afw.wf.engine-id` and give it a unique value. Each User Application server runs a workflow engine, and each engine requires a unique engine ID.
- 8 Import the directory server certificate authority to the WebSphere keystore.
- 9 Deploy the IDM WAR file from the WebSphere administration console.
- 10 Start the application. Access the User Application portal using the context you specified during deployment. The default port for the web container on WebSphere is 9080, or 9443 for the secure port. The URL would look something like this:

```
http://<server>:9080/IDMProv
```

## 2.7.5 Things to Do After Installing the User Application

This section describes User Application cluster configuration actions that you perform after installing the User Application.

This section includes the following topics:

- ◆ “Configuring the User Application Driver for Clustering” on page 67
- ◆ “Specifying the User Application Cluster Group Caching Configuration” on page 68
- ◆ “Configuring Logging in a Cluster” on page 68
- ◆ “Managing Workflows in a Cluster” on page 69

### Configuring the User Application Driver for Clustering

Clustering is the only scenario in which the same User Application driver is used by multiple User Applications. The User Application driver stores various kinds of information (such as workflow configuration and cluster information) that is application-specific. Therefore, a single instance of the User Application driver should be not shared among multiple applications.

The User Application stores application-specific data to control and configure the application environment. This includes JBoss application server cluster information and the workflow engine configuration. The only User Applications that should share a single User Application driver instance are those applications that are part of the same JBoss cluster.

In a cluster, the User Application driver must be configured to use the host name or IP address of the dispatcher or load balancer for the cluster. You create the User Application driver when you install the User Application (see the *Novell Identity Manager Installation Guide*). You configure the User Application driver using iManager.

- 1 Log into the instance of iManager that manages your Identity Vault.
- 2 Click the *Identity Manager* node in the iManager navigation frame.
- 3 Click *Identity Manager Overview*.
- 4 Use the search page to display the Identity Manager Overview for the driver set that contains your User Application driver.
- 5 Click the round status indicator in the upper right corner of the driver icon:



A menu is displayed that lists commands for starting and stopping the driver, and editing driver properties.

- 6 Click *Edit Properties*.
- 7 In the *Driver Parameters* section, change the *Host* parameter to the host name or IP address of the dispatcher.
- 8 Click *OK*.

## Specifying the User Application Cluster Group Caching Configuration

Users who are familiar with JGroups and JBoss clustering can modify the cluster group caching configuration, using the User Application administration user interface (see “[Cache Settings for Clusters](#)” on page 97). Changes to the cluster configuration only take effect for a server node when the server node is restarted.

In most cases you should use global settings when configuring a cluster. However, global settings present a problem if you need to use TCP, because the IP address of the server must be specified in the JGroups initialization string for each server. You can use local settings to specify a JGroups initialization string by checking *Enable Local for Cluster Properties*, then typing the JGroups initialization string in the *Local* field. For an example of a working JGroups TCP protocol stack, see [JGroupsStackTCP](http://wiki.jboss.org/wiki/Wiki.jsp?page=JGroupsStackTCP) (<http://wiki.jboss.org/wiki/Wiki.jsp?page=JGroupsStackTCP>).

---

**WARNING:** If you specify local settings and enter an incorrect configuration in the JGroups initialization string, the cache cluster function might not start. Unless you know how to configure JGroups correctly and understand the protocol stack, you should not use local settings.

---

Alternatively, you can add a token (for example, “IDM\_HOST\_ADDR”) to the global settings for the *Cluster Properties*. You can then edit the `hosts` file on each server in the cluster to specify the IP address for that server.

## Configuring Logging in a Cluster

This section includes tips for configuring logging in a cluster. No tips are included for WebSphere.

- ◆ “[JBoss Logging](#)” on page 68
- ◆ “[User Application Logging](#)” on page 69

### JBoss Logging

You can configure JBoss for logging in a cluster. To enable logging for clusters, you need to edit the `jboss-log4j.xml` configuration file, located in the `\conf` directory for the JBoss server configuration (for example, `\server\IDM\conf`), and uncomment the section at the bottom that looks like this:

```
<!-- Clustering logging
-->
- <!--
  Uncomment the following to redirect the org.jgroups and
  org.jboss.ha categories to a cluster.log file.
  <appender name="CLUSTER"
class="org.jboss.logging.appender.RollingFileAppender">
  <errorHandler
class="org.jboss.logging.util.OnlyOnceErrorHandler"/>
  <param name="File" value="\${jboss.server.home.dir}/log
cluster.log"/>
  <param name="Append" value="false"/>
  <param name="MaxFileSize" value="500KB"/>
  <param name="MaxBackupIndex" value="1"/>
  <layout class="org.apache.log4j.PatternLayout">
    <param name="ConversionPattern" value="%d %-5p [%c] %m%n"/>
  </layout>
</appender>
```



```

<category name="org.jgroups">
  <priority value="DEBUG" />
  <appender-ref ref="CLUSTER"/>
</category>
<category name="org.jboss.ha">
  <priority value="DEBUG" />
  <appender-ref ref="CLUSTER"/>
</category>
-->

```

You can find the `cluster.log` file in the `log` directory for the JBoss server configuration (for example, `\server\IDM\log`).

## User Application Logging

The User Application logging configuration (see [Section 5.1.4, “Logging Configuration,” on page 102](#)) is not propagated to all servers in cluster. For example, if you use the Logging administration page on a server in a cluster to set the logging level for `com.novell.afw.portal.aggregation` to Trace, this setting is not propagated to the other servers in the cluster. You must individually configure the level of logging messages for each server in the cluster.

## Managing Workflows in a Cluster

The Identity Manager User Application workflow cluster implementation binds process instances to the engine on which they started. This is done by associating a workflow process instance with an engine-id and is maintained in the cluster database. When a workflow engine is started, it resumes process instances that are assigned to its engine-id. This prevents multiple engines in a cluster from resuming the same process instance. If a workflow engine fails, processes that were running on that engine are automatically resumed on another engine in the cluster.

You can manually reassign processes to other engines in the cluster. For example, an administrator could reassign processes back to a failed workflow engine when the workflow engine is brought back online, or redistribute processes to other engines when an engine is permanently removed from the cluster (see [Section 18.2.7, “Managing Workflow Processes in a Cluster,” on page 335](#)).

When the workflow engine starts up it checks to see if its engine ID is already in use by another node in the cluster. When this is the case, the workflow engine checks the cluster database to see if the status of the engine is SHUTDOWN or TIMEDOUT. If it is, the workflow engine starts. If the status is STARTING or RUNNING, the workflow engine logs a warning, then waits for a heartbeat time out to occur. If the heartbeat time out occurs, that means that the other workflow engine with the same ID was not shut down properly, so it's safe to start. If the heartbeat timer is updated, that means another workflow engine with the same ID is running in the cluster, so the workflow engine cannot start. You can specify the heartbeat time out (the maximum elapsed time between heartbeats before a workflow engine is considered timed out) by setting the *Heartbeat Interval* and *Heartbeat Factor* properties in the User Application (see [Section 8.4.2, “Configuring the Workflow Cluster,” on page 199](#)).

## 2.8 Localizing Text

Identity Manager provides a number of tools for localizing the User Application. This section provides a convenient reference for finding the information that you need to localize in the User Application.

**Table 2-5** Localization Topics

Localization topic:	Where to find it:
Set preferred locale for User Application	See the sections “Preferred Locale” and “Choosing a Preferred Language” in the <i>Identity Manager User Application: User Guide</i> ( <a href="http://www.novell.com/documentation/idm35/index.html">http://www.novell.com/documentation/idm35/index.html</a> ).
E-mail templates	See <b>Section 18.4.4, “Adding Localized E-Mail Templates,”</b> on page 350.
Challenge questions	See “Security: Best Practices” in the <i>Novell Identity Manager Administration Guide</i> .
Password sync status application name	See <b>Table 5-14, “Password Sync Status Application Settings,”</b> on page 134.
Names of container pages	See the <i>Page Name</i> property in <b>Section 6.2.1, “Creating Container Pages,”</b> on page 148.
Names of shared pages	See <b>Section 6.3.1, “Creating Shared Pages,”</b> on page 156.
Portlet preferences	See <b>Section 7.3.5, “Modifying Preferences for Portlet Registrations,”</b> on page 183.
Provisioning request definitions created in iManager	See <b>Section 17.3.2, “Creating or Editing a Provisioning Request,”</b> on page 304.
Provisioning team definitions	<b>Section 19.2.2, “Creating or Editing a Provisioning Team,”</b> on page 355.
General information about localizing display labels in directory abstraction layer objects and provisioning request definitions in Designer	See the section “Localizing Display Labels” in the <i>Identity Manager 3.5.1 User Application: Design Guide</i> .
Entity display labels	See the section “Adding Entities” in the <i>Identity Manager 3.5.1 User Application: Design Guide</i> .
Display labels for global lists	See the section “Working with Lists” in the <i>Identity Manager 3.5.1 User Application: Design Guide</i> .
Display labels for relationship properties	See the section “Relationship Properties” in the <i>Identity Manager 3.5.1 User Application: Design Guide</i> .
Digital signature declaration strings	See the section “Creating a Signature Declaration” in the <i>Identity Manager 3.5.1 User Application: Design Guide</i> .
Workflow activity display names	See the section “Workflow Activity Reference” in the <i>Identity Manager 3.5.1 User Application: Design Guide</i> .

# Setting Up Logging

This section includes the following:

- ♦ [Section 3.1, “About Event Logging,” on page 71](#)
- ♦ [Section 3.2, “Logging to a Novell Audit or Sentinel Server,” on page 72](#)

## 3.1 About Event Logging

The Identity Manager User Application implements logging by using log4j, an open-source logging package distributed by The Apache Software Foundation. See [Logging Services \(http://logging.apache.org/log4j\)](http://logging.apache.org/log4j) for details. By default, event messages are logged to the system console and to the application server’s log file at logging level INFO and above. You can also configure the User Application to log to Novell<sup>®</sup> Audit. Events are logged to all activated loggers.

---

**IMPORTANT:** If you are logging to Novell Audit, review the [Novell Audit documentation \(http://www.novell.com/documentation/novellaudit20/index.html\)](http://www.novell.com/documentation/novellaudit20/index.html).

---

**WARNING:** You must use Novell Audit (or Sentinel) to preserve documents that you digitally sign. Digital signature documents are not stored with workflow data in the User Application database, but are stored in the logging database. You must enable logging to preserve these documents.

---

The log4j configuration settings are in

- ♦ `jboss-log4j.xml` in the install directory on a JBoss application server
- ♦ `log4j.xml` in the User Application WAR on a non-JBoss application server

### 3.1.1 About the Log Level Settings

Console logging involves synchronized writes. This means that logging can become a processor usage issue as well as a concurrency impedance. You can change the priority value default setting to ERROR, on a JBoss server, by modifying the setting in the `<installdir>/jboss/server/IDM/conf/jboss-log4j.xml`. Locate the root node that looks like this:

```
<root>
  <priority value="INFO"/>
  <appender-ref ref="CONSOLE"/>
  <appender-ref ref="FILE"/>
</root>
```

Change the priority value to:

```
<root>
  <priority value="ERROR"/>
```

```

        <appender-ref ref="CONSOLE"/>
        <appender-ref ref="FILE"/>
</root>

```

Assigning a value to the root ensures that any appenders that do not explicitly have a level assigned inherit the root's level.

### 3.1.2 Changing the User Application Log Level Settings

The User Application enables you to change the log level settings of individual loggers.

- 1 Log in to the User Application as the User Application Administrator.
- 2 Select the *Administration* tab.
- 3 Select the *Logging* link.
- 4 Change the *Log Level* of any logger.
- 5 To save the changes for application server restarts, select *Persist the logging changes*.
- 6 Click *Submit*.

The User Application logging configuration is saved in the file `idmuserapp_logging.xml`. On JBoss, the path is `<installdir>/jboss/server/IDM/conf/idmuserapp_logging.xml`.

## 3.2 Logging to a Novell Audit or Sentinel Server

To log to a Novell Audit or Sentinel server:

- 1 Add the Identity Manager application schema to the Novell Audit server as a log application
 

[Section 3.2.1, “Adding the Identity Manager Application Schema to your Novell Audit Server as a Log Application,” on page 73](#)

- 2 Configure the Novell Audit platform agent on your application server

The Platform Agent is required on any client that reports events to Novell Audit or Sentinel. You configure the platform agent through the `logevent` configuration file. This file provides the configuration information that the platform agent needs to communicate with the Novell Audit server. The default location for this file, on the application server, is:

- ♦ Linux: `/etc/logevent.conf`
- ♦ Windows: `<WindowsDir>/logevent.cfg` (Usually `c:\windows`)

Specify the following four properties:

**Loghost:** The IP address or DNS name of your Novell Audit or Sentinel server. For example:

`LogHost=xxx.xxx.xxx.xxx`

**LogJavaClassPath:** The location of the `lcache.jar` file `NauditPA.jar`. For example:

`LogJavaClassPath=/opt/novell/idm/NAuditPA.jar`

**LogCacheDir:** Specifies where `lcache` stores cache files. For example:

`LogCacheDir=/opt/novell/idm/naudit/cache`

**LogCachePort:** Specifies on which port lcache listens for connections. The default is 288, but in a Linux server, set the port number greater than 1000. For example:

```
LogCachePort=1233
```

**BigData** Specifies the maximum number of bytes that the client will allow. Larger amounts of logging data will be truncated. The default value is 3072 bytes, but you should change this to at least 8192 bytes to handle a typical form that has approximately 15 fields on a half page.

```
LogMaxBigData=8192
```

---

**IMPORTANT:** If your data is very large, you may want to increase this value. If you are logging events that include digital signatures, it is critical that the value of LogMaxBigData be large enough to handle the data being logged.

---

Specify any other settings needed for your environment.

---

**NOTE:** You must restart the Platform Agent any time you change the configuration.

---

For more information about the structure of the logevent configuration file, see the section on configuring [platform agents \(http://www.novell.com/documentation/novellaudit20/index.html\)](http://www.novell.com/documentation/novellaudit20/index.html) in the section on the logging system in the *Novell Audit Administration Guide*.

- 3 Enable Novell Audit logging. For more information, see [Section 3.2.2, “Enabling Audit Logging,” on page 74](#).

## 3.2.1 Adding the Identity Manager Application Schema to your Novell Audit Server as a Log Application

To configure Audit to use the Identity Manager User Application as a log application:

- 1 Locate the following file:

```
dirxml.lsc
```

This file is located in the Identity Manager User Application installation directory after the install, for example `/opt/novell/idm`.

- 2 Use a Web browser to access an iManager with the Novell Audit plug-in installed, and log in as an administrator.
- 3 Go to *Roles and Tasks > Auditing and Logging* and select *Logging Server Options*.
- 4 Browse to the Logging Services container in your tree and select the appropriate Audit Secure Logging Server. Then click *OK*.
- 5 Go to the *Log Applications* tab, select the appropriate Container Name, and click the *New Log Application* link.
- 6 When the New Log Application dialog box displays, specify the following:

---

For this setting	Do this
<i>Log Application Name</i>	Type any name that is meaningful for your environment
<i>Import LSC File</i>	Use the <i>Browse</i> button to select the <code>dirxml.lsc</code> file

---

Click *OK*. The *Log Applications* tab displays the added application name.

- 7 Click *OK* to complete your Novell Audit server configuration.

- 8 Make sure the status on the Log Application is set to ON. (The circle under the status should be green. If it is red, click it to switch it to ON.)
- 9 Restart the Novell Audit server to activate the new log application settings.

## 3.2.2 Enabling Audit Logging

To enable Novell Audit logging in your Identity Manager User Application:

- 1 Log in to the User Application as the User Application Administrator.
- 2 Select the *Administration* tab.
- 3 Select the *Logging* link.
- 4 Select the *Also send logging messages to NovellAudit* check box (near the bottom of the page).
- 5 To save the changes for any subsequent application server restarts, make sure *Persist the logging changes* is selected.
- 6 Click *Submit*.

## 3.2.3 Events That Are Logged

The Identity Manager User Application logs a set of events automatically from workflow, search, detail, and password requests. By default, the Identity Manager User Application automatically logs the following events to all active logging channels:

**Table 3-1** *Logged Events*

Event ID	Process	Event	Severity
31400	Detail portlet	Delete_Entity	Info
31401		Update_Entity	Info
31410	Change Password portlet	Change_Password_Failure	Error
31411		Change_Password_Success	Info
31420	Forgot Password portlet	Forgot_Password_Change_Failure	Error
31421		Forgot_Password_Change_Success	Info
31430	Search portlet	Search_Request	Info
31431		Search_Saved	Info
31440	Create portlet	Create_Entity	Info
31470	Digital Signature	Digital_Signature_Verification_Request	Info
31471		Digital_Signature_Verification_Failure	Error
31472		Digital_Signature_Verification_Success	Info

<b>Event ID</b>	<b>Process</b>	<b>Event</b>	<b>Severity</b>	
31520	Workflow	Workflow_Error	Error	
31521		Workflow_Started	Info	
31522		Workflow_Forwarded	Info	
31523		Workflow_Reassigned	Info	
31524		Workflow_Approved	Info	
31525		Workflow_Refused	Info	
31526		Workflow_Ended	Info	
31527		Workflow_Claimed	Info	
31528		Workflow_Unclaimed	Info	
31529		Workflow_Denied	Info	
31534		Workflow_Escalated	Info	
31535		Workflow_Reminder_Sent	Info	
31536		Digital_Signature	Info	
31537		Workflow_ResetPriority	Info	
3152A		Workflow_Completed	Info	
3152B		Workflow_Timedout	Info	
3152C		User_Message	Info	
31533		Workflow_Retracted	Info	
3152D		Provisioning	Provision_Error	Error
3152E			Provision_Submitted	Info
3152F	Provision_Success		Info	
31530	Provision_Failure		Error	
31531	Provision_Granted		Info	
31532	Provision_Revoked		Info	

Event ID	Process	Event	Severity
31450	Security Context	Create_Proxy_Definition_Success	Info
31451		Create_Proxy_Definition_Failure	Error
31452		Update_Proxy_Definition_Success	Info
31453		Update_Proxy_Definition_Failure	Error
31454		Delete_Proxy_Definition_Success	Info
31455		Delete_Proxy_Definition_Failure	Error
31456		Create_Delegatee_Definition_Success	Info
31457		Create_Delegatee_Definition_Failure	Error
31458		Update_Delegatee_Definition_Success	Info
31459		Update_Delegatee_Definition_Failure	Error
3145A		Delete_Delegatee_Definition_Success	Info
3145B		Delete_Delegatee_Definition_Failure	Error
3145C		Create_Availability_Success	Info
3145D		Create_Availability_Failure	Error
3145E		Delete_Availability_Success	Info
3145F		Delete_Availability_Failure	Error

### 3.2.4 Log Reports

If you log events to the Novell Audit database channel, you can run reports on the data. There are several ways to generate reports against data logged to a Novell Audit database:

- ♦ Use the Novell Audit Report application to run your own reports or to run the predefined reports described in [“Predefined Log Reports” on page 76](#).
- ♦ Write queries against the logged data by using iManager to select *Auditing and Logging > Queries*.
- ♦ Write your own SQL queries against the logged data.
- ♦ Produce Identity Manager reports in Sentinel (see [“Sentinel Reports” on page 79](#)).

The default Novell Audit table is called NAUDITLOG.

#### Predefined Log Reports

The following predefined log reports are created in Crystal Reports (.rpt) format for filtering data logged to the Novell Audit database:



Report Name	Description
Administrative Action	Shows all administrative actions initiated from the Identity Manager User Application portal. This report includes the administrator who initiated the action.  It excludes any administrative changes made using iManager or the Designer for Identity Manager.
Historical Approval Flow	Shows all approval flow activities for a specified time frame.
Resource Provisioning	Shows all provisioning activities, sorted by resource.
User Audit Trail	Shows all activity relating to a user. Activities include both provisioning and self-service activities.
Specific User Provisioning	Shows all provisioning activities for a specific user.
User Provisioning	Shows all provisioning activities, sorted by user.

The following graphic shows an example of the Specific User Audit Trail report:

Figure 3-1 Sample Audit Trail Report

## Novell® Audit Report for Identity Manager

### Specific User Audit Trail

**Report Period:** - 10/13/2005 8:51:32AM

**User ID:** ablake

Report Last Modified: 10/13/2005  
 Report Generated On: 10/13/2005  
 Total pages: 8

### Approval Flow

Workflow Event: fecedbe80a3d4abd83c9476a1b576ea2			
Date / Time	Action	Initiator ID	
9/12/2005 3:20:42PM	Workflow Started	cn=ablake,ou=users,ou=idm sample-Jeff,o=novell	
9/12/2005 3:20:43PM	Workflow Forwarded	Workflow Administrator	
9/12/2005 3:25:43PM	Workflow Reassigned	Unclaimed	
9/12/2005 3:30:44PM	Workflow Forwarded	Workflow Administrator	
9/12/2005 3:30:44PM	Workflow Ended	Workflow Administrator	
9/12/2005 3:30:44PM	Workflow Denied	System	

Workflow Event: fc6d74b1268243b3beac52261439dea0			
Date / Time	Action	Initiator ID	
9/28/2005 1:12:19PM	Workflow Started	cn=ablake,ou=users,ou=idm sample-Jeff,o=novell	
9/28/2005 1:12:22PM	Workflow Forwarded	Workflow Administrator	
9/28/2005 2:12:23PM	Workflow Forwarded	Workflow Administrator	
9/28/2005 2:12:23PM	Workflow Forwarded	Workflow Administrator	
9/28/2005 2:12:23PM	Workflow Forwarded	Workflow Administrator	
9/28/2005 2:12:23PM	Workflow Forwarded	Workflow Administrator	
9/28/2005 2:12:23PM	Workflow Forwarded	Workflow Administrator	
9/28/2005 2:12:23PM	Workflow Approved	System	
9/28/2005 2:12:23PM	Workflow Approved	System	
9/28/2005 2:12:23PM	Workflow Completed	Workflow Administrator	
9/28/2005 2:12:27PM	Workflow Forwarded	Workflow Administrator	
9/28/2005 2:12:27PM	Workflow Ended	Workflow Administrator	
9/28/2005 2:12:27PM	Provision Submitted	Workflow Administrator	
9/28/2005 2:12:27PM	Provision Granted	Workflow Administrator	

Workflow Event: efaa8304e07641edb9e6375a1a36e396			
Date / Time	Action	Initiator ID	
10/12/2005 11:58:13AM	Workflow Started	cn=ablake,ou=users,ou=idm sample-qatest,o=novell	
10/12/2005 11:58:13AM	Workflow Forwarded	Workflow Administrator	

Workflow Event: ea341eb11a824e669e356837745fe264			
Date / Time	Action	Initiator ID	
9/27/2005 4:24:44PM	Workflow Started	cn=m mackenzie,ou=users,ou=idm sample-Jeff,o=novell	
9/27/2005 4:24:44PM	Workflow Forwarded	Workflow Administrator	

Page 1 of 8
Specific User Audit Trail

The report files are in the following locations:

Platform	Location
Windows	/nt/dirxml/reports

You can use these reports as templates for creating custom reports in the Crystal Reports Designer or you can run the reports using Audit Report (`lreport.exe`), a Windows program supplied with Novell Audit. The predefined reports query data from the default Novell Audit log database named `naudit` and a database table named `nauditlog`. If your Novell Audit log database has a different name, use the *Set Datasource Location* menu item in Crystal Reports Designer to replace the `naudit` database name with the one in your environment.

For more information, see the section on working with reports in the Novell [Audit documentation](http://www.novell.com/documentation/novellaudit20) (<http://www.novell.com/documentation/novellaudit20>).

## Sentinel Reports

If you have configured the platform agent to send events to Sentinel, you can produce the following reports about Identity Manager events in Sentinel:

- ◆ `IDM_Administrative_Action_Report.rpt`
- ◆ `IDM_Historical_Approval_Flow_Report.rpt`
- ◆ `IDM_Password-Management.rpt`
- ◆ `IDM_Provisioning_Report_by_Top_10_DHNs.rpt`
- ◆ `IDM_Provisioning_Report_by_Top_10_DIPs.rpt`
- ◆ `IDM_Resource_Provisioning_Report.rpt`
- ◆ `IDM_Specific_User_Audit_Trail_Report.rpt`
- ◆ `IDM_Specific_User_Provisioning_Report.rpt`
- ◆ `IDM_Sync-vs-Reset.rpt`
- ◆ `IDM_User_Provisioning_Report.rpt`
- ◆ `IDM_Workflow_Stats_by_Top_10_DHNs.rpt`
- ◆ `IDM_Workflow_Stats_by_Top_10_DIPs.rpt`

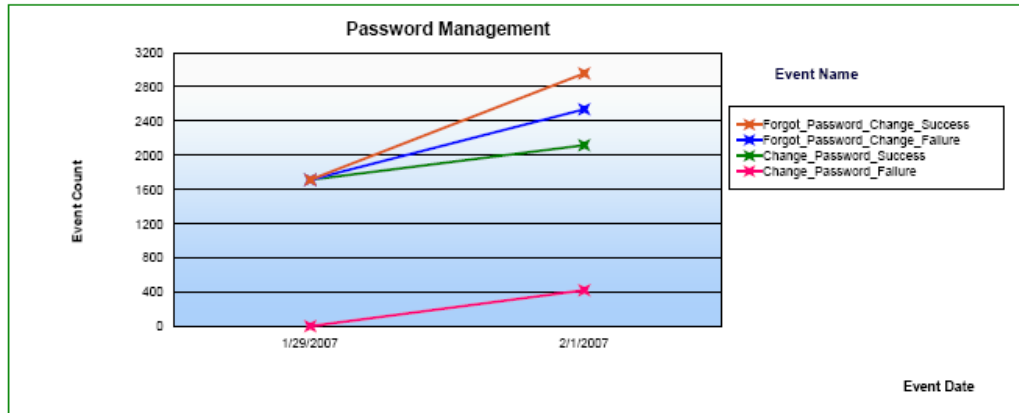
For more information about Sentinel reports, see the *Sentinel User's Guide*. The following is a sample Sentinel report on Password Management:

Figure 3-2 Sample Sentinel Report

**Password Management: 01/01/2005 - 03/01/2007**

Report Description : This report shows password related events count trend monitored by Sentinel Collectors. The graph below shows Daily event trend based on the total event count for the selected Date Range.

Report Period: 01-01-2005 12:00:00 AM - 03-01-2007 12:00:00 AM

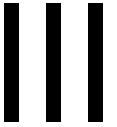


Below Cross Chart Summary indicates the total number of events related to Password Management by date-wise.

Password Management Event Count :

Event Date	Change_Password_Failure	Change_Password_Success	Forgot_Password_Change_Failure	Forgot_Password_Change_Success	Total
1/29/2007	1	1712	0	0	1713
2/1/2007	421	1698	420	420	2959

# Administering the User Application



These sections describe how to configure and manage the Identity Manager User Application by using the *Administration* tab of the user interface.

- ♦ [Chapter 4, “Using the Administration Tab,” on page 83](#)
- ♦ [Chapter 5, “Application Configuration,” on page 89](#)
- ♦ [Chapter 6, “Page Administration,” on page 139](#)
- ♦ [Chapter 7, “Portlet Administration,” on page 173](#)
- ♦ [Chapter 8, “Provisioning Configuration,” on page 189](#)
- ♦ [Chapter 9, “Security Configuration,” on page 201](#)



# Using the Administration Tab

This section introduces you to the *Administration* tab of the Identity Manager user interface. You'll learn how to use the *Administration* tab to configure and manage the Identity Manager User Application. Topics include:

- ♦ [Section 4.1, “About the Administration Tab,” on page 83](#)
- ♦ [Section 4.2, “Who Can Use the Administration Tab,” on page 83](#)
- ♦ [Section 4.3, “Accessing the Administration Tab,” on page 84](#)
- ♦ [Section 4.4, “Administration Actions You Can Perform,” on page 86](#)

## 4.1 About the Administration Tab

The Identity Manager user interface is primarily accessed by end users, who work with the tabs and pages it provides for identity self-service and workflow-based provisioning (with the Provisioning Module for Identity Manager). However, this browser-based user interface also provides an *Administration* tab and page, which administrators can use to access a page and configure various characteristics of the underlying Identity Manager User Application.

For example, choose the *Administration* tab to:

- ♦ Change the theme used for the look and feel of the user interface
- ♦ Customize the identity self-service features available to end users
- ♦ Specify who is allowed to perform administration actions
- ♦ Manage other details about the User Application and how it runs

## 4.2 Who Can Use the Administration Tab

The *Administration* tab is not visible to typical end users of the Identity Manager user interface. There are three kinds of users who can see and access this tab:

**User Application Administrators:** A User Application Administrator is authorized to perform all management functions related to the Identity Manager User Application. This includes accessing the *Administration* tab of the Identity Manager user interface to perform any administration actions that it supports. During installation, a user is specified as User Application Administrator. After installation, that user can use the Security page on the *Administration* tab to specify other User Application administrators, as needed. For details, see [Chapter 9, “Security Configuration,” on page 201](#).

**Provisioning Application Administrators:** A Provisioning Application Administrator is authorized to perform provisioning-related tasks for the Identity Manager User Application. During installation, a user is specified as Provisioning Application administrator. For details, see [Chapter 8, “Provisioning Configuration,” on page 189](#). The User Application administrator can use the Security page on the *Administration* tab to specify other Provisioning Application administrators. This includes performing the tasks on the Provisioning page of the *Administration* tab. For details, see [Chapter 9, “Security Configuration,” on page 201](#).

**Users permitted by User Application Administrator:** If necessary, a User Application Administrator can assign permission for one or more end users to see and access specific pages on the *Administration* tab. These permissions are assigned by using the Page Admin page on the *Administration* tab. For details, see [Chapter 6, “Page Administration,” on page 139](#)

## 4.3 Accessing the Administration Tab

When you are a User Application Administrator (or other permitted user), you can access the *Administration* tab of the Identity Manager user interface to manage the Identity Manager User Application. You just need a supported Web browser.

For a list of supported Web browsers, see the *Novell Identity Manager: Installation Guide*.

---

**NOTE:** To use the Identity Manager user interface, make sure your Web browser has JavaScript\* and cookies enabled.

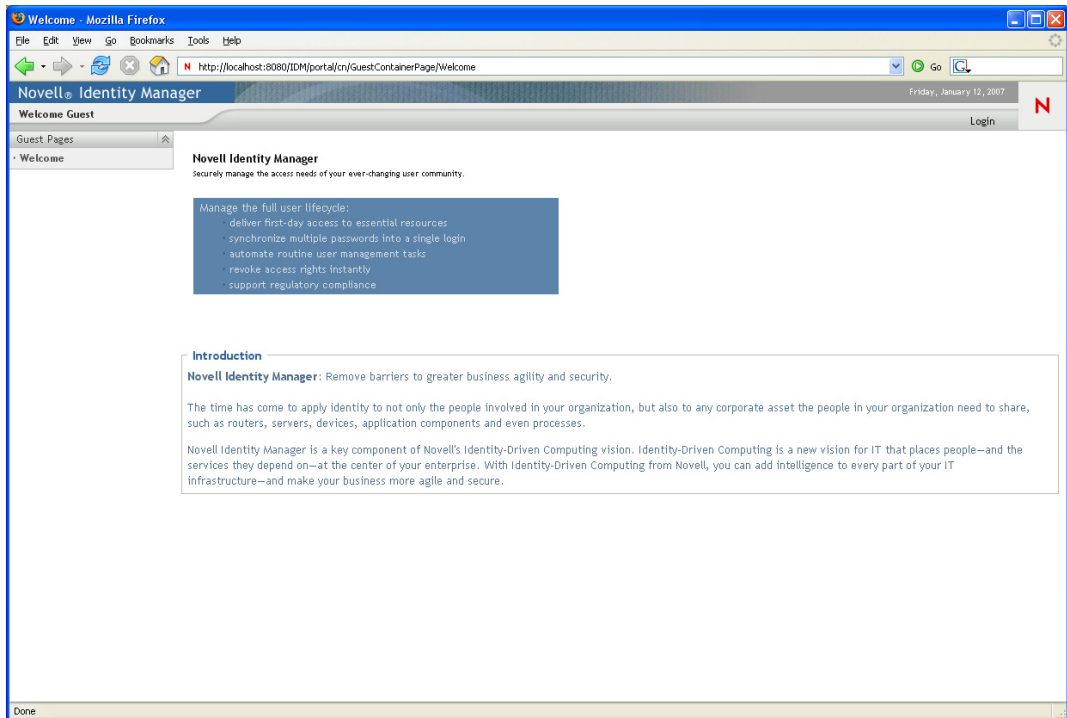
---

### To access the *Administration* tab:

- 1 In your Web browser, go to the URL for the Identity Manager user interface (as configured at your site). For example:

`http://myappserver:8080/IDM`

The Welcome Guest page of the user interface displays:



- 2 Click the *Login* link in the page header.



The user interface prompts you for a username and password:

The image shows a login form for Novell Identity Manager. The top section has a blue background with the text "Novell® Identity Manager" in white. Below this, there are two input fields: "Username:" and "Password:". Under the "Password:" field, there is a link that says "→ Forgot Password?". At the bottom left, there is a red "N" logo. At the bottom right, there is a button labeled "Login...".

Novell®  
Identity Manager

Username: Password:

→ [Forgot Password?](#)

**N** Login...

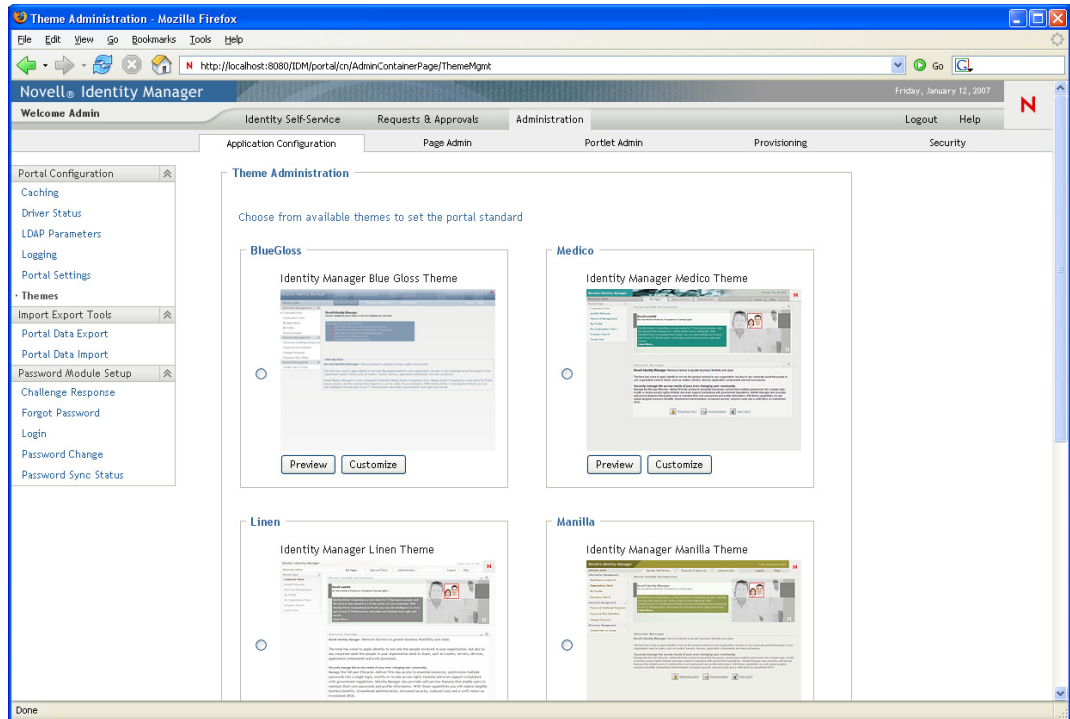
- 3 Specify the username and password of a User Application Administrator (or a user with some *Administration* tab permissions), then click *Login*.

After you log in, you see the appropriate user-interface content for that user.

By default, you are on the *Identity Self-Service* tab.

- 4 Click the *Administration* tab.

The *Administration* tab displays a menu of the administration actions you can perform. Each choice shows a corresponding page of settings and controls. By default, you see the Application Configuration page:



For more general information about accessing and working in the Identity Manager user interface, see the *Identity Manager User Application: User Guide*.

## 4.4 Administration Actions You Can Perform

After you're on the *Administration* page, you can use any available actions to configure and manage the Identity Manager User Application. [Table 4-1](#) contains a summary.

**Table 4-1** Administration Actions Summary

Action	Description
Application Configuration	Controls User Application configuration of caching, logging, password management, and LDAP connection parameters. Provides read-only information about the driver status and the portal. Provides access to tools that allow you to export or import portal content (pages and portlets used in the Identity Manager User Application).  For details, see <a href="#">Chapter 5, "Application Configuration,"</a> on page 89.
Page Admin	Controls the pages displayed in the Identity Manager user interface and who has permission to access them  For details, see <a href="#">Chapter 6, "Page Administration,"</a> on page 139.

---

Action	Description
Portlet Admin	Controls the portlets available in the Identity Manager user interface and who has permission to access them  For details, see <a href="#">Chapter 7, “Portlet Administration,” on page 173.</a>
Provisioning	Controls the configuration of delegation and proxy tasks, digital signature service and engine and cluster settings.  For details, see <a href="#">Chapter 8, “Provisioning Configuration,” on page 189.</a>
Security	Specifies who is a User Application Administrator and Provisioning Administrator for the Identity Manager User Application  For details, see <a href="#">Chapter 9, “Security Configuration,” on page 201.</a>



This section describes the tasks that you can perform from the Application Configuration page. It includes the following sections:

- ♦ [Section 5.1, “Portal Configuration Tasks,” on page 89](#)
- ♦ [Section 5.2, “Working with the Import and Export Tools,” on page 113](#)
- ♦ [Section 5.3, “Password Management Configuration,” on page 120](#)

## 5.1 Portal Configuration Tasks

This section includes information about:

- ♦ [Section 5.1.1, “Caching Management,” on page 89](#)
- ♦ [Section 5.1.2, “Driver Status,” on page 99](#)
- ♦ [Section 5.1.3, “LDAP Parameters,” on page 100](#)
- ♦ [Section 5.1.4, “Logging Configuration,” on page 102](#)
- ♦ [Section 5.1.5, “Portal Settings,” on page 107](#)
- ♦ [Section 5.1.6, “Theme Administration,” on page 107](#)

### 5.1.1 Caching Management

You can use the Caching page to manage various caches maintained by the Identity Manager User Application. The User Application employs these caches to store reusable, temporary data on the application server so it can optimize performance.

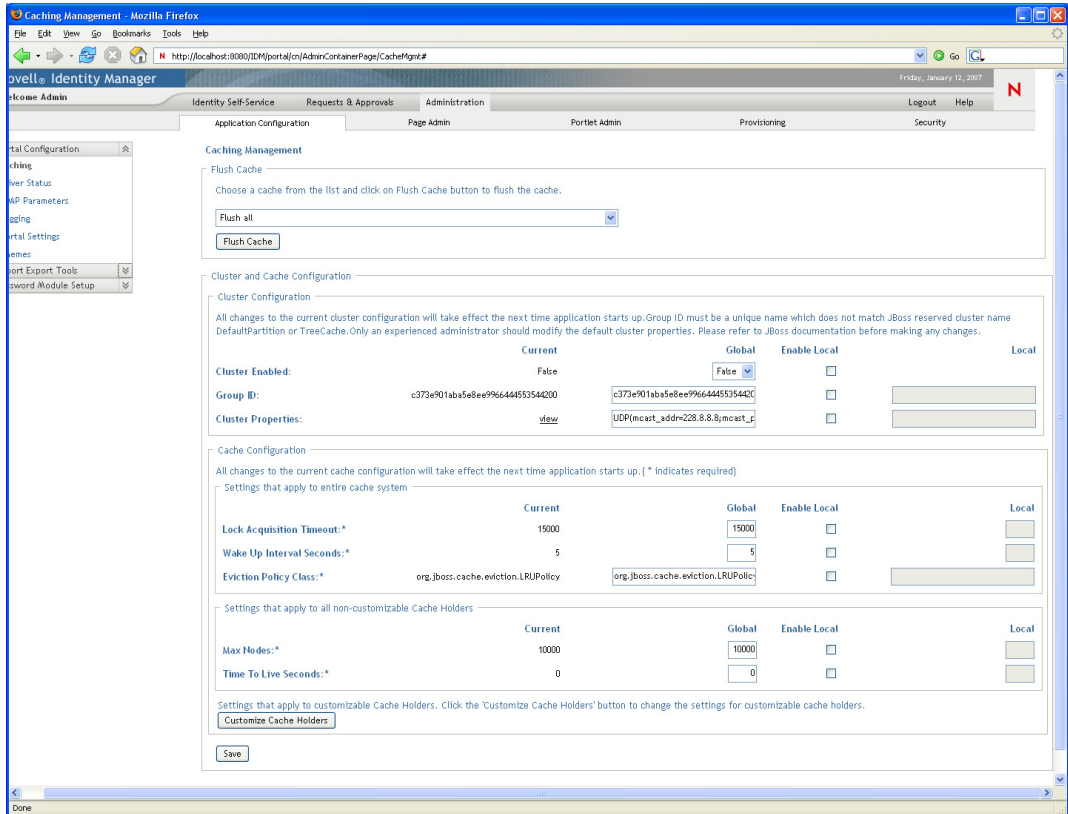
You have the ability to control these caches when necessary by flushing their contents and changing their configuration settings.

#### Flushing caches

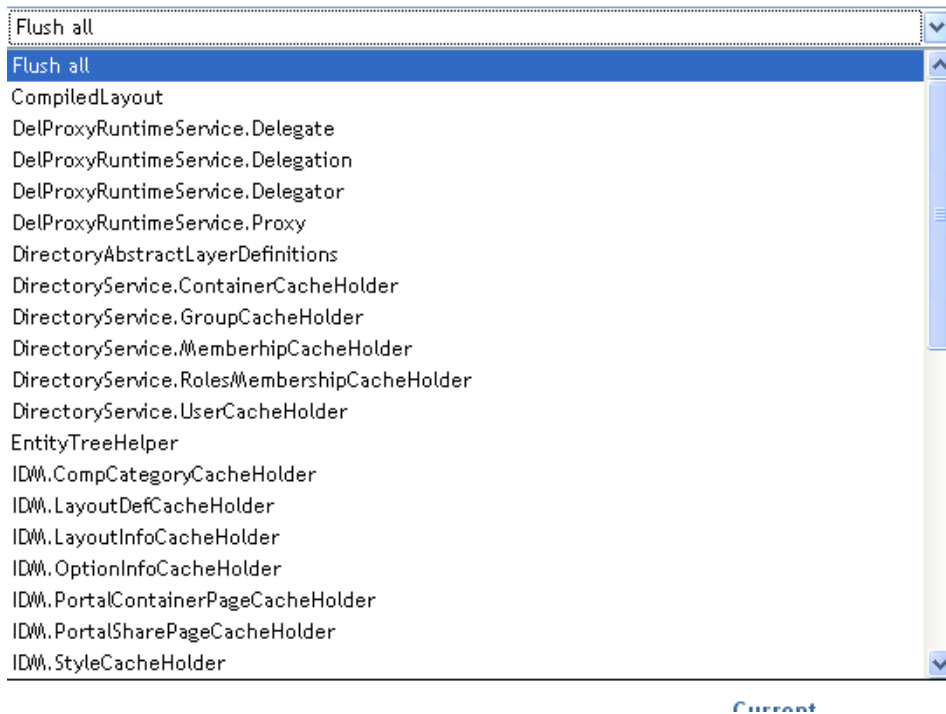
The caches are named according to the subsystems that use them in the Identity Manager User Application. Normally, you don't need to flush them yourself, because the User Application does

that automatically based on how frequently their data is used or when the source data changes. However, if you have a specific need, you can manually flush selected caches or all caches.

1 Go to the Caching page:



- 2 In the *Flush Cache* section of the page, use the drop-down list to select a particular cache to flush (or select *Flush all*):



The list of available caches is dynamic; it changes depending on what data is cached at the moment.

- 3 Click *Flush Cache*.

### Flushing the Directory Abstraction Layer Cache

The User Application's directory abstraction layer also has a cache. The `DirectoryAbstractLayerDefinitions` cache stores abstraction layer definitions on the application server to optimize performance for all data model operations.

In a typical situation, the User Application automatically keeps the `DirectoryAbstractLayerDefinitions` cache synchronized with the abstraction layer definitions stored in the Identity Vault. But, if necessary, you can manually flush the `DirectoryAbstractLayerDefinitions` cache as described in [“Flushing caches” on page 89](#) to force the latest definitions to be loaded from the Identity Vault.

For more information on the User Application's directory abstraction layer, see the *Identity Manager User Application: Design Guide*.

### Flushing Caches in a Cluster

Cache flushing is supported in both clustered and non-clustered application server environments. If your application server is part of a cluster and you manually flush a cache, that cache is automatically flushed on every server in the cluster.

## Configuring Cache Settings

You can use the Caching page to display and change cache configuration settings for a clustered or non-clustered application server environment. Your changes are saved immediately, but they don't take effect until the next User Application restart.

---

**TIP:** To restart the User Application, you can reboot the application server; redeploy the application (if the WAR has been changed in some way); or force the application to restart (as described in your application server's documentation).

---

### How Caching Is Implemented

In the Identity Manager User Application, caching is implemented via JBoss Cache. JBoss Cache is an open source caching architecture that's included with the JBoss Application Server but also runs on other application servers.

To learn more about JBoss Cache, go to [www.jboss.org/products/jboss-cache](http://www.jboss.org/products/jboss-cache) (<http://www.jboss.org/products/jboss-cache>).

### How Cache Settings Are Stored

Two levels of settings are available for controlling cache configuration: global, and local. Use these settings to customize the caching behavior of the Identity Manager User Application. [Table 5-1 on page 92](#) describes the cache configuration settings.

**Table 5-1** *Cache Configuration Settings*

Level	Description
Global settings	<p>Global settings are stored in a central location (the Identity Vault) so that multiple application servers can use the same setting values. For example, someone with a cluster of application servers would typically use global settings for the cluster configuration values.</p> <p>To find the global settings in your Identity Vault, look for the following object under your Identity Manager User Application driver:</p> <pre>configuration.AppDefs.AppConfig</pre> <p>For example:</p> <pre>configuration.AppDefs.AppConfig.MyUserApplicationDriver.MyDriverSet.MyOrg</pre> <p>The XmlData attribute of the configuration object contains the global settings data.</p>



Level	Description
Local setting	<p>Local settings are stored separately on each application server so that an individual server can override the value of one or more global settings. For example, you might want to specify a local setting to remove an application server from the cluster specified in the global settings, or to reassign a server to a different cluster.</p> <p>To find the local settings on your JBoss application server, look for the following file under your JBoss server configuration's <code>conf</code> directory: <code>sys-configuration-xmldata.xml</code>, for example <code>jboss/server/IDM/conf/sys-configuration-xmldata.xml</code>.</p> <p>To find the local settings on your WebSphere application server, look for the <code>sys-configuration-xmldata.xml</code> file at the location you specified in the <code>extend.local.config.dir</code> property that you set at installation.</p> <p>If your server has local settings, that data is contained in this file. (If no local settings have been specified, the file won't exist.)</p>

You should think of global settings as the default values for every application server that uses a particular instance of the User Application driver. When you change a global setting, you are affecting each of those servers (at the next User Application restart), except for those cases where an individual server specifies a local override.

## How Cache Settings Are Displayed

The Caching page displays the current cache settings (from the latest User Application restart). It also displays the corresponding global and local values of those settings, and lets you change them (for use at the next User Application restart).

Cluster and Cache Configuration

Cluster Configuration

All changes to the current cluster configuration will take effect the next time application starts up. Group ID must be a unique name which does not match JBoss reserved cluster name DefaultPartition or TreeCache. Only an experienced administrator should modify the default cluster properties. Please refer to JBoss documentation before making any changes.

	Current	Global	Enable Local	Local
Cluster Enabled:	False	False	<input type="checkbox"/>	
Group ID:	c373e901aba5e8ee9966444553544200	c373e901aba5e8ee9966444553544200	<input type="checkbox"/>	
Cluster Properties:	<a href="#">view</a>	UDP(mcast_addr=228.8.8.8;mcast_p	<input type="checkbox"/>	

Cache Configuration

All changes to the current cache configuration will take effect the next time application starts up. (\* indicates required)

Settings that apply to entire cache system

	Current	Global	Enable Local	Local
Lock Acquisition Timeout:*	15000	15000	<input type="checkbox"/>	
Wake Up Interval Seconds:*	5	5	<input type="checkbox"/>	
Eviction Policy Class:*	org.jboss.cache.eviction.LRUPolicy	org.jboss.cache.eviction.LRUPolic	<input type="checkbox"/>	

Settings that apply to all non-customizable Cache Holders

	Current	Global	Enable Local	Local
Max Nodes:*	10000	10000	<input type="checkbox"/>	
Time To Live Seconds:*	0	0	<input type="checkbox"/>	

Settings that apply to customizable Cache Holders. Click the 'Customize Cache Holders' button to change the settings for customizable cache holders.

[Customize Cache Holders](#)

The global settings always have values. The local settings are optional.

## Basic Cache Settings

These cache settings apply to both clustered and non-clustered application servers.

To configure basic cache settings:

- 1 Go to the Caching page.
- 2 In the *Cache Configuration* section of the page, specify global or local values for the following settings, as appropriate:

Setting	What to do
<i>Lock Acquisition Timeout</i>	Specify the time interval (in milliseconds) that the cache waits for a lock to be acquired on an object. You might want to increase this setting if the User Application gets a lot of lock timeout exceptions in the application log. The default is 15000 ms.
<i>Wake Up Interval Seconds</i>	Specify the time interval (in seconds) that the cache eviction policy waits before waking up to do the following: <ul style="list-style-type: none"><li>◆ Process the evicted node events</li><li>◆ Clean up the size limit and age-out nodes</li></ul>
<i>Eviction Policy Class</i>	Specify the classname for the cache eviction policy that you want to use. The default is the LRU eviction policy that JBoss Cache provides:  <code>org.jboss.cache.eviction.LRUPolicy</code>  If appropriate, you can change this to another eviction policy that JBoss Cache supports.  To learn about supported eviction policies, go to <a href="http://www.jboss.org/products/jbosscache">www.jboss.org/products/jbosscache</a> ( <a href="http://www.jboss.org/products/jbosscache">http://www.jboss.org/products/jbosscache</a> ).
<i>Max Nodes</i>	Specify the maximum number of nodes allowed in the cache. For no limit, specify:  0  You can customize this setting for some cache holders. See <a href="#">“Customizable Cache Holders” on page 95</a> .
<i>Time To Live Seconds</i>	Specify the time to idle (in seconds) before the node is swept away. For no limit, specify:  0  You can customize this setting for some cache holders. See <a href="#">“Customizable Cache Holders” on page 95</a> .
<i>Max Age</i>	Specifies the number of seconds an entry should be allowed to stay in the cache holder since its creation time. For no time limit, specify:  0  This setting is only available for <a href="#">“Customizable Cache Holders” on page 95</a> .

These settings are required, which means that there must be a global value for each, and optionally a local value too.

If you want to override the global value of a setting with a local value, select the *Enable Local* check box for that setting. Then specify the local value. (Make sure that all of your local values are valid. Otherwise, you won't be able to save your changes.)

---

**NOTE:** For those settings where *Enable Local* is deselected, any existing local values are deleted when you save.

---

- 3 Click *Save*.
- 4 When you're ready for your saved settings to take effect, restart the User Application on the applicable application servers.

### Customizable Cache Holders

You can customize the *Max Nodes*, *Time To Live*, and *Max Age* settings for some cache holders. The cache holders are listed in [Table 5-2](#).

**Table 5-2** Customizable Cache Holders

Cache Holder Name	Description
DirectoryAbstractionLayerDefinitions	Caches the Directory Abstraction Layer definitions to optimize performance for all data model operations. See <a href="#">"Flushing the Directory Abstraction Layer Cache"</a> on page 91.
DirectoryService.ContainerCacheHolder	Caches containers in the directory layer. Containers are shared by many users and groups, and reading them from the directory layer involves both network communication (with the LDAP server) and object creation. By default, the cache is limited to 50 containers, and the LRUs have a default Time To Live (TTL) of 10 minutes. Depending on the directory topography in your enterprise, you might need to adjust the maximum number of nodes or the TTL if you find the performance is suffering because of queries to the LDAP server for container objects. Making settings too high in combination with a large number of usable containers can cause unneeded memory consumption and net lower performance from the server.
DirectoryService.DelProxyRuntimeServiceDelegate	Caches delegate assignments.
DirectoryService.DelProxyRuntimeService.Delegation	Caches user availability settings.
DirectoryService.DelProxyRuntimeService.Delegator	Caches the delegator entities.
DirectoryService.DelProxyRuntimeService.Proxy	Caches proxy assignments.

Cache Holder Name	Description
DirectoryService.GroupCacheHolder	Caches groups in the directory layer. Groups are often shared by many users, and reading them from the directory layer involves both network communication (with LDAP server) and object creation. By default, the cache is limited to 500 groups, and the LRUs have a default TTL of 10 minutes. Depending on the user/group topography in your enterprise, you might need to adjust the maximum number of nodes or the TTL if you find the performance is suffering because of queries to the LDAP server for groups objects. Settings that are too high, in combination with a large number of usable groups, can cause unneeded memory consumption, and net lower performance from the server.
DirectoryService.MemberhipCacheHolder	Caches the relationship between a user and a set of groups. Querying the set of groups a user belongs to can be a network and CPU intensive operation on the LDAP server, especially if dynamic groups are enabled. For this reason, relationships are cached with an expiration interval so that changes in the criteria for inclusion/exclusion in a group (such as time-based dynamic groups) are reflected. The default Max Age is five minutes. However, if you use dynamic groups which have a requirement for finer grained time control, then you can adjust the Max Age on this cache holder to be just below the minimum time your finest grained time based dynamic group requires. The lower this value is, the more times the user's groups are queried during a session. Setting a value too high keeps the user/group relationships in memory perhaps longer than the user's session needlessly consuming memory.
DirectoryService.RolesMembershipCacheHolder	Caches the application role membership list by role.
DirectoryService.TeamManagerRuntime.Team	Caches the application team instances and team provisioning requests.

Cache Holder Name	Description
DirectoryService.UserCacheHolder	Caches users in the directory layer. Reading users from the directory layer involves both network communication (with LDAP server) and object creation. By default, the cache is limited to 1000 users, and the LRUs have a default TTL of 10 minutes. Depending on the user topography in your enterprise, you might need to adjust the maximum number of nodes or the TTL if you find the performance is suffering because of queries to the LDAP server for user objects. Making settings too high combined with a large number of different users logging in can cause unneeded memory consumption, and net lower performance from the server.
GlobalCacheHolder	The general purpose cache holder. This configuration applies to all caches that are not customizable (that is, all cache holders not listed in this table.)
JUICE	<p>Caches the resource bundles used by the user interface controls and DN display expression lookup results. Changing the setting of the cache holder has a performance impact for the DN display expression lookups because they are frequently used in the User Application.</p> <p>The low value should be at least 300 seconds, but a higher value than 900 seconds is ok. A lower value should be used if the customer is frequently changing the attributes that are used in the DN display expression</p>
RoleManager.RolesCacheHolder	Caches user role memberships listed by user.
Workflow.Model.Process	Caches the provisioning process XML object structure.
Workflow.Model.Request	Caches the provisioning request XML object structure.
Workflow.Provisioning	Caches provisioning request instances that have not completed. The default maximum capacity for the LRU cache is 500. The capacity can be modified by clicking the <i>Administration/Provisioning</i> tab and choosing the Engine and Cluster settings. The Process Cache Maximum Capacity appears on this page. This cache reduces the memory footprint for workflow processing without compromising performance.

## Cache Settings for Clusters

This section discusses how to configure caching when you run the Identity Manager User Application across a cluster of application servers.

In the Identity Manager User Application, cluster support for caching is implemented via *JGroups*. JGroups is an open-source clustering architecture that's included with the JBoss Application Server but also runs on other application servers.

The User Application's cluster consists of nodes on a network that run JGroups and use a common Group ID. By default, the Group ID provided for the User Application's cluster is a UUID that looks like this:

```
c373e901aba5e8ee9966444553544200
```

The UUID helps ensure uniqueness, so that the Group ID of the User Application's cluster doesn't conflict with the Group IDs of other clusters in your environment. For instance, the JBoss Application Server itself uses several JGroups clusters and reserves associated names including the Group IDs `DefaultPartition` and `Tomcat-Cluster` for them.

To learn more about JGroups, go to [www.jboss.org/products/jgroups](http://www.jboss.org/products/jgroups) (<http://www.jboss.org/products/jgroups>).

## How Caching Works with a Cluster

When you start the User Application, the application's cluster configuration settings on the *Caching* page determine whether to participate in a cluster and invalidates cache changes in the other nodes in that cluster. If clustering is enabled, the User Application accomplishes this by sending cache entry invalidation messages to each node as changes occur.

## Preparing to Use a Cluster

To use caching across a cluster:

- 1 Set up your JGroups cluster. This involves using the User Application installation program to install the Identity Manager User Application to each application server in the cluster (see [Section 2.7, "Clustering," on page 58](#)).
- 2 Enable the use of that cluster in the User Application's cache configuration settings. See ["Configuring Cache Settings for Clusters" on page 98](#).

## Configuring Cache Settings for Clusters

After you have a cluster ready to use, you can specify settings for the support of caching across that cluster.

- 1 Go to the Caching page.
- 2 In the *Cluster Configuration* section of the page, specify global or local values for the following settings, as appropriate:

Setting	What to do
<i>Cluster Enabled</i>	Select <i>True</i> to invalidate cache changes to the other nodes in the cluster specified by Group ID. If you don't want to participate in a cluster, select <i>False</i> .

Setting	What to do
<i>Group ID</i>	<p>Specify the Group ID of the JGroups cluster in which you want to participate. There's no need to change the default Group ID that's provided for the User Application's cluster, unless you want to use a different cluster.</p> <p>The Group ID must be unique and must not match any of the known JBoss cluster names such as DefaultPartition and Tomcat-Cluster.</p> <hr/> <p><b>TIP:</b> To see the Group ID in logging messages, make sure that the level of the caching log (<code>com.sssw.fw.cachemgr</code>) is set to Info or higher.</p>
<i>Cluster Properties</i>	<p>Specify the JGroups protocol stack for the cluster specified by Group ID. This setting is for experienced administrators who might need to adjust the cluster properties. Otherwise, you should not change the default protocol stack.</p> <p>To see the current cluster properties, click <i>view</i>.</p> <p>For details on the JGroups protocol stack, go to <a href="http://www.jboss.org/wiki/Wiki.jsp?page=JGroups">www.jboss.org/wiki/Wiki.jsp?page=JGroups</a> (<a href="http://www.jboss.org/wiki/Wiki.jsp?page=JGroups">http://www.jboss.org/wiki/Wiki.jsp?page=JGroups</a>).</p>

If you want to override the global value of a setting with a local value, select the *Enable Local* check box for that setting. Then specify the local value.

For those settings where *Enable Local* is unselected, any existing local values are deleted when you save.

Make sure that all nodes in your cluster specify the same Group ID and Cluster Properties. To see these settings for a particular node, you must access the Identity Manager user interface running on that node—by browsing to the URL of the user interface on that server—and then display the Caching page there.

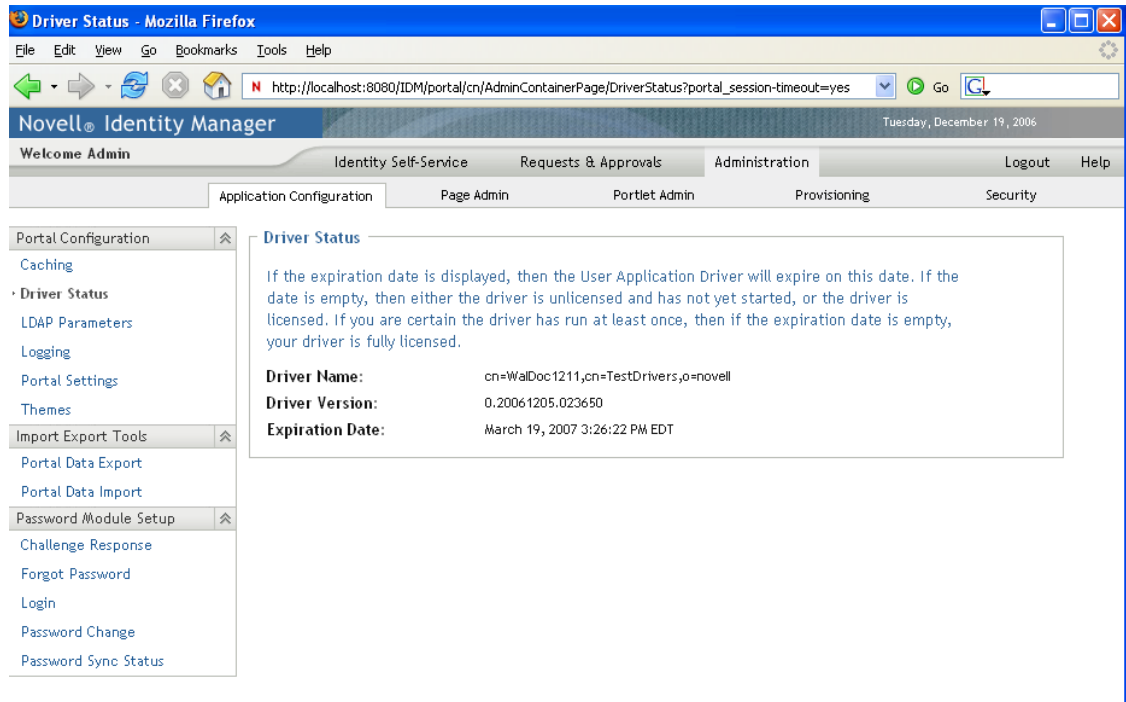
If you need to use the TCP protocol instead of the default UDP protocol, see “[Specifying the User Application Cluster Group Caching Configuration](#)” on page 68.

- 3 Click *Save*.
- 4 When you're ready for your saved settings to take effect, restart the User Application on the applicable application servers.

## 5.1.2 Driver Status

You can use the Driver Status pane to determine the expiration status of your driver.

**Figure 5-1** Sample Driver Status for a “Trial” Driver



An Expiration Date value of *No Expiration* means that the driver has been started and is fully licensed or has not yet been started. If it has not been started, it might also be a trial driver. If there is an expiration date, then the driver is a trial driver and it has been started. The page itself describes what values of UNKNOWN mean.

### 5.1.3 LDAP Parameters

You can use the LDAP Parameters pane to:

- ♦ Change the credentials used by the Identity Manager User Application when connecting to the Identity Vault (LDAP provider)
- ♦ Change the credentials for the guest account, if your system is configured to use a specific guest account, rather than LDAP anonymous account.
- ♦ View other LDAP properties of the Identity Manager User Application. The values of these settings are determined when you install the User Application.

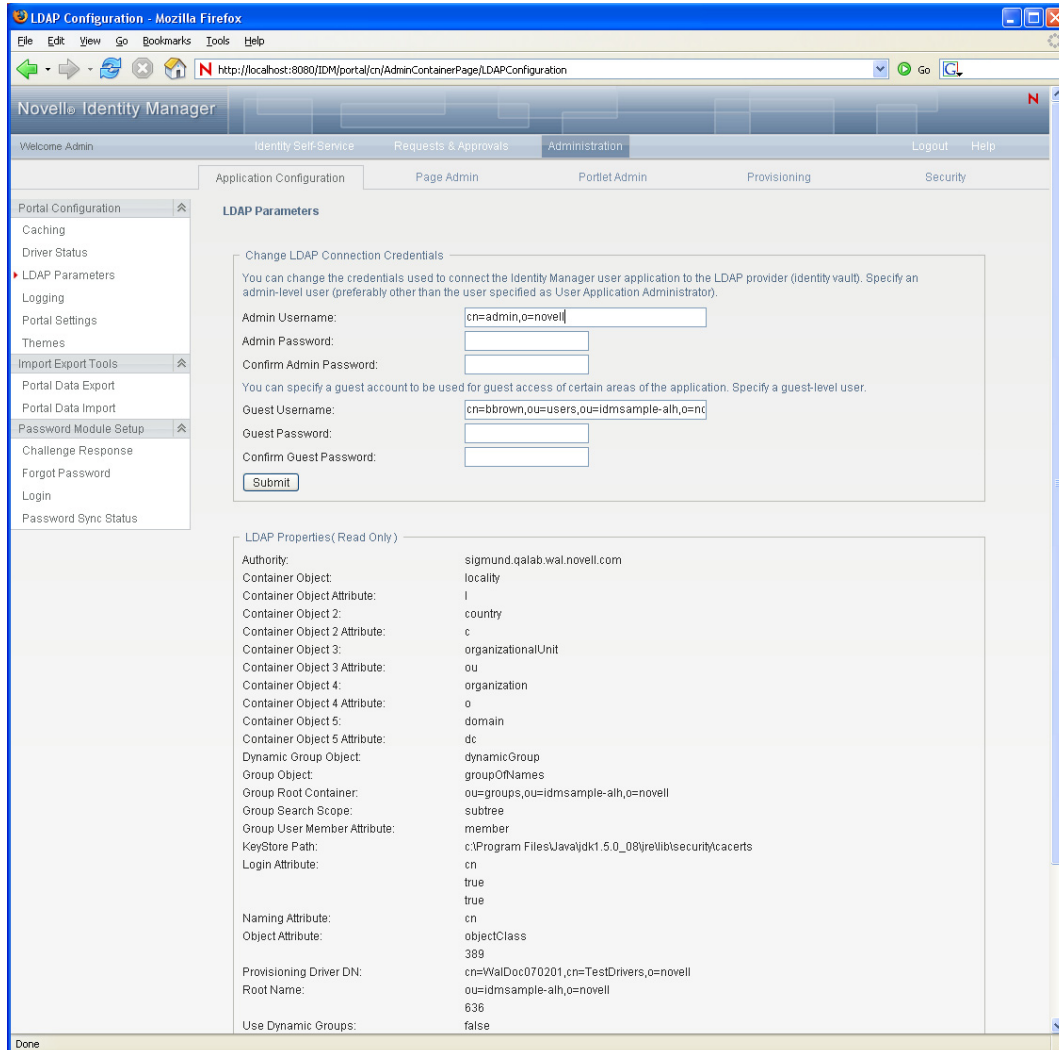
The user interface displays different fields depending on how you configured the guest account during installation. If you specified a guest account, the user interface includes fields that let you update the credentials for that account. If you have configured your system to use the LDAP Public Anonymous account, the user interface displays this message: The application is configured to use public anonymous account. To use a specific guest account, enable the guest account using the ldap configuration tool.

To administer LDAP connection parameters:

- 1 On the Application Configuration page, select *LDAP Connection Parameters* from the navigation menu on the left.



The LDAP Connection Parameters panel displays:



- 2 Examine and modify the settings, as appropriate. For details, see: [“Settings You Can Change” on page 101](#).
- 3 If you make changes that you want to apply, click *Submit*.

## Settings You Can Change

On the LDAP Connection Parameters panel, you can modify settings for the credentials for:

- ♦ The Identity Manager User Application whenever it connects to the Identity Vault (LDAP provider).
- ♦ The guest account (if configured).

The initial values for the credentials are specified during installation. These installation values are written to the `sys-configuration-xmldata` file. If you make changes to these credentials via the Administration page, your changes are saved to the User Application’s database; they are not saved to the `sys-configuration-xmldata` file. After values are written to the database, the User Application no longer checks the values written to the `sys-configuration-xmldata` file. This means that you

cannot use the `configupdate` utility to change the credentials because they are ignored. However, you can use `configupdate` to change the type of guest user (LDAP Guest or Public Anonymous Account).

**Table 5-3** *LDAP Parameters*

Setting	What to do
Admin Username	<p>Type the name of a user who has full administrator rights in the Identity Vault. The Identity Manager User Application needs to access the Identity Vault as an administrator in order to function.</p> <p>It is typical to specify the Identity Vault's <code>root</code> administrator as the LDAP connection username. The <code>root</code> administrator has full control over the tree, so you need not assign any special trustee rights.</p> <p>For example:</p> <pre>cn=admin,o=myorg</pre> <p>If you specify some other user, you need to assign inheritable trustee rights to the properties [All Attributes Rights] and [Entry Rights] on your User Application driver.</p> <hr/> <p><b>NOTE:</b> To avoid confusion, it is recommended that you do not specify the User Application's User Application Administrator as the LDAP connection username. It is best to use separate accounts for these two different purposes.</p>
Admin Password	Type the password that is currently set for that username in the Identity Vault.
and	
Confirm Password	
Guest Username	Type the guest user's distinguished name
Confirm Guest Password	Type the password for the guest user.

If TLS is enabled for your LDAP server, you might encounter the following error when you update the Admin username and password: `Unable to authenticate to LDAP Provider. Disable this error by disabling TLS via iManager.`

## 5.1.4 Logging Configuration

You can use the Logging page to control the levels of logging messages you want the Identity Manager User Application to generate and specify whether those messages are sent to Novell® Audit.

The Identity Manager User Application implements logging by using `log4j`, an open-source logging package distributed by The Apache Software Foundation. By default, event messages are logged to both of the following:

- ◆ The system console of the application server where the Identity Manager User Application is deployed
- ◆ A log file on that application server, for example:

jboss/server/IDM/log/server.log

This is a rolling log file; after it reaches a certain size, it rolls over to another file. If you have configured your environment to include Novell Audit, you have the option of logging event messages there as well. For details on configuring your logging environment and Novell Audit, see [Chapter 3, “Setting Up Logging,” on page 71](#).

## About the Logs

The Logging page lists a variety of logs, each outputting event messages from a different part of the Identity Manager User Application. Each log has its own independent output level.

The log names are based on log4j conventions. You’ll see these log names in the event messages that are generated, indicating the context of the message output.

[Table 5-4 on page 103](#) lists and describes the logs.

**Table 5-4** Identity Manager User Application Logs

Log Name	Description
com.novell	Parent of other Identity Manager User Application logs
com.novell.afw.portal.aggregation	Messages related to portal page processing
com.novell.afw.portal.persist	Messages related to the persistence of portal data (including portal pages and portlet registrations)
com.novell.afw.portal.portlet	Messages from the portal core portlets and accessory portlets
com.novell.afw.portal.util	Messages from the portal import/export and navigation portlets
com.novell.afw.portlet.consumer	Messages related to portlet rendering
com.novell.afw.portlet.core	Messages related to the core portlet API
com.novell.afw.portlet.persist	Messages related to the persistence of portlet data (including portlet preferences and setting values)
com.novell.afw.portlet.producer	Messages related to the registration and configuration of portlets within the portal
com.novell.afw.portlet.util	Messages related to utility code used by portlets
com.novell.afw.theme	Messages from the theme subsystem
com.novell.afw.util	Messages related to portal utility classes
com.novell.soa.af.impl	Messages from the approval flow (provisioning workflow) subsystem
com.novell.srvprv.apwa	Messages from the Requests & Approvals Web application (actions and tags)
com.novell.srvprv.impl.portlet.core	Messages from the core identity portlets and password portlets

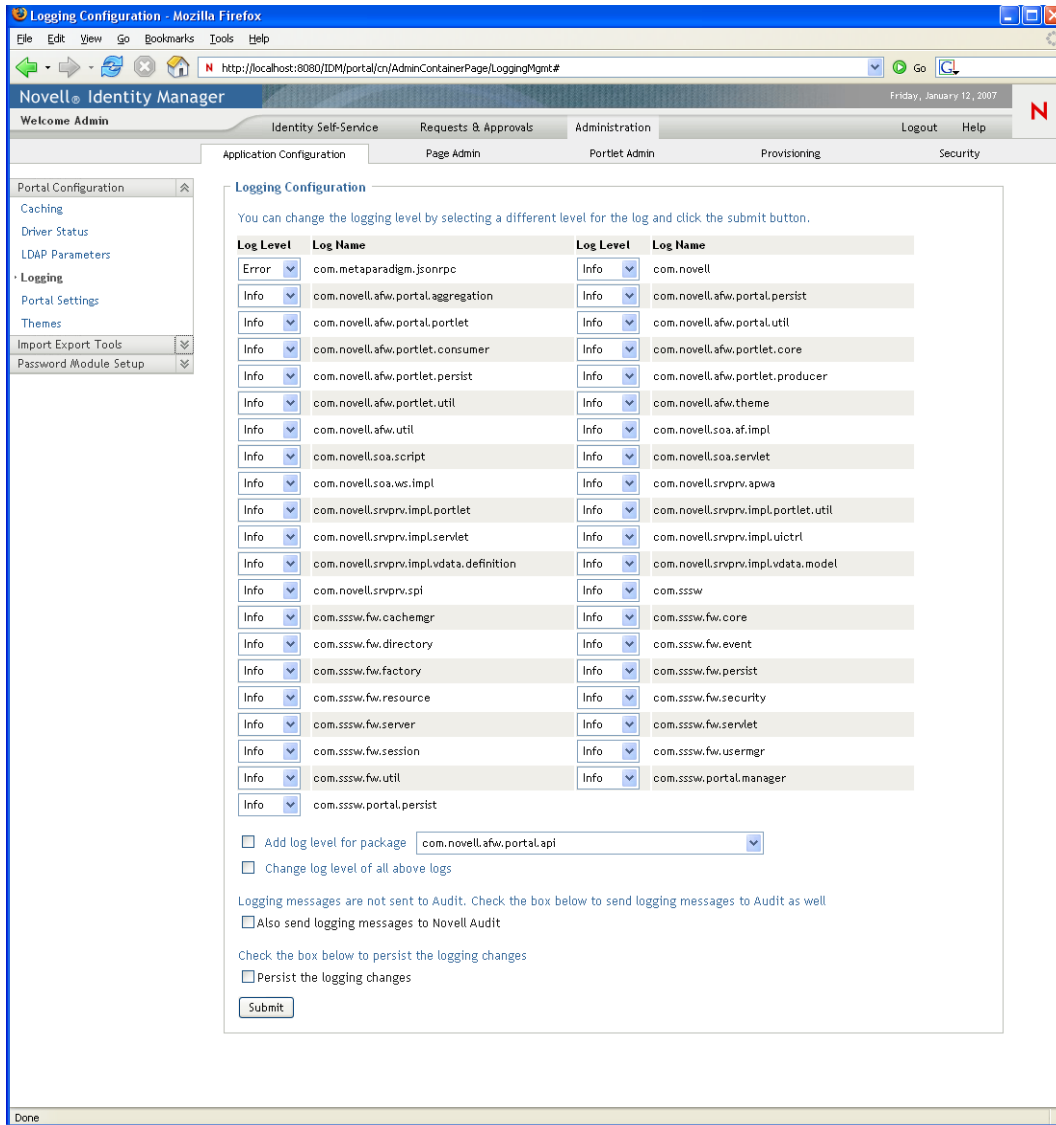
<b>Log Name</b>	<b>Description</b>
<code>com.novell.srvprv.impl.portlet.util</code>	Messages from the identity-related utility portlets
<code>com.novell.srvprv.impl.servlet</code>	Messages from the UI control framework's ajax servlet and ajax services
<code>com.novell.srvprv.impl.uictrl</code>	Messages from the UI control registry API and approval form rendering
<code>com.novell.srvprv.impl.vdata</code>	Messages from the directory abstraction layer
<code>com.novell.srvprv.spi</code>	Messages from the UI control registry API
<code>com.sssw.fw.cachemgr</code>	Messages related to the framework cache subsystem
<code>com.sssw.fw.core</code>	Messages related to the framework core subsystem
<code>com.sssw.fw.directory</code>	Messages related to the framework directory subsystem
<code>com.sssw.fw.event</code>	Messages related to the framework event subsystem
<code>com.sssw.fw.factory</code>	Messages related to the framework factory subsystem
<code>com.sssw.fw.persist</code>	Messages related to the framework persistence subsystem
<code>com.sssw.fw.resource</code>	Messages related to the framework resource subsystem
<code>com.sssw.fw.security</code>	Messages related to the framework security subsystem
<code>com.sssw.fw.server</code>	Messages related to the framework server subsystem
<code>com.sssw.fw.servlet</code>	Messages related to the framework servlet subsystem
<code>com.sssw.fw.session</code>	Messages related to the framework session subsystem
<code>com.sssw.fw.usermgr</code>	Messages related to the framework user subsystem
<code>com.sssw.fw.util</code>	Messages related to the framework utility subsystem
<code>com.sssw.portal.manager</code>	Messages related to the Portal Manager
<code>com.sssw.portal.persist</code>	Messages related to portal persistence

The User Application logs are hierarchical. For example, `com.novell` is the parent of other logs underneath it. Any additional logs inherit its properties.

## Changing Log Levels

You can control the amount of information that is written to a particular log by changing the level that is set for it. By default, all logs are set to *Info*, which is an intermediate level.

- 1 Go to the Logging page:



- 2 At the top of the page, find a log whose level you want to change.
- 3 Use the drop-down list to select one of the following levels:

Level	Description
Fatal	The least detail. Writes fatal errors to the log.
Error	Writes errors (plus all of the above) to the log.
Warn	Writes warnings (plus all of the above) to the log.

Level	Description
Info	Writes informational messages (plus all of the above) to the log.
Debug	Writes debugging information (plus all of the above) to the log.
Trace	The most detail. Writes tracing information (plus all of the above) to the log.

4 Repeat **Step 2** and **Step 3** for other logs, as needed.

5 Click *Submit*.

You can change the log level for all of the logs to one setting by selecting *Change log level* of all above logs and using the drop-down list to select the level.

## Adding Logs for Other Packages

You can add logs for other packages used by the User Application.

- 1 Go to the Logging page:
- 2 At the bottom of the page, select *Add Log Level for Package*, then use the drop-down list to select the package.
- 3 Choose a log level from the drop-down, then click *Submit*.

## Sending Log Messages to Novell Audit

You can use the Logging page to control whether the Identity Manager User Application sends event message output to Novell Audit. Novell Audit logging is off by default, unless you turn it on when installing the User Application.

To toggle Novell Audit logging on/off:

- 1 Go to the Logging page.
- 2 Select or deselect the following setting, as appropriate: *Also send logging messages to Audit*.
- 3 Click *Submit*.

## Persisting Your Log Settings

By default, changes you make on the Logging page stay in effect until the next application-server restart or User Application redeployment. After that, the log settings revert to their default values.

However, the Logging page does offer you the option of persisting your changes to its settings. If you turn on this feature, values for the log settings are stored in a logging configuration file on the application server where the Identity Manager User Application is deployed. For example:

- ◆ On JBoss, this file is  
`jboss/server/IDM/conf/idmuserapp_logging.xml`
- ◆ On WebSphere, this file is specified according to the custom property named `idmuserapp.logging.config.dir`.

To toggle persistence of settings on or off:

- 1 Go to the Logging page.
- 2 Select or deselect the following setting, as appropriate: *Persist the logging changes*

3 Click *Submit*.

## 5.1.5 Portal Settings

You can use the Portal page to view characteristics of the Identity Manager User Application. The settings are for informational purposes and cannot be changed. The values of these settings are set in the User Application WAR. (*Default Theme* reflects your current theme choice from the Themes page.)

## 5.1.6 Theme Administration

You can use the Themes page to control the look and feel of the Identity Manager user interface.

A theme is a set of visual characteristics that apply to the entire user interface (including the guest and login pages, the *Identity Self-Service* tab, the *Requests & Approvals* tab, and the *Administration* tab). There's always just one theme in effect for the user interface. The Themes page offers a choice of several themes, in case you want to switch to a different one.

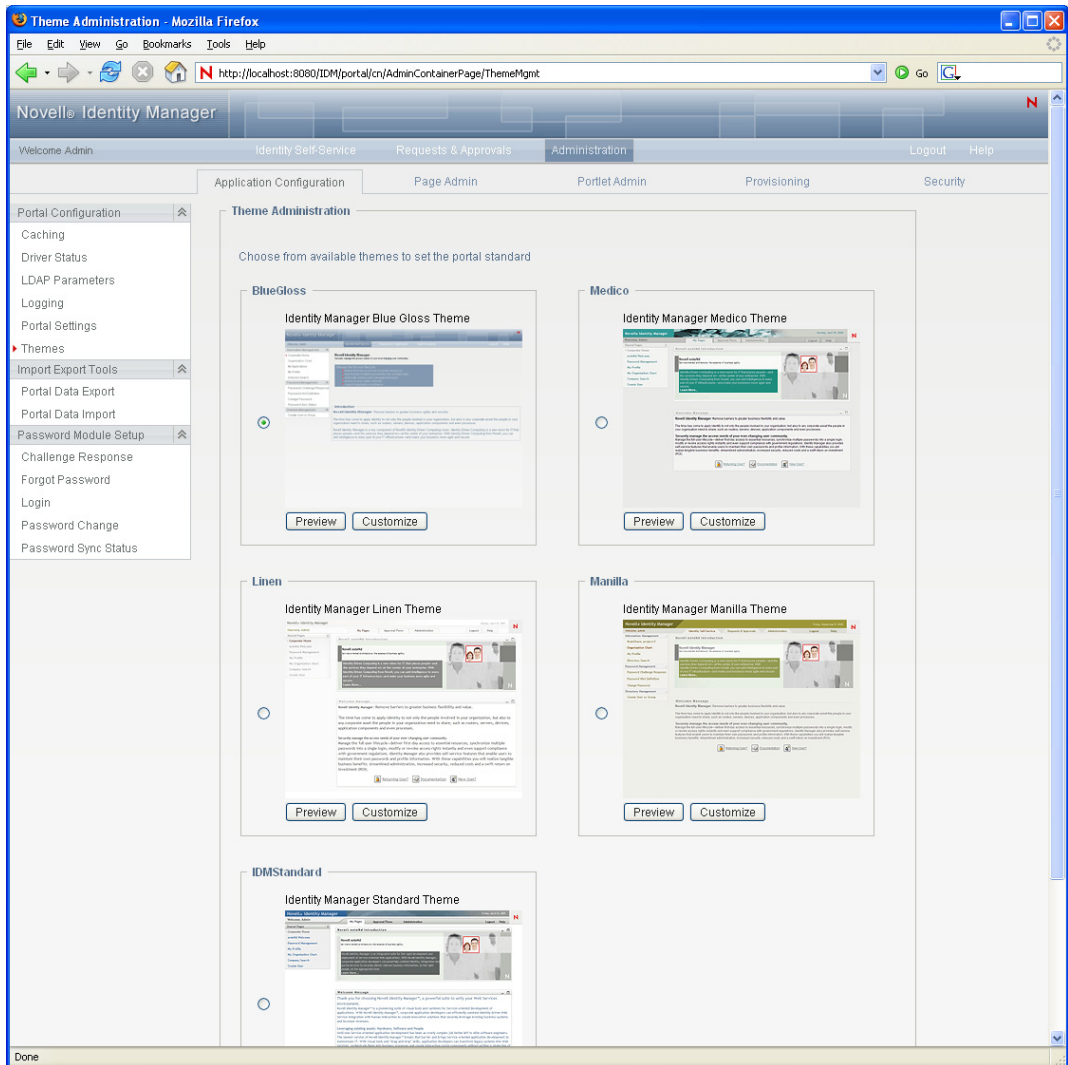
The Themes page also enables you to:

- ◆ Preview each theme choice to see how it looks
- ◆ Customize any theme choice to reflect your own branding (such as a logo)

## Previewing a Theme

Before choosing a theme, you can preview how it will change the look of the Identity Manager user interface.

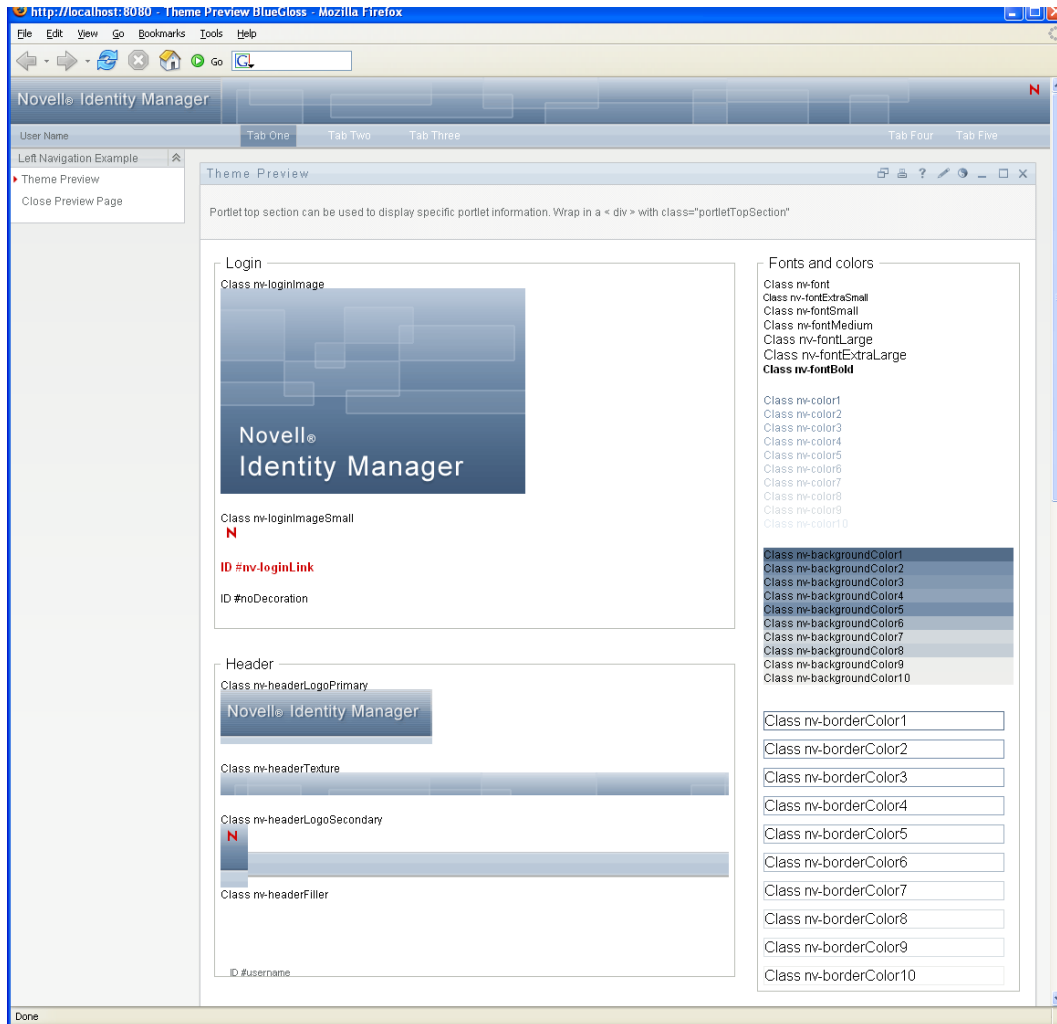
- 1 Go to the Themes page:



- 2 Find a theme that you are interested in, then click the corresponding *Preview* button.



The preview for that theme displays in a new browser window:



- 3 Scroll through the preview to see the characteristics of this theme.
- 4 When you're done, click *Close Preview Page* (in the top left corner) or close the preview window manually.

## Choosing a Theme

When you find a theme that you like, you can choose to make it the current theme for the Identity Manager user interface.

- 1 Go to the Themes page.
- 2 Click the radio button for the theme you want.
- 3 Click the *Save* button.

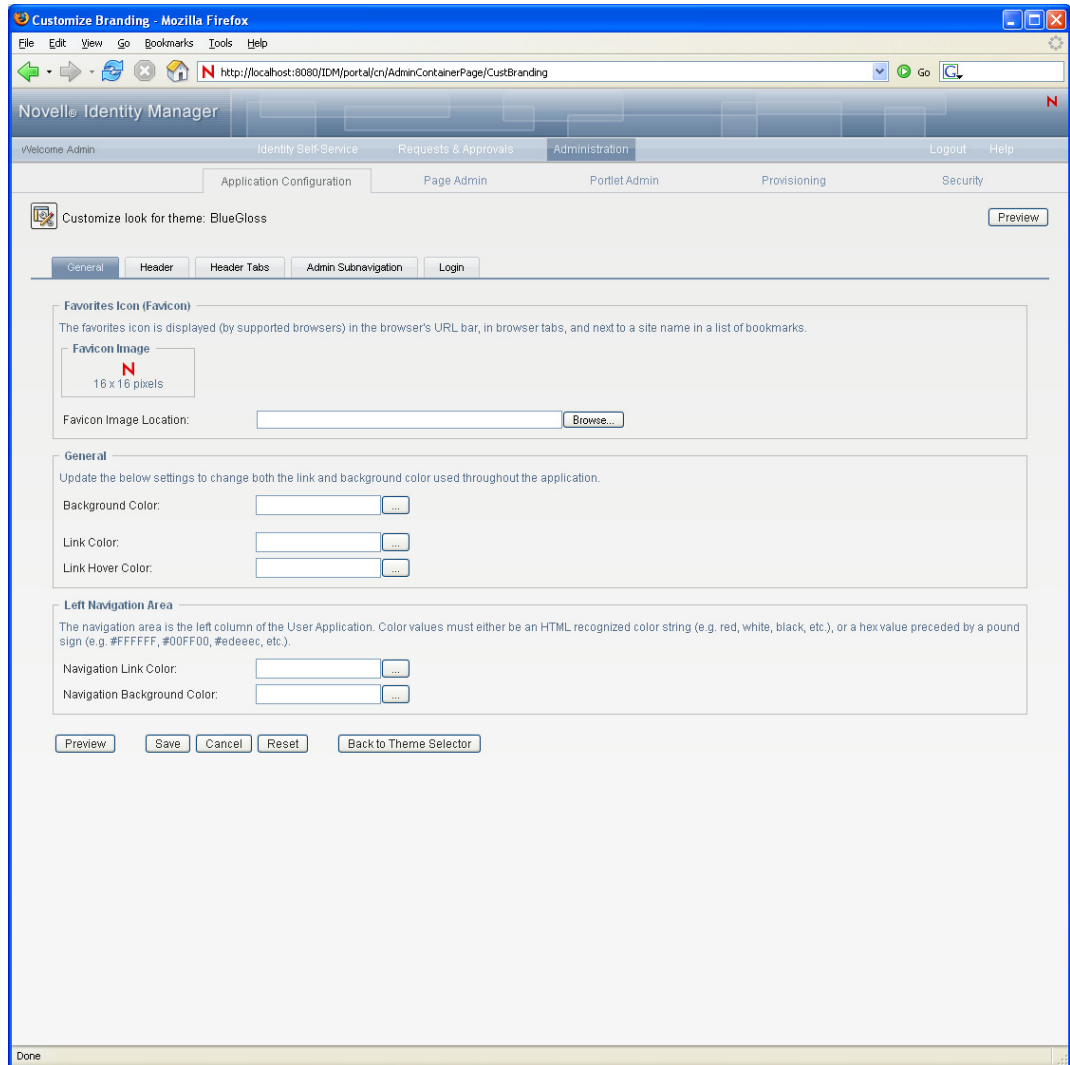
The look of the user interface changes to reflect your chosen theme.

## Customizing a Theme's Branding

You can tailor any theme by substituting your own images and changing some color settings. This enables you to give the Identity Manager user interface a custom look to meet the branding requirements of your company or organization.

- 1 Go to the Themes page.
- 2 Find a theme that you want to customize, then click the corresponding *Customize* button.

The Themes page displays the Customize Branding settings for that theme:



- 3 Specify your customizations by changing the settings in one or more tabs (as needed). Each tab contains the settings for different parts of the User Application interface. They include:
  - ♦ *General*: Lets you specify general theming properties such as a favorites icon, background, link and hover color, and the left navigation area properties.
  - ♦ *Header*: Lets you specify the header color, texture, logo and username properties.
  - ♦ *Header tabs*: Lets you specify the properties for the header tabs.
  - ♦ *Admin subnavigation*: Lets you specify the properties for the *Admin* tab.

- ◆ *Login*: Lets you specify the properties for the login screen.

Follow the on-screen instructions for specifying each setting. The changes are not reflected in the User Application until you save them. If you have made unsaved changes, the *Save* button displays an asterisk \* to indicate that the changes are pending a save.

**4** Click *Save*.

If you're editing the current theme, the look of the user interface changes to reflect your customizations. If you want to undo all of your customizations to the theme, click the *Reset* button.

**5** When you're done working on this theme, click *Back to Theme Selector*.

## Defining a Custom Theme

You can also create and deploy your own custom themes and deploy them in their own WAR file. When they are deployed, the custom themes are available through the Themes management page of the *Administration* tab. Before attempting to create your own custom theme, make sure you have a working knowledge of the following technologies:

- ◆ The structure of J2EE WAR files, how to modify the contents of a WAR file, and how to deploy one to your application server.
- ◆ How to modify CSS and XML files
- ◆ How to create the graphic elements for your theme

## Creating a Custom Theme

To create a custom theme, begin with a copy of an existing theme (such as *BlueGloss*) from the User Application WAR:

**1** Back up the deployed User Application WAR file (`IDM.WAR` or `IDMPROV.WAR`) to the directory in which you install, for example the `/opt/novell/idm` subdirectory.

**2** In a test environment, extract the contents of the User Application WAR file.

The files that comprise the User Application's themes are located in the `resource\themes` subdirectory. Each theme resides in its own directory with an appropriate name.

**3** In the test environment, create a directory for the custom theme.

The directory name can be any valid directory name, but it should reflect the name of the theme, and it should not contain spaces.

**4** Copy the contents of the BlueGloss theme from the extracted WAR file to the new subdirectory. You will be working with the following files:

File Name	Description
<code>theme.xml</code>	The theme descriptor file. It includes entries for display name and description. They are used in the <i>Themes</i> page of the <i>Administration</i> tab. The remaining entries correspond to the brandable selectors. The width and height attributes on these entries are used in the branding page to reference the exact dimensions needed when a user uploads a customized version of these images. These entries must match their respective images, width and height as found in the <code>themes.css</code> .

File Name	Description
<code>theme.css</code>	Contains the CSS selectors used to style the look and feel of the user interface.
<code>print.css</code>	Contains the CSS selectors used to style a print friendly version of the user interface.
An images subdirectory	Contains the images used by the theme.

Rules for working with these files:

- ◆ Do not change the names of the `theme.xml`, `theme.css`, and `print.css` files.
  - ◆ The CSS Selector names must remain the same, but you can change the properties of the selectors to establish the look and feel.
  - ◆ The images subdirectory can have any name, but you must reference it correctly in the CSS and XML files.
- 5** Make your changes to the images, CSS style sheets and other theme elements as needed. The following changes are recommended:
- ◆ In the `theme.xml` file:
    - ◆ **display-name:** Change this to a value that represents your theme. It displays as the Theme-name in the Themes page of the User Application's *Administration* tab.
    - ◆ **description:** Change this to a value that describes your theme. It displays as the Description in the Themes page of the User Application's *Administration* tab.
    - ◆ Consider whether to localize the *display-name* and *Description* fields.
  - ◆ In the graphics directory:
    - ◆ **thumbnails.gif:** Replace the copy with your own image. This image displays along with the Theme-name and Description of the theme (described above) that is shown in the Themes page of the *Administration* tab. It typically illustrates what the User Application landing page looks like when the associated theme is applied
    - ◆ **Renaming graphics files:** If you change the names of graphics files (rather than just substituting a different image of the same name), make sure to change the reference to the image in both the `theme.xml` and the `theme.css` file. If the image is not used in the branding interface (for example, if it is not listed as one of the subset of brandable images in the `theme.xml` file), then you will only need to change the reference to the image in the `theme.css` file. Suppose you want to rename `images/header_left.gif` to `images/my_company_name.gif`. Edit the `theme.css` file to reflect the new image name.
- 6** After you make all of the desired changes to the theme files, add your customized theme directory to a new WAR file that contains one or more custom themes. Deploy the new WAR to your test application server.
- Testing tip: Open the Themes page (available under the *Administration* tab). Your theme should display along with the prepackaged themes. Use the Theme Preview action to see how the customized changes to your new theme will render. This is a useful way to ensure that you have completed all of your intended changes to your theme.
- 7** After your changes are fully tested, you can deploy the WAR containing the custom theme to your production application server.

Any number of custom themes can reside in a single WAR. Any number of custom WARs containing custom themes can be deployed.

To undeploy the theme, remove the WAR that contains the theme from the application server's deploy directory. Before undeploying, make sure that any themes it contains are not defined as the User Application's default theme. If you remove the WAR and it does contain the default theme, the Theme Administration screen displays an error message and reverts the User Application theme to the original default theme defined at installation time.

## Customizing the Theme for External Password WAR

If you configured Password Management to use an *External Password WAR*, the theme for the Forgot Password page is defined in that external password WAR. The default name for the external password WAR is `IDMPwdMgt.WAR`. The `IDMPwdMgt.WAR` contains one theme; by default, it is *BlueGloss*. It does not include a user interface for modifying or branding this theme.

You can define a custom theme for the external Forgot Password page. The procedure for defining a custom theme is described in [“Defining a Custom Theme” on page 111](#); however, the deployment procedure for the external Forgot Password page is different and the rules about the custom theme WAR are more restrictive. After you define the custom theme:

- ◆ Package the theme in a WAR named `IDMPwdMgtTheme.WAR`.
- ◆ The `IDMPwdMgtTheme.WAR` can contain a single theme, and the theme must be located in the `resource/themes/Theme` directory within the WAR.
- ◆ Deploy the `IDMPwdMgtTheme.WAR` on the application server where the external WAR is located. Only one custom theme can be deployed at a time.

## 5.2 Working with the Import and Export Tools

You can use the Tools page to export or import portal content (pages and portlets) used in the Identity Manager User Application. This content is also known as the *portal configuration state* and it includes:

- ◆ Container and shared pages (including each page's assigned portlets, and each portlet's preferences and settings)
- ◆ Portlet registrations

**Table 5-5** *Portal Data Export and Import Tools*

Tool	How it works
Portal Data Export	Generates XML descriptions of a set of selected container and shared pages, and portlets. The XML files are stored in a portal data export ZIP file that can be used as input to the Portal Data Import tool.
Portal Data Import	Accepts a portal data export ZIP file as input. Uses the portal data export ZIP file to generate container and shared pages, and portlets in a portal (User Application).

The Export and Import tools enable you to move the portal configuration state from one portal (User Application) to another, as needed. [Table 5-5 on page 113](#) describes how these tools work.

You can use the Portal Data Export and Import tools to:

- ◆ Move your portal configuration state from a test (source) environment to a production (target) environment
- ◆ Update the configuration state of a portal incrementally
- ◆ Clone a portal
- ◆ Optionally, overwrite the configuration state on the target portal

## 5.2.1 Requirements

To use the Portal Data Export and Import tools, make sure that the Identity Manager User Application (portal) is deployed and running on your source and target application servers.

It is not required that your source and target servers access the same Identity Vault; they can access different ones, if appropriate. The users, groups, and containers in those Identity Vaults are not required to be the same.

## 5.2.2 Restrictions

You cannot use the Portal Data Export and Import tools to:

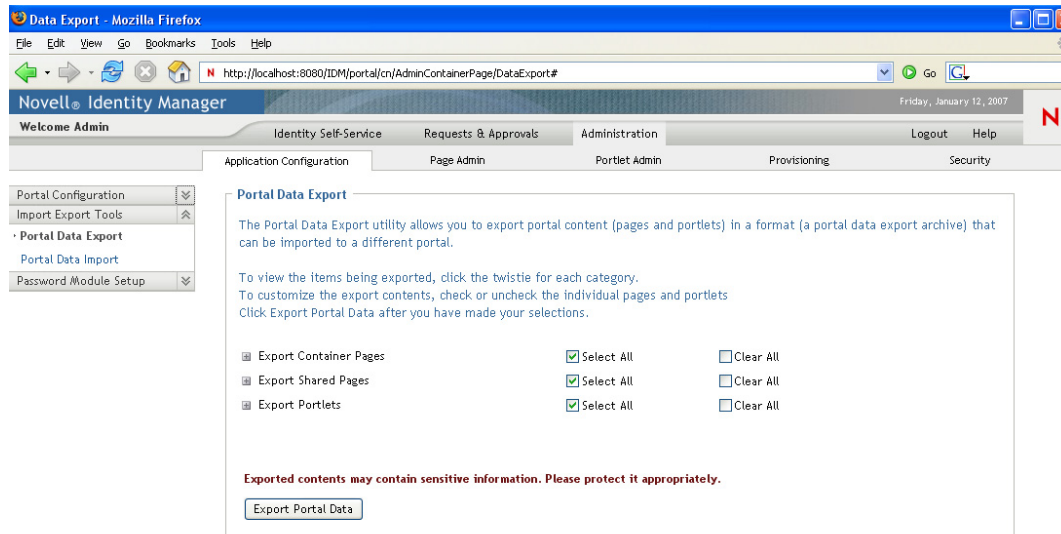
- ◆ Export or import portal configuration state when a server is currently servicing user requests
- ◆ Export or import portal classes and resources
- ◆ Export or import portlet classes and resources
- ◆ Export or import the identity and provisioning data used in a portal
- ◆ Export or import administration settings other than for pages and portlets
- ◆ Migrate configuration state from an earlier portal version to a later version (the portals must be the same version)

## 5.2.3 Exporting Portal Data

This section describes how to export a portal's configuration state to a portal data export ZIP file.

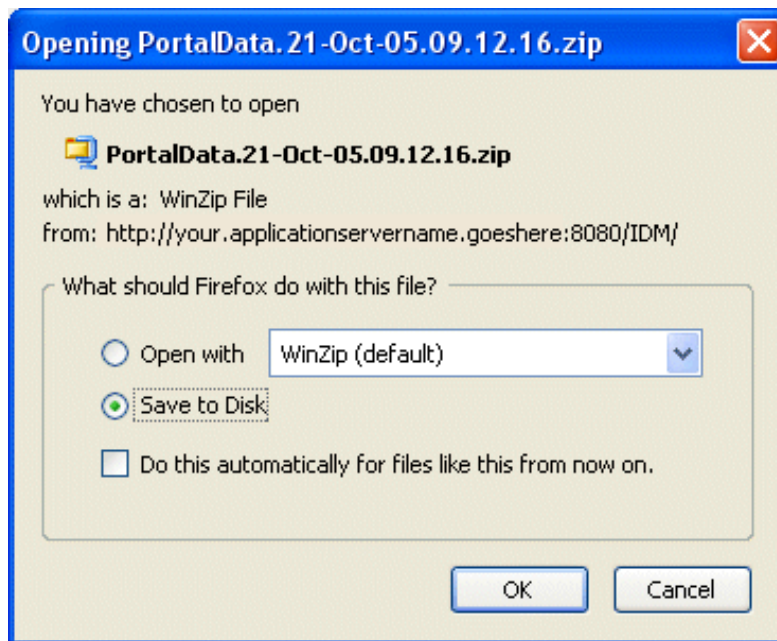
- 1 If you are performing an incremental update, back up the target portal.
- 2 On the Application Configuration page, select *Portal Data Export* from the navigation menu on the left.

The Portal Data Export panel displays:



- 3 Follow the on-screen instructions to select the portal pages and portlets that you want to export. Some portlets that you have not selected for export might still be exported. If you export a page that contains a portlet, but do not select that portlet for export, the portlet is still exported (to ensure that a runtime error does not occur for the exported page).
- 4 When you are done making selections, click *Export Portal Data*. Your new portal data export ZIP file is generated, with a default name that includes the current date and time. For example:  
`PortalData.21-Oct-05.09.12.16.zip`

You are then prompted to save this ZIP file locally (or to open it in an appropriate archive utility). For example:



- 5 Save the portal data export ZIP file to an appropriate location.

## 5.2.4 Importing Portal Data

This section describes how to import a portal data export ZIP file to a portal.

---

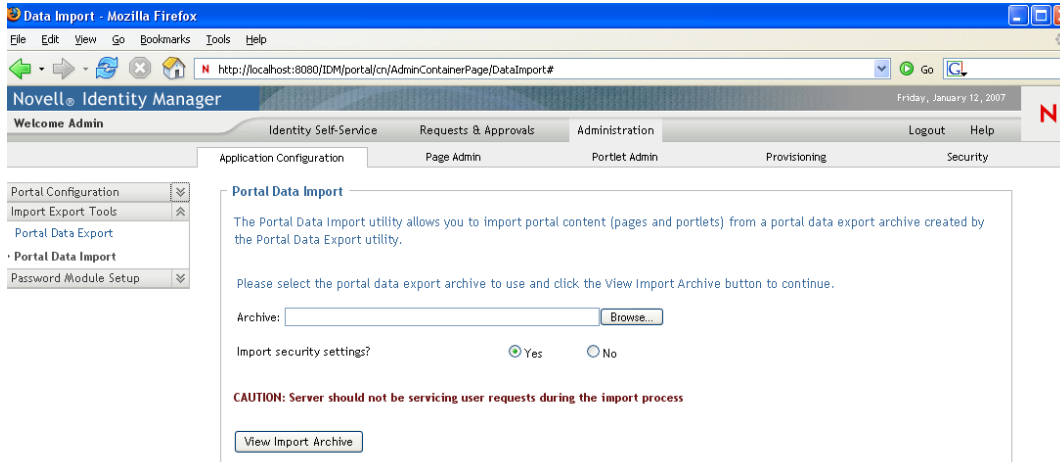
**NOTE:** Remember that, during the import, your target application server must be running but not currently servicing user requests.

---

- 1 If you are performing an incremental update, back up the target portal.
- 2 On the Tools page, select *Portal Data Import* from the navigation menu on the left.



The Portal Data Import panel displays:

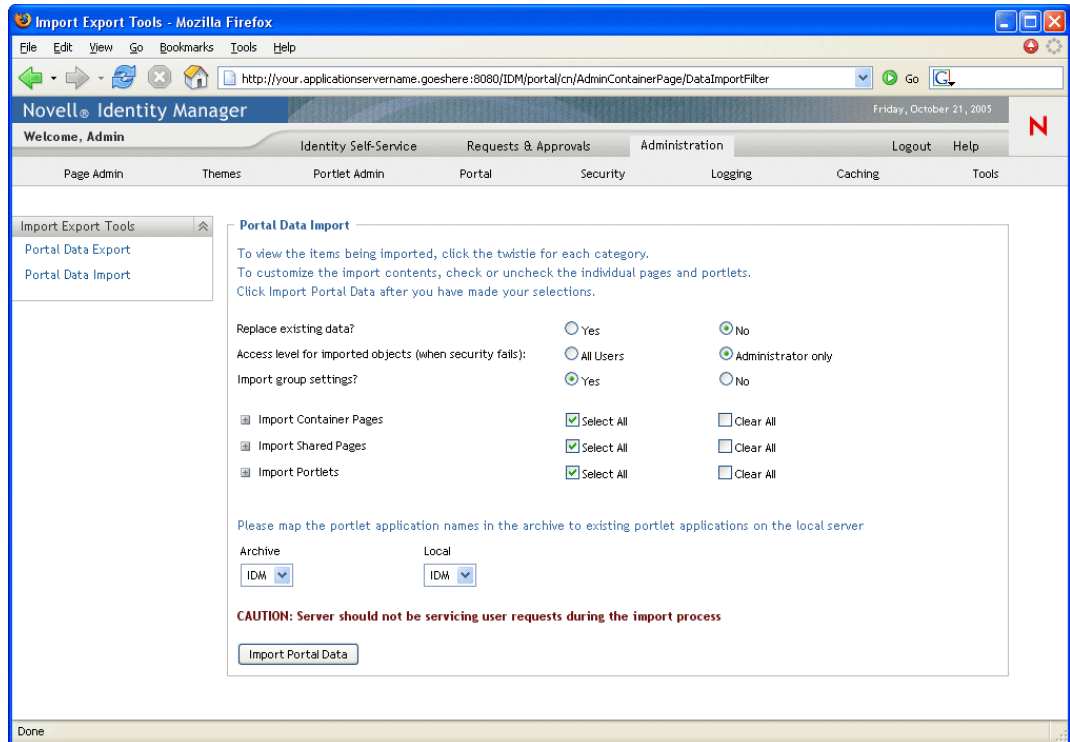


3 Specify the following general import settings:

Setting	What to Do
<i>Archive</i>	Click <i>Browse</i> to select the portal data export ZIP file to import. For example:  PortalData.21-Oct-05.09.12.16.zip
<i>Import security settings?</i>	Select one of the following: <ul style="list-style-type: none"> <li>◆ <i>Yes</i>: If you want to import the permissions that the portal data export ZIP file specifies for access to pages and portlets by users, groups, and containers. Make sure that the users, groups, and containers involved exist in the target portal's Identity Vault; permissions for missing entities fail to be imported.</li> <li>◆ <i>No</i>: If you want to ignore the permissions that the portal data export ZIP file specifies.</li> </ul>

4 Click *View Import Archive*.

The panel displays more specifics about your selected portal data export ZIP file and how you want to import it:



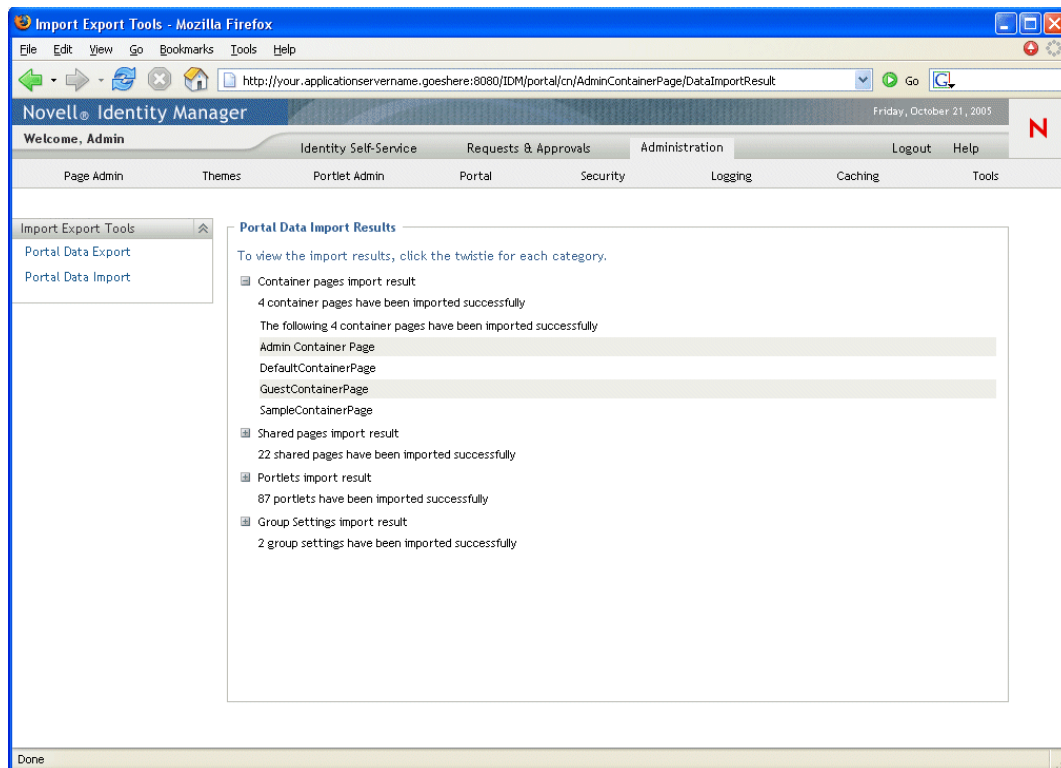
**5** Specify the following detailed import settings:

Setting	What to Do
<i>Replace existing data?</i>	<p>Select one of the following:</p> <ul style="list-style-type: none"> <li>◆ <b>Yes:</b> If you want the contents of the portal data export ZIP file to overwrite corresponding pages and portlets that already exist in the target portal. For example, if the portal data export ZIP file contains a shared page named MyPage and the target portal contains a shared page named MyPage, that existing page is overwritten in the target portal.</li> <li>◆ <b>No:</b> If you want to skip the import for all existing pages and portlets.</li> </ul>

Setting	What to Do
<i>Access level for imported objects</i>	<p>Select one of the following:</p> <ul style="list-style-type: none"> <li>◆ <i>All Users</i>: For unrestricted access to imported pages and portlets.</li> <li>◆ <i>Administrator only</i>: For restricted access to imported pages and portlets.</li> </ul> <p>If you chose to import security settings, then this access level is applied only to those imported pages and portlets where a security setting failed to be imported, typically because specified users, groups, or containers do not exist in the target portal's Identity Vault.</p> <p>If you chose not to import security settings, then this access level is applied to all pages and portlets that are imported.</p>
<i>Import group settings?</i>	<p>(If you chose to import security settings) Select one of the following:</p> <ul style="list-style-type: none"> <li>◆ <i>Yes</i>: If you want to import the default container page and default shared page assignments that the portal data export ZIP file specifies for groups. Make sure that the groups involved exist in the target portal's Identity Vault; assignments for missing groups fail to be imported.</li> <li>◆ <i>No</i>: If you want to ignore the default page assignments that the portal data export ZIP file specifies for groups.</li> </ul>
<i>Import Container Pages</i>	<p>Follow the on-screen instructions to select the pages and portlets that you want to import from the portal data export ZIP file to the target portal.</p>
<i>Import Shared Pages</i>	
<i>Import Portlets</i>	
<i>Please map the portlet application names... Archive/Local</i>	<hr/> <p><b>NOTE:</b> Some portlets that you have not selected for import might still be imported. If you import a page that contains a portlet, but do not select that portlet for import, the portlet is still imported to ensure that a runtime error does not occur for the imported page.</p> <hr/> <p>Use the <i>Archive</i> and <i>Local</i> drop-down menus to map the portlet application names in the archive (portal data export ZIP file) to existing portlet applications on the local (target) application server.</p>

**6** When you're ready to begin the import, click *Import Portal Data*.

When the import completes, the Portal Data Import Results panel displays:



Unsuccessful imports display in red. To troubleshoot import or export problems, look at your application server's system console or log file (such as `jboss/server/IDM/log/server.log`) for messages from the following User Application log:  
`com.novell.afw.portal.util`

- 7 Test the target portal to ensure that you imported the data that you expected.

## 5.3 Password Management Configuration

This section describes how to configure password self-service and user authentication features to your Identity Manager User Application. Topics include:

- ◆ [Section 5.3.1, "About Password Management Features," on page 121](#)
- ◆ [Section 5.3.2, "Configuring Challenge Response," on page 125](#)
- ◆ [Section 5.3.3, "Configuring Forgotten Password," on page 126](#)
- ◆ [Section 5.3.4, "Configuring Login," on page 129](#)
- ◆ [Section 5.3.7, "Configuring Change Password," on page 136](#)
- ◆ [Section 5.3.5, "Configuring Password Sync Status," on page 132](#)
- ◆ [Section 5.3.6, "Configuring Password Hint Change," on page 135](#)
- ◆ [Section 5.3.7, "Configuring Change Password," on page 136](#)

## 5.3.1 About Password Management Features

The password management features supported by an Identity Manager User Application encompass user authentication and password self-service. When you put these features into use, they enable your application to:

- ◆ Prompt for *login* information (username and password) to authenticate against Novell eDirectory™
- ◆ Provide users with password change self-service
- ◆ Provide users with forgotten password self-service (including prompting for challenge responses, displaying a password hint, or allowing a password change, as needed). You can configure forgotten password self-service to run inside the firewall (the default), or you can configure it to run outside the firewall.
- ◆ Provide users with challenge question self-service
- ◆ Provide users with password hint self-service

### Required Setup in eDirectory

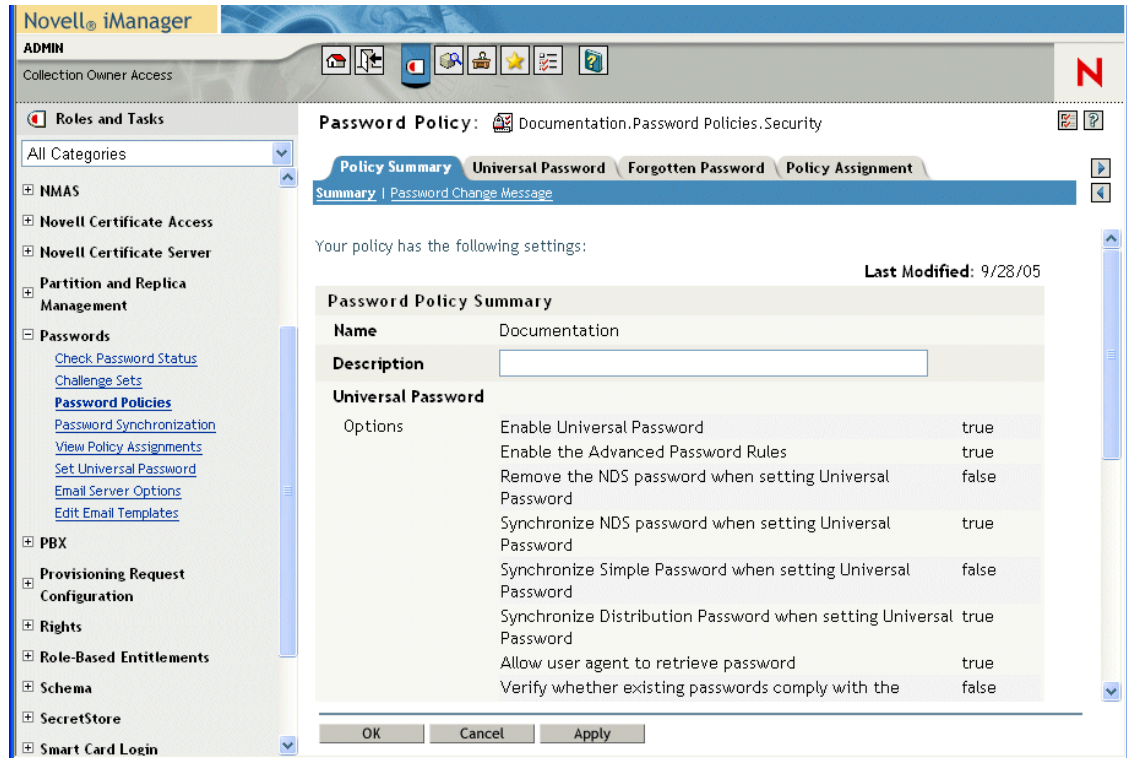
Before you can use most of the password self-service and user authentication features, you need to do the following in eDirectory:

- ◆ Enable *Universal Password*
- ◆ Create one or more password policies
- ◆ Assign the appropriate password policies to users

A password policy is a collection of administrator-defined rules that specify the criteria for creating and replacing user passwords. Novell Identity Manager takes advantage of NMASTM (Novell Modular Authentication Service) to enforce password policies that you assign to users in eDirectory.

You can use Novell iManager to perform the required setup steps. For example, here's how someone defined the DocumentationPassword Policy in iManager.

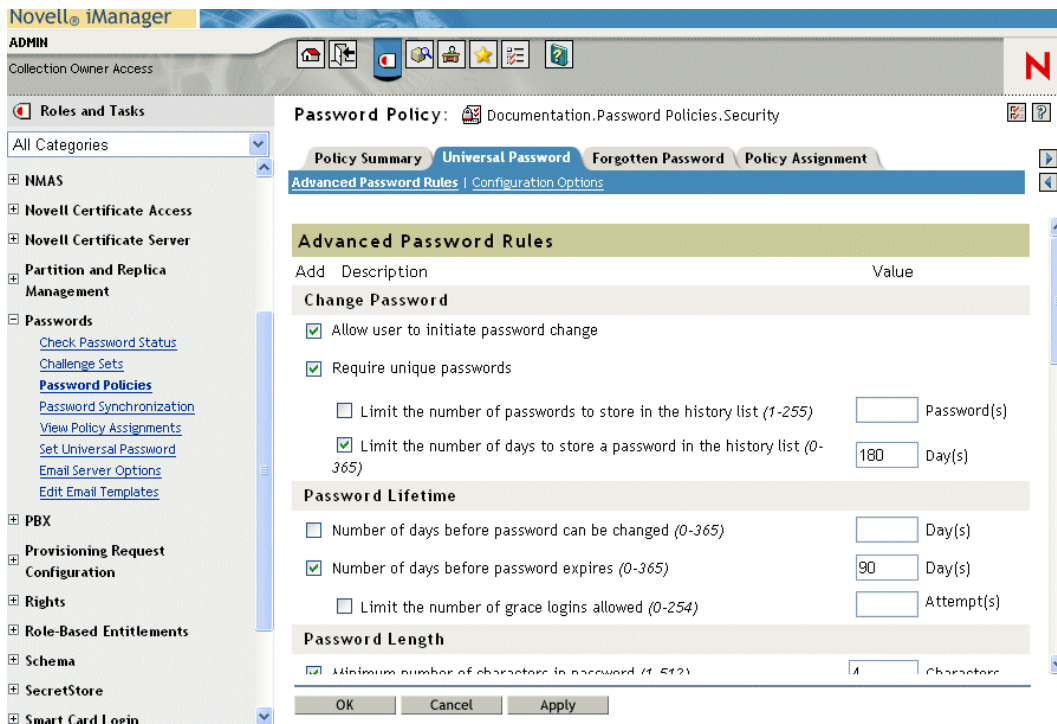
Figure 5-2 Sample Password Policy



This password policy specifies:

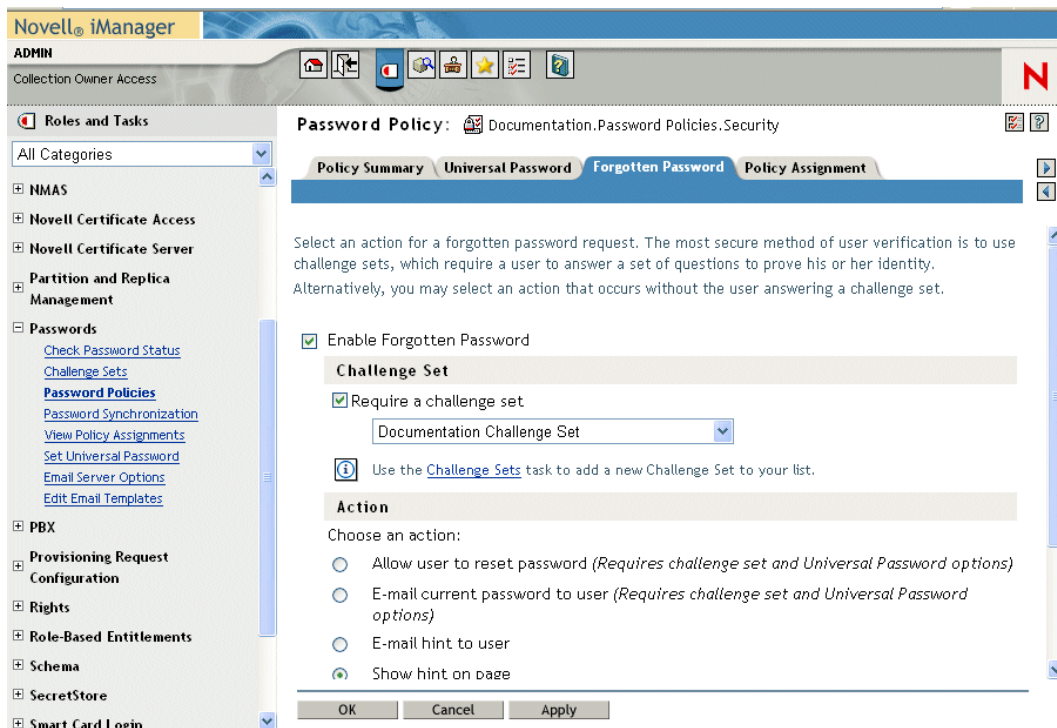
- ◆ Universal Password settings

Figure 5-3 Sample Universal Password Settings



- ◆ Settings to deal with forgotten-password situations

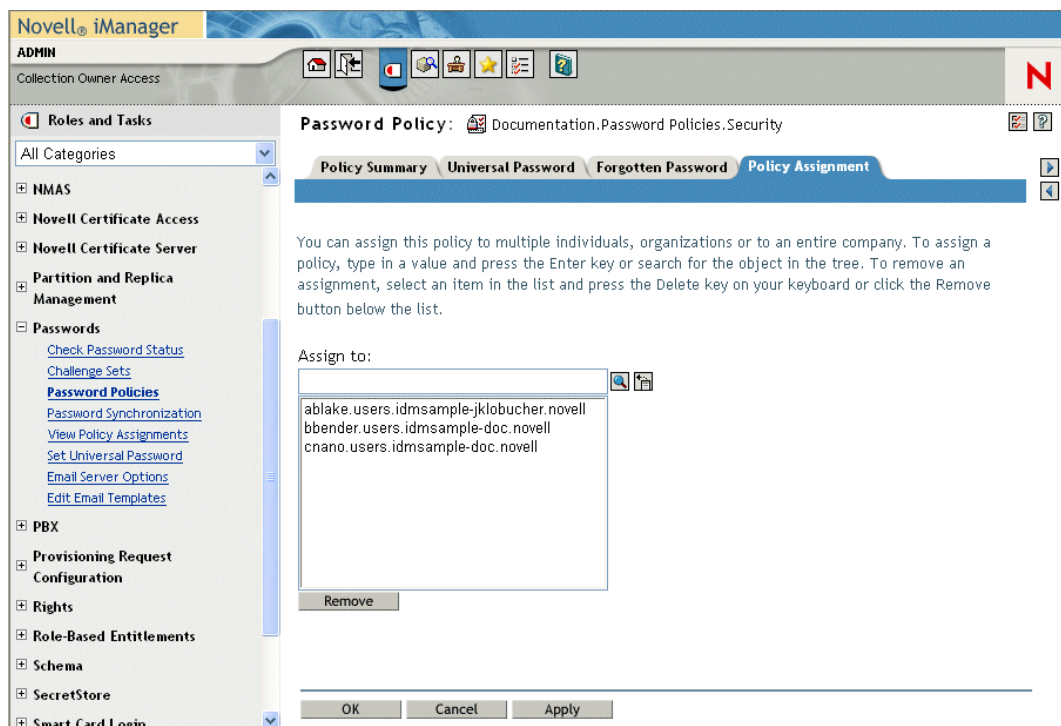
Figure 5-4 Sample Password Policy



- ◆ Assignments that apply the policy to specific users



Figure 5-5 Sample Policy Assignments



For more information on setting up Universal Password and password policies in eDirectory, see the [Novell Identity Manager Administration Guide \(http://www.novell.com/documentation/dirxml20/index.html\)](http://www.novell.com/documentation/dirxml20/index.html).

### Case-Sensitive Passwords

By default passwords are not case-sensitive. You can create a password policy that allows case-sensitive passwords. You can specify the *Allow the password to be case-sensitive* in the *Password Policies > Universal Password > Advanced Password Rules*. If you enable case-sensitive password, you must also enable the *Allow user to retrieve password* setting. It is enabled by default, but you can verify it through the *iManager Password Policies > Universal Password > Configuration Options* tab.

### Password Policy Compliance

If you enable Universal Password, it is recommended that you also configure the system to verify that existing passwords comply with the password policy. You can configure this through iManager. In iManager, go to *Passwords > Password Policies > Universal Password > Configuration Options*. Make sure the following option is selected: *Verify whether existing passwords comply with password policy (verification occurs on login)*. This ensures that users created through the User Application are forwarded to the Change Password page to enter a password that complies with the Identity Manager password policy.



## 5.3.2 Configuring Challenge Response

The Challenge Response self-service page lets users:

- ◆ Set up the valid responses to administrator-defined challenge questions, and set up user-defined challenge questions and responses
- ◆ Change the valid responses to administrator-defined challenge questions, and change user-defined challenge questions and responses

---

**TIP:** If you have localized the Challenge Response questions in iManager set the *Login Configuration* setting **Enable Locale Check** to True.

---

**Figure 5-6** Challenge Response Example

The screenshot shows the Novell Identity Manager interface. The top navigation bar includes 'Welcome Abby', 'Identity Self-Service', 'Requests & Approvals', 'Logout', and 'Help'. The date 'Wednesday, December 13, 2006' is displayed in the top right. The left sidebar contains a menu with categories like 'Information Management', 'Password Management', and 'Password Challenge Response'. The main content area is titled 'IDM Challenge Response' and contains the following text: 'These questions are assigned to your password policy. For all Admin-Defined Questions, provide a response. For all User-Defined Questions, create your own question and provide a response.' Below this, there are two sections: 'Admin Defined Challenge Questions' with two pre-defined questions and their respective response input fields, and 'User Defined Challenge Questions' with a single question and response input field. A 'Submit' button is located at the bottom of the form.

### Requirements

The Challenge Response requirements are described [Table 5-6 on page 125](#).

**Table 5-6** Challenge Response Requirements

---

Topic	Requirements
Password policy	A password policy with forgotten password enabled and a challenge set.
Universal Password	Does not require Universal Password to be enabled.
eDirectory configuration	Requires that you grant supervisor rights to the LDAP Administrator for the container in which the logged-in user resides. Granting these privileges allows the user to write a challenge response to the secret store.  For example, suppose the LDAP realm administrator is cn=admin, ou=sample, n=novell and you log in as cn=user1, ou=testou, o=novell. You need to assign cn=admin, ou=sample, n=novell as a trustee of testou, and grant supervisor rights on <i>[All attribute rights]</i> .

---

## Using the Challenge Response Feature

To use the Challenge Response feature, you need to know about the following:

- ◆ [“How Challenge Response Is Used During Login” on page 126](#)
- ◆ [“How Challenge Response Is Used in the User Application” on page 126](#)

### How Challenge Response Is Used During Login

During the login process, the Login page automatically redirects to Challenge Response whenever the user needs to set up challenge questions and responses (for example, the first time a user attempts to log in to the application after an administrator assigns the user to a password policy in iManager. The password policy must have forgotten password enabled and include a challenge set).

### How Challenge Response Is Used in the User Application

By default, the User Application provides users with self-service for changing challenge questions and responses.

## Configuring Challenge Response

The Challenge Response Configuration settings (on the *Administration* tab) are described in the following table.

**Table 5-7** Challenge Response Configuration Settings

Setting	Description
<i>Mask Response Text</i>	Choosing Yes means that user-entered response text is masked with asterisk (*) characters.

### 5.3.3 Configuring Forgotten Password

This feature uses challenge/response authentication to let users get information about their passwords. The result, which depends on the assigned password policy, can include:

- ◆ Displaying the user’s password hint on the screen
- ◆ E-mailing the hint to the user
- ◆ E-mailing the password to the user
- ◆ Prompting the user to reset (change) the password

Forgotten password self-service is typically available to users inside your corporate firewall through the deployed User Application WAR, but you can also configure your system so that the forgotten password management features are stored in a separate password management WAR. You can then deploy the password management WAR on a separate system that can be located inside or outside your corporate firewall. To learn how to setup Forgot Password outside the core User Application WAR, see [Section 2.5, “Configuring Forgotten Password Self-Service,” on page 51](#).

## Requirements

The Forgot Password feature requirements are listed in [Table 5-8 on page 127](#).

**Table 5-8** *Forgotten Password Requirements*

Topic	Requirements
Password policy	<p>Requires a password policy with forgotten password enabled and with a challenge set.</p> <p>When using password policies, you also need to configure the following settings on the Password Policy page in iManager to ensure that the User Application prompts the user to change the password on first login.</p> <ul style="list-style-type: none"><li>◆ <i>Force user to configure Challenge Questions and/or Hint upon authentication</i> must be enabled. This setting is on the Forgotten Password panel, under Authentication.</li><li>◆ <i>Verify whether existing passwords comply with the password policy (verification occurs on login)</i> must be enabled. This setting is on the Universal Password Policy panel, under Configuration Options&gt;Authentication.</li><li>◆ <i>Limit the number of grace logins allowed (0-254)</i> must be enabled. You can accept the default value of 6. This setting is on Universal Password panel, under Advanced Password Rules&gt;Password Lifetime. This setting is required to support the Create User action. The Create User action expires the user's password and sets the grace login value to 1, so that the user is forced to change the password on first login.</li></ul>
Universal Password	<p>Does not require Universal Password to be enabled, unless you want to support resetting the password or e-mailing the password to the user.</p>

## Using the Forgot Password Feature

To use the Forgot Password feature, you need to know about the following:

- ◆ [“How the Forgot Password feature Is Used During Login” on page 127](#)
- ◆ [“Configuring Your Environment for E-mail Actions” on page 128](#)
- ◆ [“Forgot Password Configuration Settings” on page 128](#)

### How the Forgot Password feature Is Used During Login

During the login process, the Login page redirects to the Forgot Password page if the user clicks the *Forgot Password* link. When Forgot Password displays, it does the following:

1. Prompts for username.
2. Redirects to the Challenge/Response page to perform challenge/response authentication for that user.
3. Performs the *forgotten password* action specified in the authenticated user's assigned password policy. It does one of the following:
  - ◆ Redirects to the Change password page so the user can reset their password
  - ◆ E-mails the password or hint to the user
  - ◆ Displays the hint

## Configuring Your Environment for E-mail Actions

If you want to support the Forgot Password e-mail actions, you need to make sure your e-mail notification server is set up properly:

- 1 Use a Web browser to access iManager on your eDirectory server and log in as an administrator.
- 2 Go to *Roles and Tasks > Passwords* and select *Email Server Options*.
- 3 Specify the appropriate settings, then click *OK*.

Forgot Password uses two e-mail templates. In iManager, you find them in *Roles and Tasks > Passwords > Edit Email Templates*. They are named:

- ◆ *Password hint request*
- ◆ *Your password request*

You can change the content of these templates as needed for your application, but don't change the structure. The Forgot Password page determines, based on the user's preferred locale, whether to display a localized e-mail template.

## Forgot Password Configuration Settings

You set the Forgot Password page configuration settings in the *Administration* tab. They are described in [Table 5-9 on page 128](#).

**Table 5-9** *Forgot Password Configuration Settings*

Configuration Setting	Description
<i>Login Sequence</i>	The NMAS login sequence to use. In this version, only Challenge Response is supported.
<i>LDAP secure port</i>	The secure LDAP port to use. The default is 636.
<i>Allow Wild Cards in Login</i>	Select True if you want users to be able to type a wildcard character when entering the username. (The default is false.) If set to True, <a href="#">Display DN Information</a> must also be True.  When True, the user is able to type a few characters of a username followed by a wild card character and the Forgot Password page returns a list of DNs that match the user-entered string.
<i>Display DN Information</i>	Select True when you want the Forgot Password page to display DN values. This can be used in conjunction with <a href="#">Allow Wild Cards in Login</a> . If set to False, no DN context information is displayed.
<i>Generic Password Policy User DN</i>	Specify the DN of an existing Identity Vault user established to prevent unauthorized users from accessing your system by guessing valid usernames.  By default, if the user enters an invalid name, the User Application displays the message <i>User not Found</i> . Under some circumstances an unauthorized user might be able to guess a valid name and answer the challenge questions correctly. One way to prevent this is to specify this value. See <a href="#">"Setting Up a Generic Password Policy User DN" on page 129</a> for additional required configuration steps.

Configuration Setting	Description
<i>Encoding</i>	The character encoding to use. The default is utf-8.
<i>Display Hint in Password Reset</i>	Select <i>True</i> (the default) to display the user's password hint on the Password Reset screen.  Select <i>False</i> to avoid displaying the user's password hint on the Password Reset screen.

## Setting Up a Generic Password Policy User DN

To support the **Generic Password Policy User DN**, you need to set up a user in the users container for this purpose. This user should:

- ◆ Have a password that is difficult to guess.
- ◆ Have his or her e-mail address assigned to a User Application Administrator.

You must set up:

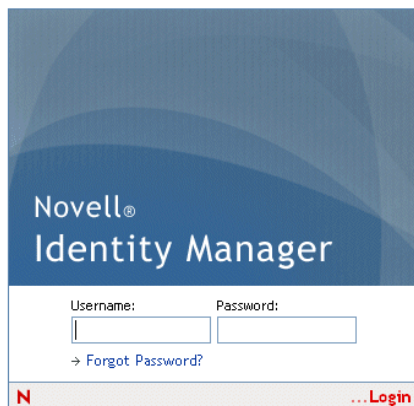
- ◆ A Challenge Set for this user and establish only Admin defined questions.
- ◆ A Password Policy that uses this Challenge Set. The Password Policy should have ForgotPassword enabled

You must log in to the User Application as this user at least once to supply the answers to the Admin-defined questions.

Finally, log in to the User Application as the User Application administrator and go to the *Forgot Password* configuration page of the *Administration* tab. Specify false for **Allow Wild Cards in Login** and **Display DN Information**. Specify this newly established user as the **Generic Password Policy User DN**.

### 5.3.4 Configuring Login

The Login page performs a very robust user authentication supported by Identity Manager (through Universal Password, password policies, and NMAS). The Login page redirects to the other password pages as needed during the login process.



## Requirements

The Login page requirements are listed in [Table 5-10](#) below.

**Table 5-10** *Login Requirements*

Topic	Requirements
Password policy	This page does not require a password policy, unless you want to use advanced password rules or let users click the <i>Forgot Password</i> link.
Universal Password	This page does not require Universal Password to be enabled, unless you want to use a password policy with advanced password rules.
SSL	This page uses SSL, so make sure that your application server is properly configured to support SSL connections to your LDAP realm.

Use the *Password Module Setup Login Action* to configure the following settings:

**Table 5-11** *Login Configuration Settings*

Configuration Setting	Description
<i>Allow ID Wildcard</i>	If True, users can specify the first few characters of a username and a list of usernames that include those characters is displayed so the user can select the user to login as.
<i>Enable Forgot Password Link</i>	If True, the User Application Login page displays the <i>Forgot Password</i> link.
<i>Forgot Password Link</i>	This value defines the name and path to the Forgot Password page. This initial value is established during installation. If you do not use an external password management WAR, you can leave the default value.  For more information, see <a href="#">Section 2.5, "Configuring Forgotten Password Self-Service,"</a> on page 51.
<i>Forgot Password Return Link</i>	Like the Forgot Password Link, this value is set during installation and you do not need to make any changes if you do not use an external password management WAR.  If you do use an external password WAR, use this setting to specify the URL that the Forgot Password page can use to return to the User Application when the user clicks <i>Submit</i> . The return link should take the form of: <code>protocol://servername:port/userappcontext</code> For example, <code>https://idmhost:8080/IDMProv</code>  For more information, see <a href="#">Section 2.5, "Configuring Forgotten Password Self-Service,"</a> on page 51.
<i>Enable SSO</i>	If True, the Username and password are stored in the session and can be accessed by other properly configured portlets. The username is stored in the <a href="#">SSO User ID Key</a> and the password in the <a href="#">SSO Password Key</a>

Configuration Setting	Description
<i>SSO User ID Key</i>	If <b>Enable SSO</b> is True the username is stored in the session using this key.
<i>SSO Password Key</i>	if <b>Enable SSO</b> is True the password is stored in the session using this key.
<i>Enable Hint Migration</i>	If True, any existing hints are moved from the <code>nsimHint</code> to the <code>nsimPasswordReminder</code> .
<i>Enable Locale Check</i>	If True, and the user has not set their locale preferences, the User Application displays a page that allows them to set their preferred locale.
<i>Enable Password Autocomplete</i>	If True and supported by the browser, the user's browser opens a window asking if the user wants to save the login credentials.  If False (the default), the user does not receive a browser prompt to save the login credentials.

## Using the Login Page

To use the Login page, you need to know about the following:

- ◆ [“How Login Redirects to Other Pages” on page 131](#)
- ◆ [“Using Grace Logins” on page 131](#)

### How Login Redirects to Other Pages

At runtime, the Login page redirects to other password pages, depending on what's needed to complete the login process. [Table 5-12 on page 131](#) directs you to descriptions.

**Table 5-12** *Login Directions to Other Pages*

If the user	Login redirects to
<i>Clicks the link <code>Forgot Password</code></i>	Forgot Password page
<i>Needs to set up challenge questions and responses</i>	Challenge response page
<i>Needs to set up a password hint</i>	Hint Definition page
<i>Needs to reset an invalid password</i>	Change password page

### Using Grace Logins

If you use a grace login, the Login page displays a warning message that asks you to change your password and indicates the number of grace logins that remain. If you are on your last login, the Login page redirects you to the Change Password page.

## 5.3.5 Configuring Password Sync Status

Password Sync Status lets users check the progress of the password change process on connected systems. You can specify a different image to represent each connected system. To set up password sync status checking:

- ◆ Define the connected applications whose status the user should be able to view during the synchronization process. You define the connected applications in the Password Sync Status Application Settings described in [Table 5-14 on page 134](#).
- ◆ Define the settings for the password sync status page displayed to users. These settings are described in [Table 5-13, “Password Sync Status Client Settings,” on page 133](#).

By default, the User Application Administrator can view the password sync status of other users when the User Application Administrator accesses the Password Sync Status page, shown in [Figure 5-7 on page 132](#). The administrator can access the sync status for another user by specifying the other user’s DN, then clicking *Check Sync Status*.

**Figure 5-7** Password Sync Status

The screenshot shows the 'Administration' tab in Identity Manager. The left sidebar lists various configuration options, with 'Password Sync Status' selected. The main content area is split into two sections:

- Password Sync Status Client Settings:** This section allows users to configure how the status is displayed. It includes input fields for:
  - Password Sync Buffer Time (milliseconds): 0
  - Image Per Row: 4
  - Individual Application Timeout (milliseconds): 3000
  - All Applications Timeout (milliseconds): 300000
  - Process Count: 3
  - Pass Phrase: (empty)
  - Application Image Size Limit (bytes): 1048576A 'Save' button is located at the bottom left of this section.
- Password Sync Status Application Settings:** This section is used to define new applications. It includes input fields for:
  - Password Synchronization Application Name:\*
  - Application Dir\*XML-PasswordSyncStatus GUID:\*
  - Application Image:\*
  - Application Filter:
  - Dependent Driver:There are also search and browse icons for the GUID and Image fields. A 'Save' button is at the bottom left and a 'Cancel' button is at the bottom right of this section.

In addition to the User Application Administrator, you can define a set of users to perform the Check Sync Status for other users (for troubleshooting or other purposes). The members of a group called PasswordManagement are also automatically allowed to view the password synchronization status of other users. This group does not exist by default. If you choose to create this group, it must be:

- ◆ Named PasswordManagement.
- ◆ Given privileges to the Identity Vault. The group must have rights to read the user’s eDirectory object attribute for users whose password synchronization status they need to view.



**Table 5-13** Password Sync Status Client Settings

Configuration Setting	Description
<i>Password Sync Buffer Time (milliseconds)</i>	<p>The password sync status checking compares time stamps across different Identity Vaults and connected systems. This buffer time is intended to account for differences between the system times on these different machines. This time is added to the time stamp on the user object's password change attribute to determine if a change has occurred. It is used like this:</p> <p>The Password Sync Status process uses the buffer time as follows:</p> <ul style="list-style-type: none"><li>◆ If the time stamp value (password sync time) in DirXML-PasswordSyncStatus for the connected system is older than the last password change time stamp (pwdChangedTime attribute of user object) + password sync buffer time, then the status is considered old and the system continues polling for an updated status for the connected system.</li><li>◆ If the time stamp value in DirXML-PasswordSyncStatus for the connected system is newer than the last password change time stamp + password sync buffer time, then the password sync functionality returns the status code or message and displays the updated status of the connected system.</li><li>◆ The last password change time stamp is populated to the user object after the user's password change. This functionality is available in NMAS 3.1.3 and higher.</li></ul>
<i>Image Per Row</i>	<p>The number of application images to display per row in the Identity Self-Service Password Sync Status page.</p>
<i>Individual Application Timeout (milliseconds)</i>	<p>The amount of time that the Password Sync Status process waits for a response for each connected application's status before checking for the next one.</p>
<i>All Application Timeout (milliseconds)</i>	<p>This value indicates the amount of time allowed for the entire password sync status process (of all connected systems) to complete. Before this timeout is reached, the password sync process continues to poll until all status values are updated or this timeout is reached. When the timeout status is reached, the system displays an error message to the user that indicates that a timeout condition has been reached.</p>
<i>Process Count</i>	<p>The number of times each connected system is checked for the password sync status.</p>
<i>Pass Phrase</i>	<p>If the DirXML-PasswordSyncStatus contains a password hash, then the value entered in this field is compared to that value. If they are not equal, the User Application displays an invalid hash message.</p>
<i>Application Image Size Limit (bytes)</i>	<p>Lets you set the maximum size (in bytes) of the application image that can be uploaded. You specify this image in the Application Image setting described in <a href="#">Table 5-14</a>.</p>

The password Sync Status Application Settings are described in [Table 5-14](#).

**Table 5-14** Password Sync Status Application Settings

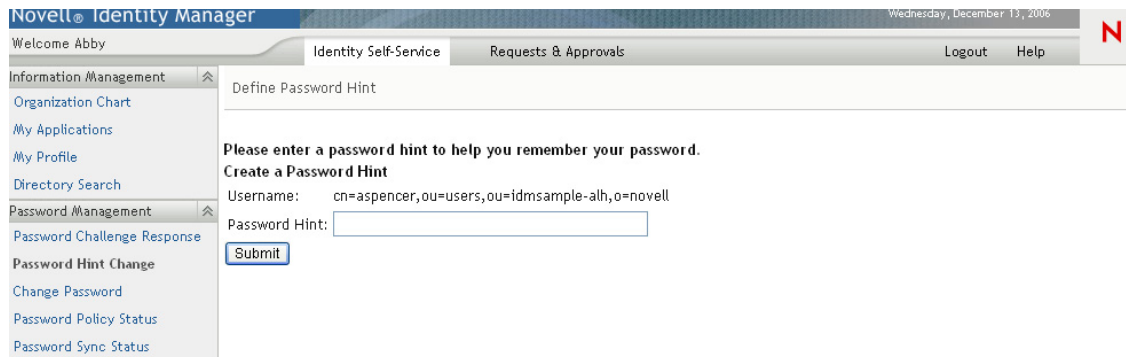
Configuration Setting	Description
<i>Password Synchronization Application Name</i>	<p>The name used to describe the connected application. You can enter the application name in multiple locales.</p> <p>To add a language (locale):</p> <ol style="list-style-type: none"><li>1. Click <i>Add Language (+)</i>.</li><li>2. Type the Application Name for the desired localized languages in the appropriate field.</li><li>3. Click <i>Save</i>.</li></ol> <p>If you do not specify localized application names, the value specified in the <i>Password Synchronization Application Name</i> is used.</p>
<i>Application DirXML-PasswordSyncStatus GUID</i>	<p>You can get the driver GUID by browsing the attributes on the driver object in one of two ways:</p> <ul style="list-style-type: none"><li>◆ Click the browse button next to this field. This browse button obtains only GUIDs of drivers in the current driverset that the user application driver resides in.</li><li>◆ Use iManager to browse for the driver (use the <i>General - Other</i> tab, used when modifying the object) and manually copy and paste the GUID into this field.</li></ul>
<i>Application Image</i>	<p>The name of the connected application Image to upload. The Application Image size can be configured from the Application Image Size Limit field in the Password Sync Status Client Settings section. Supported file types are .bmp, .jpeg, .jpg, .gif, and .png.</p>
<i>Application Filter</i>	<p>Optional. Specify an LDAP filter that allows or prohibits users' viewing the application name on their Check Password Synchronization pages.</p> <p>You can use any standard LDAP filter.</p>

Configuration Setting	Description
<i>Dependent Driver</i>	<p data-bbox="705 213 1151 268">Optional. Specify any additional driver this application depends on.</p> <p data-bbox="705 294 1238 405">If any driver in the dependent driver chain is not visible to the user, the driver specified by Application DirXML-PasswordSyncStatus GUID is also not visible to the user.</p> <p data-bbox="705 431 1247 544">If any driver in the dependent driver chain fails to check password sync status, the driver specified by Application DirXML-PasswordSyncStatus GUID also fails to check password sync status.</p> <p data-bbox="705 570 1225 624">You can get the driver GUID by browsing the attributes on the driver object in one of two ways:</p> <ul data-bbox="731 651 1195 705" style="list-style-type: none"> <li data-bbox="731 651 1195 705">◆ Use the object selector button beside the Dependent Driver field.</li> </ul> <p data-bbox="759 731 1244 1050">This method saves the application driver's fully distinguished name (FDN). When a user checks password sync status, this FDN is compared to the value of the FDN field in the DirXML-Associations attribute of the user object. If the two FDNs do not match, this application is not visible to the user. If there is a match, and if the DirXML-Associations attribute's driver status field is not 0 and the driver data field is not null, this application is visible to the user.</p> <ul data-bbox="731 1070 1222 1124" style="list-style-type: none"> <li data-bbox="731 1070 1222 1124">◆ Manually enter the GUID for the dependent driver.</li> </ul> <p data-bbox="759 1141 1244 1366">Use this method when this application driver is not from the current driverset that the user application driver resides in. This method does not save an FDN. When a user checks password sync status, FDNs are not compared, and this dependent driver is visible to the user unless you apply an Application Filter that excludes the user.</p>

### 5.3.6 Configuring Password Hint Change

This self-service page lets users set up or change their password hints, which can be displayed or e-mailed as a clue in forgotten password situations.

**Figure 5-8** Define Password Hint Sample



## Requirements

The Password Hint Change requirements are listed in [Table 5-15](#).

**Table 5-15** Password Hint Change Requirements

Topic	Requirements
Universal Password	Does not require Universal Password to be enabled.

## Using the Password Hint Change Page

To use the Password Hint Change page, you need to know about the following:

- ◆ [“How Password Hint Change Is Used During Login” on page 136](#)
- ◆ [“Using Password Hint Change in the User Application” on page 136](#)

### How Password Hint Change Is Used During Login

During the login process, the Login page automatically redirects to the Password Hint Change page whenever users need to set up their password hints. For example, the first time a user attempts to log in to the application after an administrator assigns the user to a password policy in iManager, the password policy has forgotten password enabled and has the action set to *Email hint to user* or *Show hint on page*.

### Using Password Hint Change in the User Application

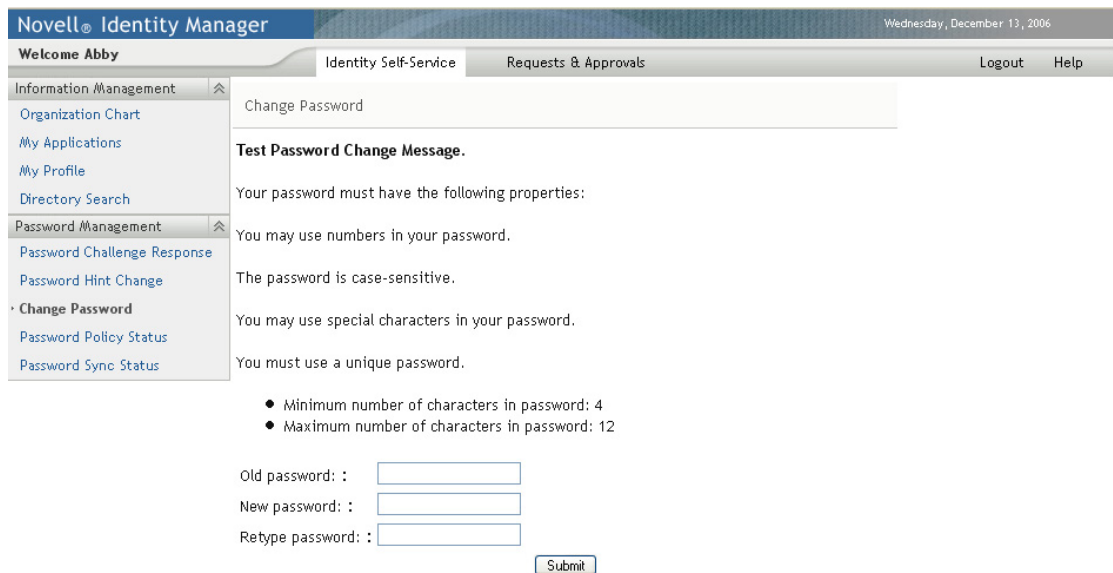
By default, the User Application provides users with self-service for changing a password hint.

## 5.3.7 Configuring Change Password

This self-service page lets users change (reset) their Universal Passwords, according to the assigned password policy. It uses that policy to display the rules that the new password must conform to.

If Universal Password is not enabled, this page changes the user’s eDirectory (simple) password, as permitted in the user’s Password Restrictions.

**Figure 5-9** *Change Password*



There are no Password Change configuration settings.

## Requirements

The Change Password page requirements are listed in [Table 5-16](#).

**Table 5-16** *Change Password Requirements*

Topic	Requirements
Directory Abstraction Layer configuration	No directory abstraction layer configuration is required for this page.
Password policy	This page does not require a password policy, unless you want to use advanced password rules (with Universal Password enabled).
Universal Password	To use this page for a Universal Password, the setting <i>Allow user to initiate password change</i> must be enabled in the Advanced Password Rules of the user's assigned password policy.  To use this page for an eDirectory (simple) password, the setting <i>Allow user to change password</i> must be enabled in the user's Password Restrictions.

## Using the Change Password Page

To use the Change Password page, you need to know about the following:

- ◆ [“How Change Password Is Used During Login”](#) on page 138
- ◆ [“Using Change Password in the User Application”](#) on page 138

## How Change Password Is Used During Login

During the login process, the Login page automatically redirects to the Change Password page whenever the user needs to reset an invalid password. For example, the first time a user attempts to log in to an application after an administrator implements a password policy that requires users to reset their passwords.

The Forgot Password page also redirects to Change Password automatically if the user's assigned password policy specifies reset password as the action for forgotten password situations.

## Using Change Password in the User Application

By default, the User Application provides users with the password change self-service using the Change Password page.

# Page Administration

This section describes how to use the Page Admin page on the *Administration* tab of the Identity Manager user interface. Topics include:

- ◆ [Section 6.1, “About Page Administration,” on page 139](#)
- ◆ [Section 6.2, “Creating and Maintaining Container Pages,” on page 147](#)
- ◆ [Section 6.3, “Creating and Maintaining Shared Pages,” on page 155](#)
- ◆ [Section 6.4, “Assigning Permissions for Pages,” on page 163](#)
- ◆ [Section 6.5, “Setting Default Pages for Groups,” on page 168](#)
- ◆ [Section 6.6, “Selecting a Default Shared Page for a Container Page,” on page 170](#)

For more general information about accessing and working with the *Administration* tab, see [Chapter 4, “Using the Administration Tab,” on page 83](#).

## 6.1 About Page Administration

You use the Page Admin page to control the pages displayed in the Identity Manager user interface and who has permission to access them. The user interface includes two types of pages.

**Table 6-1** *Page Types*

Type of Page	Description
Container	Container pages wrap shared pages with a consistent look and feel, corporate branding, and navigation approach.
Shared	Shared pages provide a coherent set of content that is used for a specific purpose (such as updating a user’s profile). They are called shared pages because they offer services used by multiple people.

Both page types include content in the form of *portlet*s (a Java standard for pluggable user-interface elements).

To learn more about portlets, see [Chapter 7, “Portlet Administration,” on page 173](#) and [Part IV, “Portlet Reference,” on page 207](#).

### 6.1.1 About Container Pages

This section introduces you to some container pages that play an important role in the Identity Manager user interface:

- ◆ [“GuestContainerPage” on page 140](#)
- ◆ [“DefaultContainerPage” on page 142](#)
- ◆ [“Admin Container Page” on page 144](#)

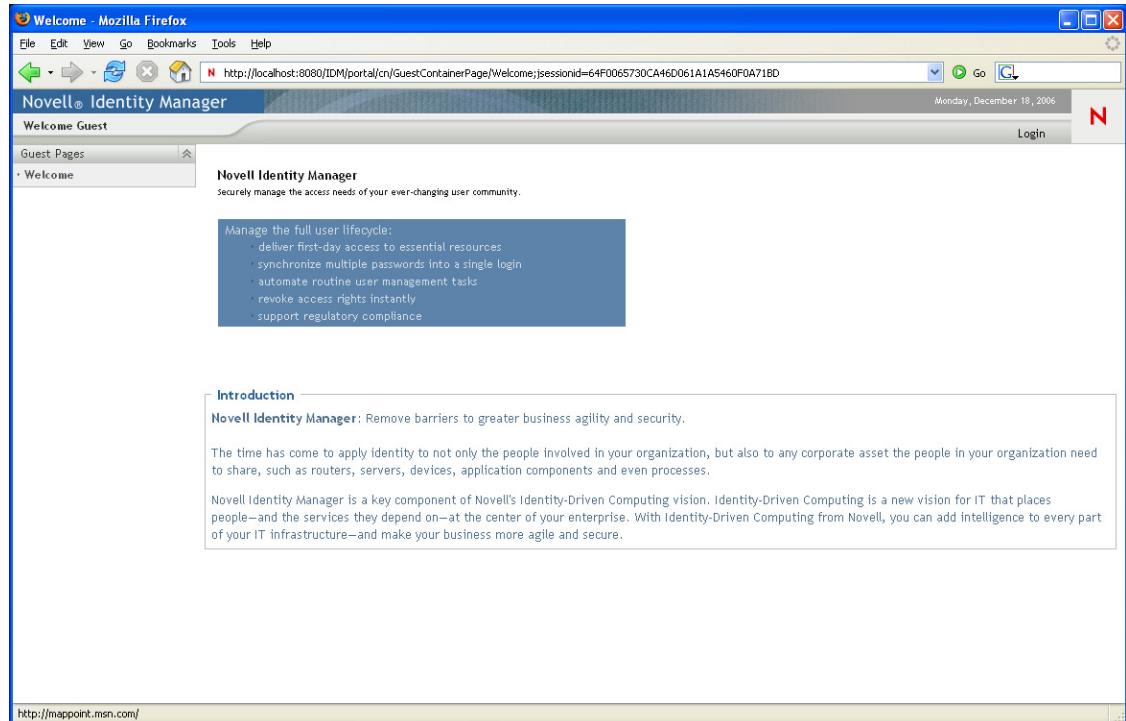
Keep in mind that you can modify these container pages if necessary. You also have the option of adding your own container pages.

To learn about working with container pages, see [Section 6.2, “Creating and Maintaining Container Pages,”](#) on page 147.

## GuestContainerPage

By default, when users arrive at the Identity Manager user interface prior to logging in, they see the container page named GuestContainerPage shown in [Figure 6-1](#).

**Figure 6-1** Default Guest Container Page



Internally, GuestContainerPage has the following layout:



**Figure 6-2** *GuestContainerPage Layout*



The GuestContainerPage layout is divided into three regions, which display the following portlets:

**Table 6-2** *Layout Regions*

Portlet	Description
HeaderPortlet	Displays the header information and top-level tab controls for the user interface
Shared Page Navigation	Displays a vertical menu from which the user can select a shared page to display
Portal Page Controller	Displays the shared page that the user has currently selected via the Shared Page Navigation portlet

By default, users see only the following in those portlets prior to logging in:

- ◆ A single link in the header: *Login*
- ◆ A single shared page: *Welcome*

Because the user has not logged in yet, the Shared Page Navigation portlet shows only shared pages that are in the Guest Pages category; it filters out all other categories. By default, Welcome is the only page in the Guest Pages category.

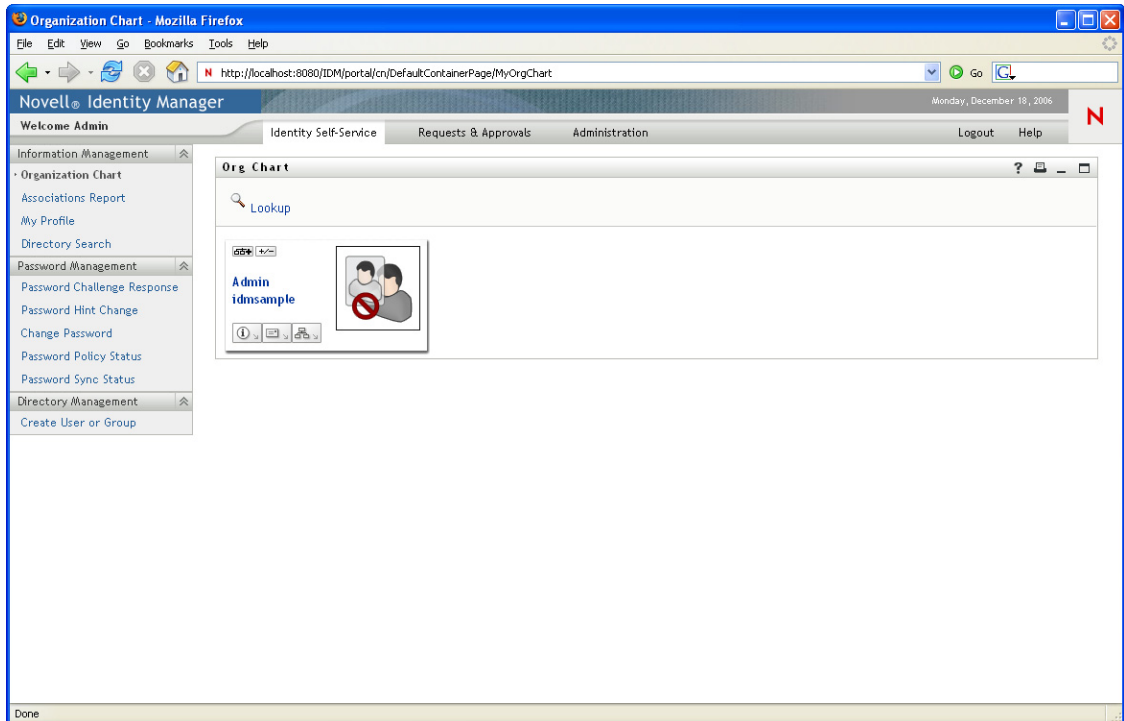
After login, the Shared Page Navigation portlet filters out the Guest Pages category. Instead, it shows other categories of shared pages (as specified in its preferences).

For more information on the Shared Page Navigation portlet, see [Chapter 10, “About Portlets,” on page 209](#).

## DefaultContainerPage

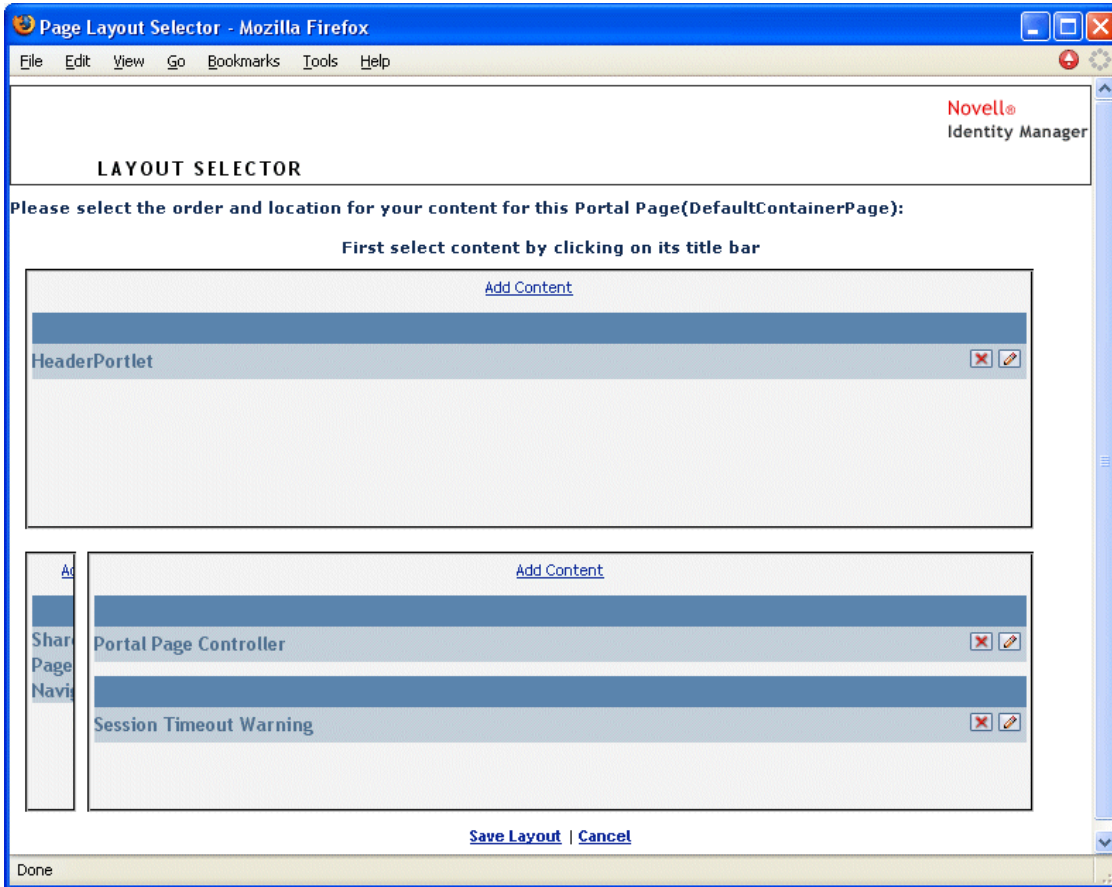
By default, after users log in to the Identity Manager user interface, they go to the container page named DefaultContainerPage shown in [Figure 6-3](#).

**Figure 6-3** *Default Container Page*



Internally, DefaultContainerPage has the layout shown in [Figure 6-4](#).

**Figure 6-4** Default Container Page Layout



The DefaultContainerPage layout is divided into three regions, which display the portlets described in [Table 6-3](#).

**Table 6-3** Default Container Page Portlets

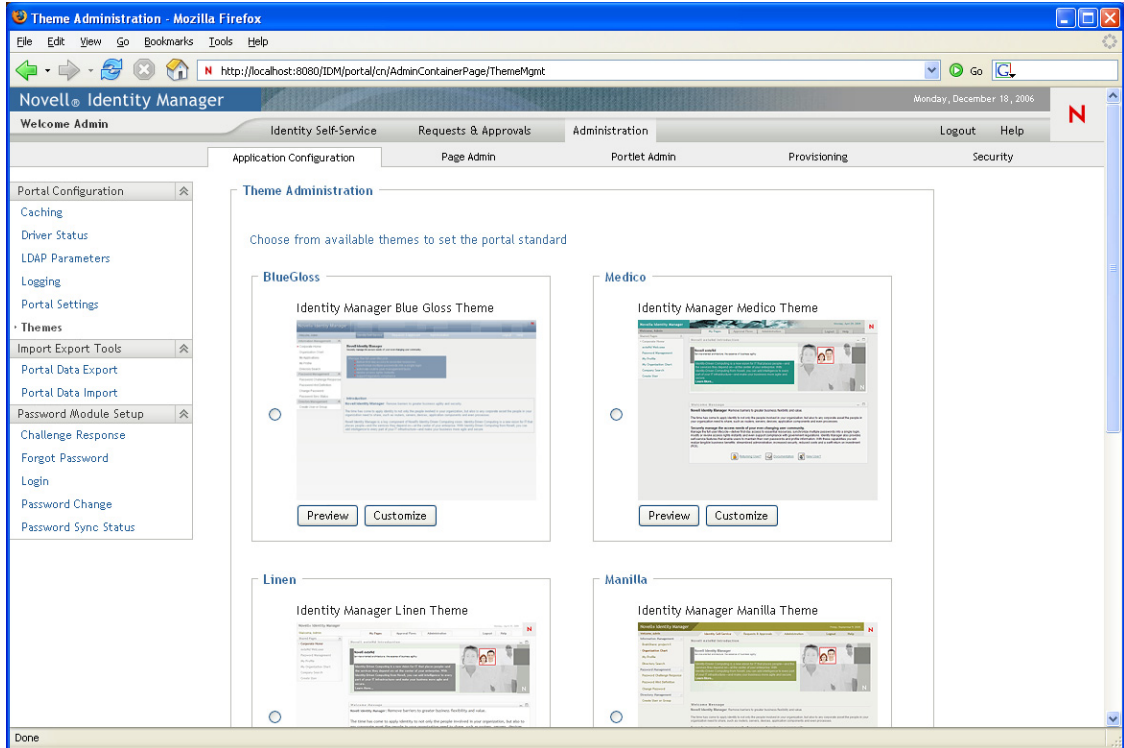
Portlet	Description
HeaderPortlet	Displays the header information and top-level tab controls for the user interface
Shared Page Navigation	Displays a vertical menu from which the user can select a shared page to display
Portal Page Controller	Displays the shared page that the user has currently selected via the Shared Page Navigation portlet
Session Timeout Warning	Displays an alert message whenever a user's session is about to time out

After user login, DefaultContainerPage automatically opens the *Identity Self-Service* tab in HeaderPortlet.

## Admin Container Page

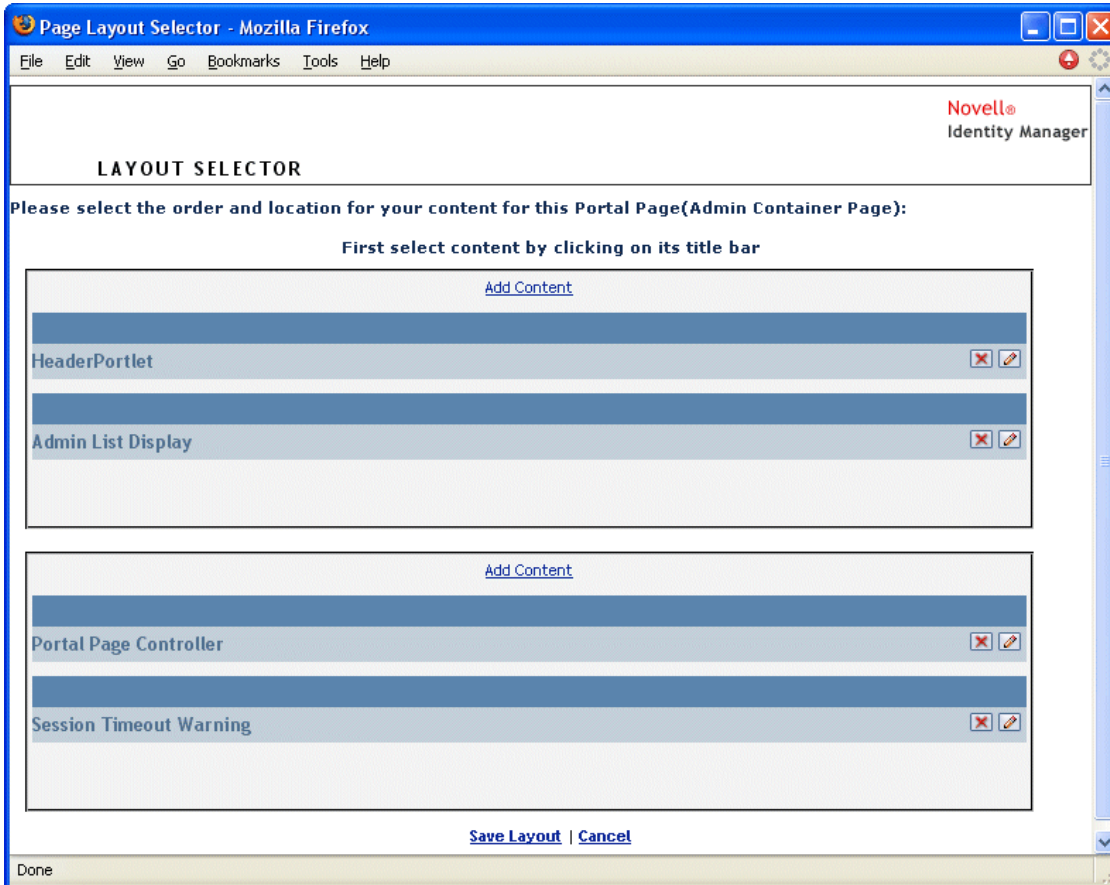
By default, when User Application Administrators (and other authorized users) click the *Administration* tab of the Identity Manager user interface, they go to the container page named Admin Container Page, which displays as shown in [Figure 6-5](#).

**Figure 6-5** Default Admin Container Page



Internally, Admin Container Page has the layout shown in [Figure 6-6](#).

**Figure 6-6** Admin Container Page Layout



The Admin Container Page layout is divided into two regions, which display the portlets described in [Table 6-4](#).

**Table 6-4** Default Admin Container Page Portlets

Portlet	Description
HeaderPortlet	Displays the header information and top-level tab controls for the user interface
Admin List Display	Displays a second level of tabs from which the user can select an administration action to perform
Portal Page Controller	Displays a shared page that corresponds to the tab currently selected by the user via the Admin List Display portlet
Session Timeout Warning	Displays an alert message whenever a user's session is about to time out

## 6.1.2 About Shared Pages

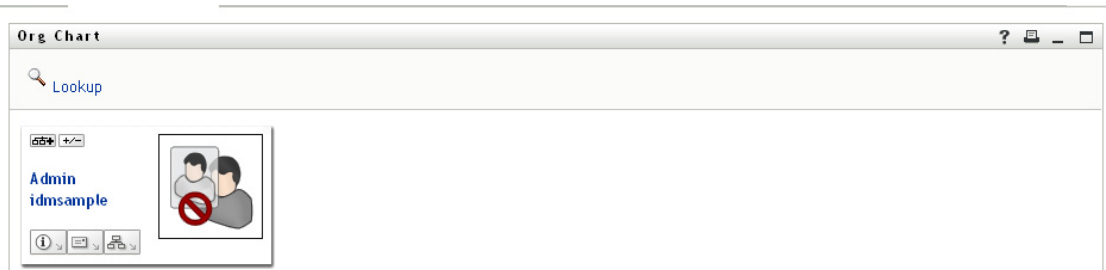
The Identity Manager user interface includes many shared pages, which provide the major content within its container pages. You can modify these shared pages if necessary. You also have the option of adding your own shared pages.

To learn about working with shared pages, see [Section 6.3, “Creating and Maintaining Shared Pages,”](#) on page 155.

### A Typical Shared Page

As an example of one of these shared pages, Organization Chart is the default shared page that DefaultContainerPage displays after users log in to the Identity Manager user interface. It is shown in [Figure 6-7](#).

**Figure 6-7** Sample Shared Page



Internally, Organization Chart has the layout shown in [Figure 6-8](#).

Figure 6-8 Default Org Chart Layout



The Organization Chart layout consists of just one region, which displays just one portlet (the Org Chart portlet).

### 6.1.3 An Exception to Page Usage

In this section, you have seen how these top-level tabs of the Identity Manager user interface are based on pages:

- ♦ The *Identity Self-Service* tab uses the DefaultContainerPage
- ♦ The *Administration* tab uses the Admin Container Page

However, the *Requests & Approvals* tab is based on a different architecture and cannot be manipulated through Page Admin.

## 6.2 Creating and Maintaining Container Pages

The process of creating and maintaining container pages involves the following steps:

- 1 Create a new container page or select an existing container page, as described in [Section 6.2.1, "Creating Container Pages,"](#) on page 148.

- 2** Add content (in the form of portlets) to the page, as described in [Section 6.2.2, “Adding Content to a Container Page,” on page 150](#).  
You can also delete content from the page, as described in [Section 6.2.3, “Deleting Content from a Container Page,” on page 152](#).
- 3** Choose a portal layout, as described in [Section 6.2.4, “Modifying the Layout of a Container Page,” on page 153](#).
- 4** Arrange the order and position of content on the selected layout, as described in [Section 6.2.5, “Arranging Content on the Container Page,” on page 153](#).
- 5** Immediately display the new page by specifying the container page URL in your browser, as described in [Section 6.2.6, “Displaying a Container Page,” on page 155](#).

You can switch layouts for container pages without losing page contents. When you apply a new layout to a container page, portlets in the page are automatically displayed using the new layout. You might need to fine-tune the content placement in the new layout.

## 6.2.1 Creating Container Pages

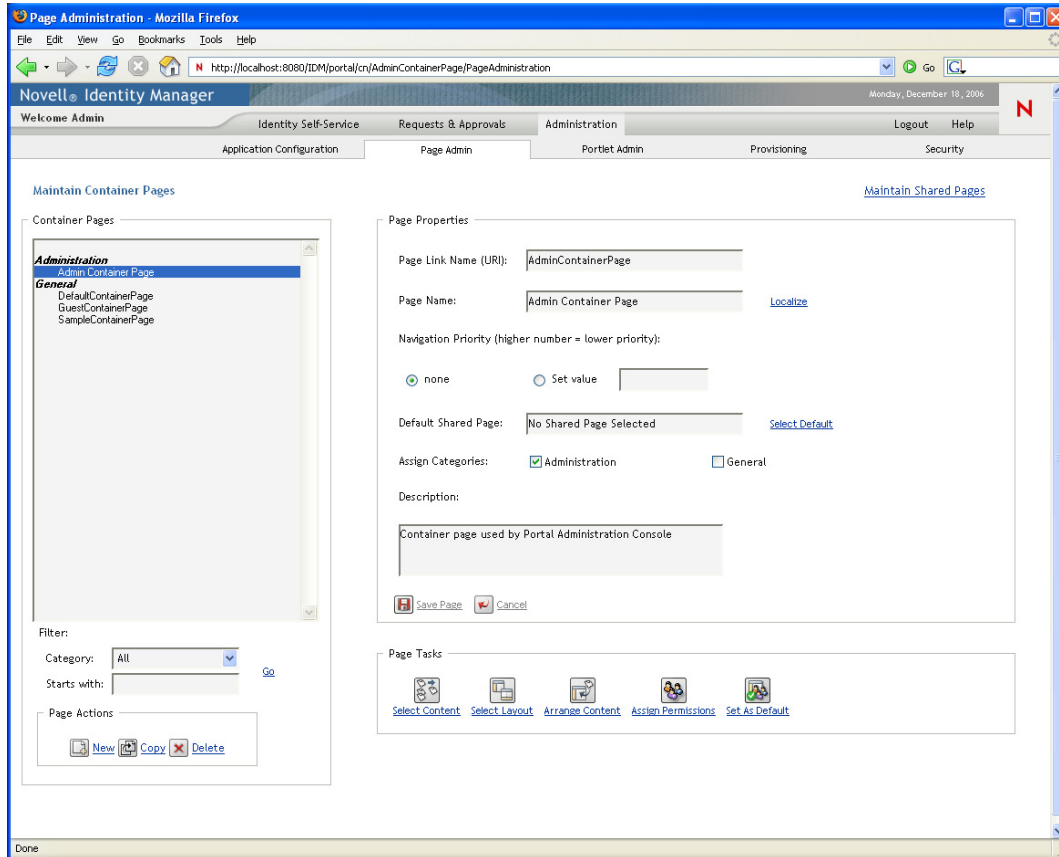
You can create container pages from scratch or by copying existing pages. This section describes both procedures.

To create a container page from scratch:

- 1** On the Page Admin page, select *Maintain Container Pages*.



The Maintain Container Pages panel displays:



2 Select the *New* page action (in the bottom left section of the panel).

An untitled, uncategorized container page is created.

3 Specify the page properties of the container page:

Property	What to do
Page Link Name (URI)	<p>Specify the URI name for the page (as it is to appear within the user interface URL). For example, if you specify the URI:</p> <p><code>MyContainerPage</code></p> <p>it appears within the URL like this:</p> <p><code>http://myappserver:8080/IDM/portal/cn/MyContainerPage</code></p>
Page Name	<p>Specify the display name for the page. For example:</p> <p><code>My Container Page</code></p> <p>Click <i>Localize</i> to specify localized versions of this name for other languages.</p>

Property	What to do
Navigation Priority	<p>Specify one of the following:</p> <ul style="list-style-type: none"> <li>◆ <i>None</i> if you don't need to assign a priority to this container page.</li> <li>◆ <i>Set value</i> to assign a priority to this container page, relative to other container pages. The priority must be an integer between 0 and 9999, where 0 is the highest priority and 9999 is the lowest.</li> </ul> <p>Setting priority values is useful if you want to ensure a particular order when pages are listed by priority, or if you want to ensure a particular selection when multiple default pages exist (in the case of a user who belongs to multiple groups).</p>
Default Shared Page	See <a href="#">Section 6.6, "Selecting a Default Shared Page for a Container Page,"</a> on page 170.
Assign Categories	<p>Select zero or more of the following categories in which you want the page to belong:</p> <ul style="list-style-type: none"> <li>◆ Administration</li> <li>◆ General</li> </ul> <p>Assigning categories is useful if you want to ensure proper organization when pages are listed by category, or if you want to ensure an appropriate subset when pages are filtered by category.</p>
Description	Type text that describes the page.

- 4 Click *Save Page* (at the bottom of the page properties section).

To create a container page by copying an existing page:

- 1 On the Page Admin page, select *Maintain Container Pages*.

The Maintain Container Pages panel displays (as shown in the previous procedure).

- 2 In the list of container pages, select the page you want to copy.

If the list is long, you can refine it (by category or starting text) to more easily find the desired page.

- 3 Select the *Copy* page action (in the bottom left section of the panel).

A new container page is created with the name `Copy of OriginalPageName`.

- 4 Specify the page properties of the container page (as described in the previous procedure).

- 5 Click *Save Page* (at the bottom of the page properties section).

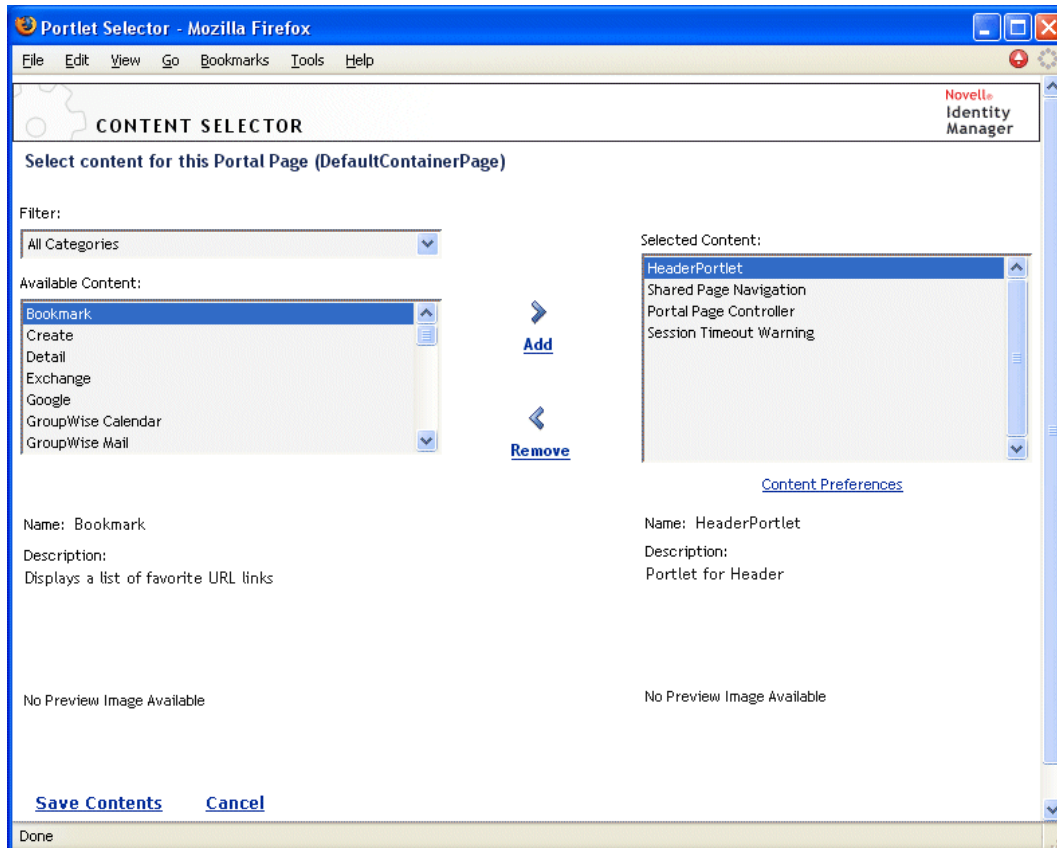
## 6.2.2 Adding Content to a Container Page

After you create a container page, the next step is to add content by selecting portlets to place on the page. You can use prebuilt portlets supplied with the Identity Manager User Application or other portlets you have registered.

To add content to a container page:

- 1 Open a new or existing page on the Maintain Container Pages panel, then click the *Select Content* page task (at the bottom of the panel).

The Content Selector displays in a new browser window:



- 2 If you want to display a specific category of available content, select a category from the *Filter* list.
- 3 Select one or more portlets from the *Available Content* list.  
Hold down Control to select multiple non-contiguous portlets from the list; use Shift to make multiple contiguous selections.
- 4 Click *Add* to move your choices to the *Selected Content* list.
- 5 You can click *Content Preferences* to edit the preferences of any portlet you have selected for your container page. The preference values you specify take effect for the instance of the portlet that appears on your page.
- 6 Click *Save Contents*.

Now that you have chosen the content for your container page, you can select a new layout as described in [Section 6.2.4, “Modifying the Layout of a Container Page,” on page 153](#), or arrange the content on the current layout as described in [Section 6.2.5, “Arranging Content on the Container Page,” on page 153](#).

## 6.2.3 Deleting Content from a Container Page

In the process of creating container pages, you might want to delete content by removing portlets from a page. You can use the Content Selector or Layout Selector, as described in the following procedures.

To delete content from a container page using the Content Selector:

- 1 Open a page on the Maintain Container Pages panel, then click the *Select Content* page task (at the bottom of the panel).

The Content Selector displays in a new browser window as shown in [Step 1 on page 151](#).

- 2 Select a portlet you want to delete from the *Selected Content* list and click *Remove*.

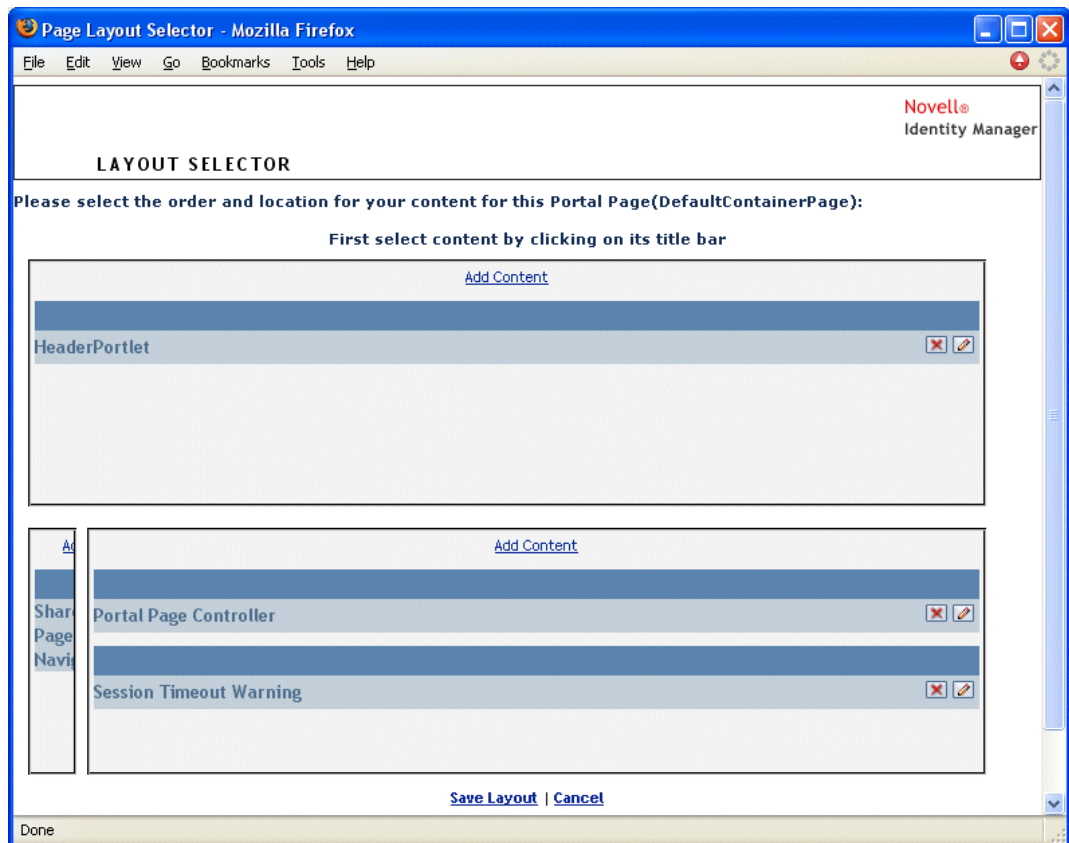
The portlet is removed from the page.

- 3 Click *Save Contents*.

To delete content from a container page using the Layout Selector:

- 1 Open a page on the Maintain Container Pages panel, then click the *Arrange Content* page task (at the bottom of the panel).

The Layout Selector displays in a new browser window, showing the portlets on that page:



- 2 Click the *X* button for a portlet you want to remove.
- 3 When you're prompted for confirmation, click *OK*.

The portlet is removed from the page.

- 4 Click *Save Layout*.

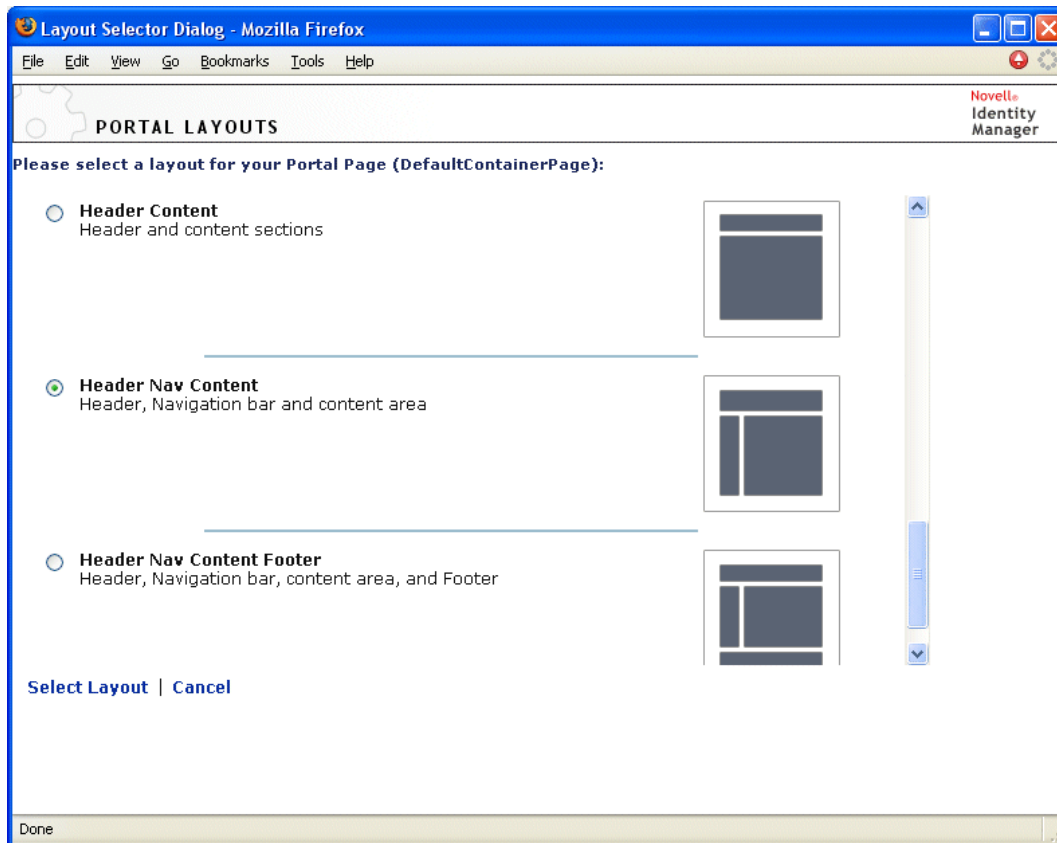
## 6.2.4 Modifying the Layout of a Container Page

When you modify the layout of a container page, existing content is shifted to accommodate the new layout. In some cases, you might need to fine-tune the end result.

To modify the layout of a container page:

- 1 Open a page on the Maintain Container Pages panel, then click the *Select Layout* page task (at the bottom of the panel).

The Portal Layouts list displays in a new browser window:



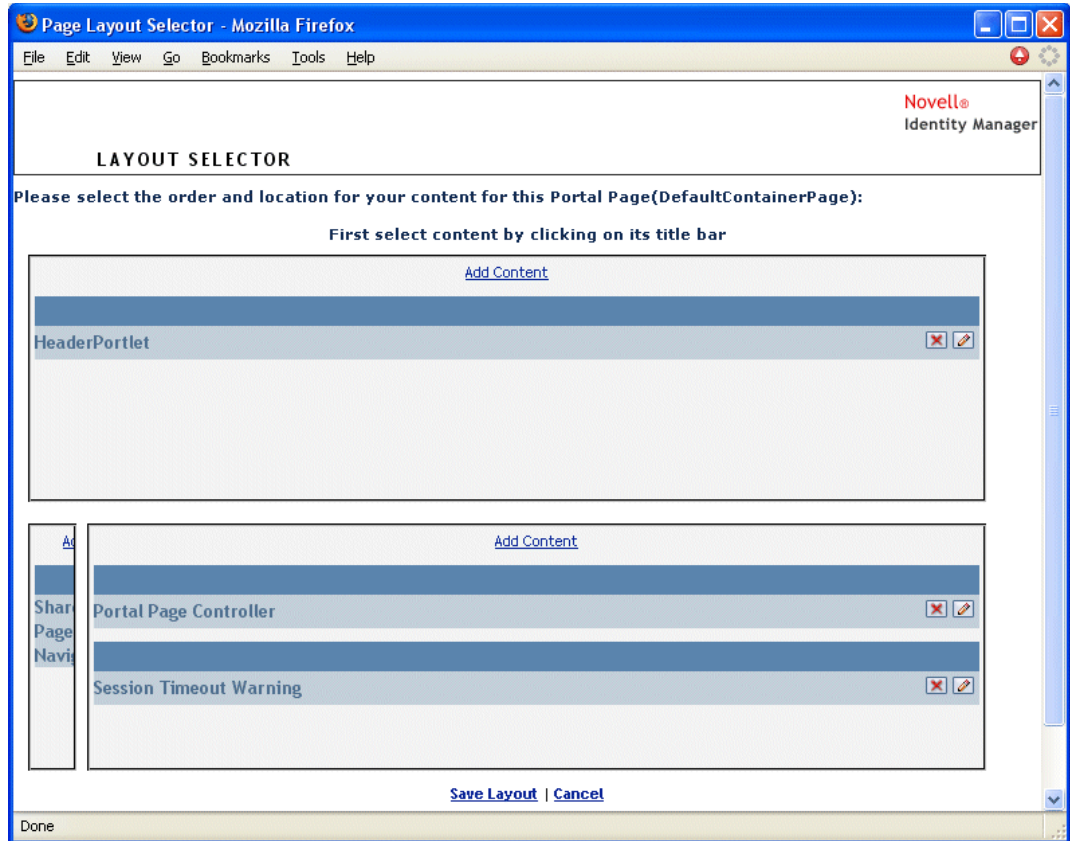
- 2 Scroll through the choices and select the layout you want.
- 3 Click *Select Layout*.

## 6.2.5 Arranging Content on the Container Page

After you have designated the content and layout for your container page, you can position the content in the selected layout, add other portlets in specific locations, or delete portlets.

- 1 Open a page on the Maintain Container Pages panel, then click the *Arrange Content* page task (at the bottom of the panel).

The Layout Selector displays in a new browser window, showing the portlets on that page:



**2** To add a portlet to the page:

**2a** Click *Add Content* in the desired layout frame.

The Portlet Selector displays in a new browser window.

**2b** If you want to display a specific category of available content, select a category from the *Filter* drop-down list.

**2c** Select a portlet you want from the *Available Content* list.

**2d** Click *Select Content*.

The Portlet Selector closes and the portlet you selected appears in the target layout frame of the Layout Selector.

**3** If you want to move a portlet to a different location in the layout, follow these browser-specific steps:

Browser	What to do
Internet Explorer	<ol style="list-style-type: none"> <li>1. Move your cursor over the title bar of the portlet until the cursor changes to a hand shape.</li> <li>2. Hold down the left mouse button and drag the portlet to the desired location in the layout.</li> </ol>

Browser	What to do
Mozilla	<ol style="list-style-type: none"> <li>1. Click the portlet you want to move.</li> <li>2. Click inside the destination layout frame.</li> </ol> <p>The portlet moves to the destination.</p>

- 4 If you want to remove a portlet from the layout, follow these steps:
  - 4a Click the *X* button for the portlet you want to remove.
  - 4b When you're prompted for confirmation, click *OK*.  
The portlet is removed from the layout.
- 5 To edit the preferences of a portlet:
  - 5a Click the pencil button for the portlet you want to edit.  
The portlet's *Content Preferences* display in your browser.
  - 5b Change preference values, as appropriate.  
The preference values you specify take effect for the instance of the portlet that appears on your page.
  - 5c Click *Save Preferences*.
- 6 Click *Save Layout* to record your changes and close the Layout Selector.

## 6.2.6 Displaying a Container Page

You can display your page by going to the container page URL in your browser. Specify the following URL in your web browser:

```
http://server:port/IDM-war-context/portal/cn/container-page-name
```

For example, to display the container page named MyContainerPage:

```
http://myappserver:8080/IDM/portal/cn/MyContainerPage
```

## 6.3 Creating and Maintaining Shared Pages

The process of creating and maintaining shared pages involves the following steps:

- 1 Create a new shared page or select an existing shared page, as described in [Section 6.3.1, "Creating Shared Pages,"](#) on page 156.
- 2 Add content (in the form of portlets) to the page, as described in [Section 6.3.2, "Adding Content to a Shared Page,"](#) on page 158.  
You might also want to delete content from the page, as described in [Section 6.3.3, "Deleting Content from a Shared Page,"](#) on page 160.
- 3 Choose a portal layout, as described in [Section 6.3.4, "Modifying the Layout of a Shared Page,"](#) on page 161.
- 4 Arrange the order and position of content on the selected layout, as described in [Section 6.3.5, "Arranging Content on the Shared Page,"](#) on page 161.
- 5 Display the new page by entering the shared page URL in your browser, as described in [Section 6.3.6, "Displaying a Shared Page,"](#) on page 163.



## Shared Pages and Layouts

Shared pages are not tightly bound to portal layouts. That means you can switch layouts for shared pages without losing any page contents. When a new layout is applied, any portlets that have been added to the page are automatically displayed using the new layout. You might need to fine-tune the content placement in the new layout.

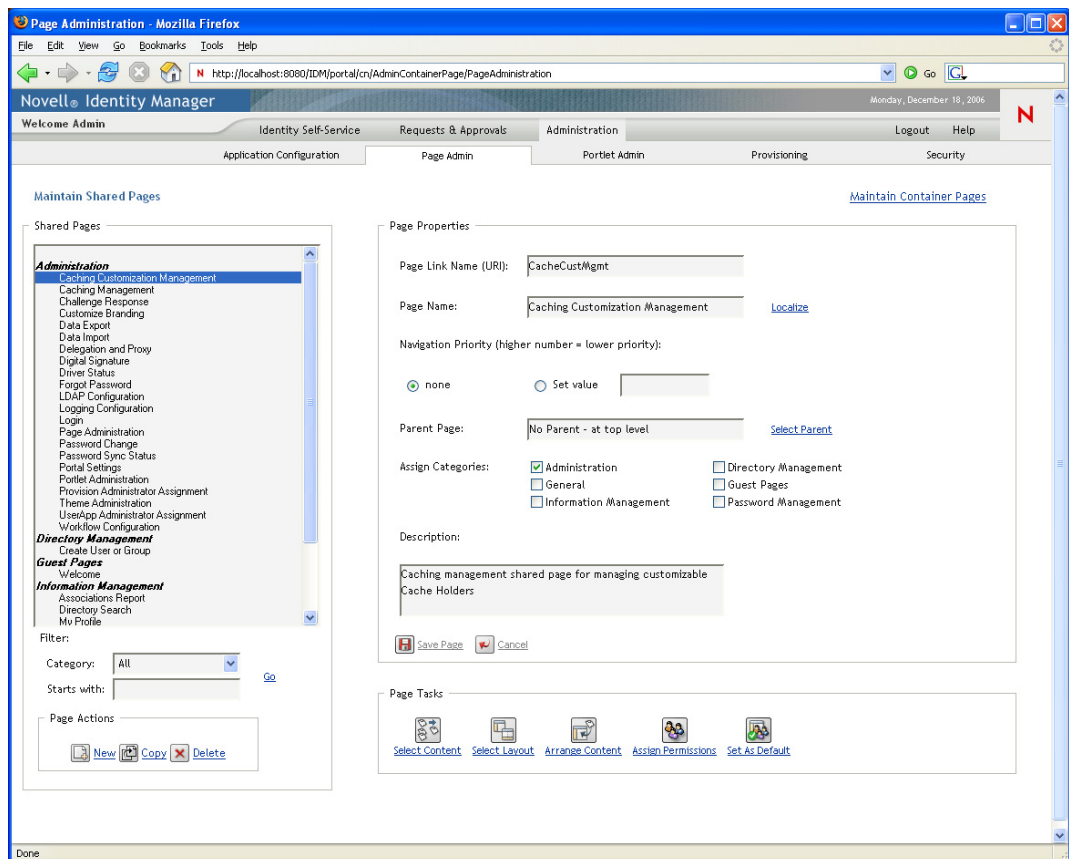
### 6.3.1 Creating Shared Pages

You can create shared pages from scratch or by copying existing pages. This section describes both procedures.

To create a shared page from scratch:

- 1 On the Page Admin page, select *Maintain Shared Pages*.

The Maintain Shared Pages panel displays:



- 2 Select the *New* page action (in the bottom left section of the panel).  
An untitled, uncategorized shared page is created.
- 3 Specify the page properties of the shared page:



Property	What to do
Page Link Name (URI)	<p>Specify the URI name for the page (as it is to appear within the user interface URL). For example, if you specify the URI:</p> <p>MySharedPage</p> <p>it appears within the URL like this:</p> <p><code>http://myappserver:8080/IDM/portal/cn/MyContainerPage/MySharedPage</code></p>
Page Name	<p>Specify the display name for the page. For example:</p> <p>My Shared Page</p> <p>You can click <i>Localize</i> to specify localized versions of this name for other languages.</p>
Navigation Priority	<p>Specify one of the following:</p> <ul style="list-style-type: none"> <li>◆ <i>None</i> if you don't need to assign a priority to this shared page.</li> <li>◆ <i>Set value</i> to assign a priority to this shared page, relative to other shared pages. The priority must be an integer between 0 and 9999, where 0 is the highest priority and 9999 is the lowest.</li> </ul> <p>Setting priority values is useful if you want to ensure a particular order when pages are listed by priority, or if you want to ensure a particular selection when multiple default pages exist (in the case of a user who belongs to multiple groups).</p>
Parent Page	<p>If you want this shared page to be the child of another shared page, click <i>Select Parent</i>. Make sure that both the parent and child pages belong to the <i>same categories</i> (to prevent display problems).</p> <p>At runtime, the end user sees this relationship when using the Shared Page Navigation portlet. When displaying the list of shared pages, it shows children indented under their parents.</p> <p>Child pages do not inherit content, preferences, or settings from their parent pages. Conversely, parent pages do not automatically display the content of child pages along with their own content.</p>

Property	What to do
Assign Categories	<p>Select zero or more of the following categories in which you want the page to belong:</p> <ul style="list-style-type: none"> <li>◆ Administration</li> <li>◆ Directory Management</li> <li>◆ General</li> <li>◆ Guest Pages</li> <li>◆ Information Management</li> <li>◆ Password Management</li> </ul> <p>Assigning categories is useful if you want to ensure proper organization when pages are listed by category, or if you want to ensure an appropriate subset when pages are filtered by category.</p> <hr/> <p><b>NOTE:</b> <i>Guest Pages</i> is a special category used to identify shared pages that can be displayed prior to user login but not after. For more information, see the section on the Shared Page Navigation portlet in <a href="#">Chapter 10, “About Portlets,” on page 209</a>.</p> <hr/>
Description	Type text that describes the page.

- 4 Click *Save Page* (at the bottom of the page properties section).

To create a shared page by copying an existing page:

- 1 On the Page Admin page, select *Maintain Shared Pages*.

The Maintain Shared Pages panel displays as shown in [“To create a shared page from scratch:” on page 156](#).

- 2 In the list of shared pages, select the page you want to copy.

If the list is long, you can refine it (by category or starting text) to more easily find the desired page.

- 3 Select the *Copy* page action (in the bottom-left section of the panel).

A new shared page is created with the name Copy of OriginalPageName.

- 4 Specify the page properties of the shared page as described in [“To create a shared page from scratch:” on page 156](#).

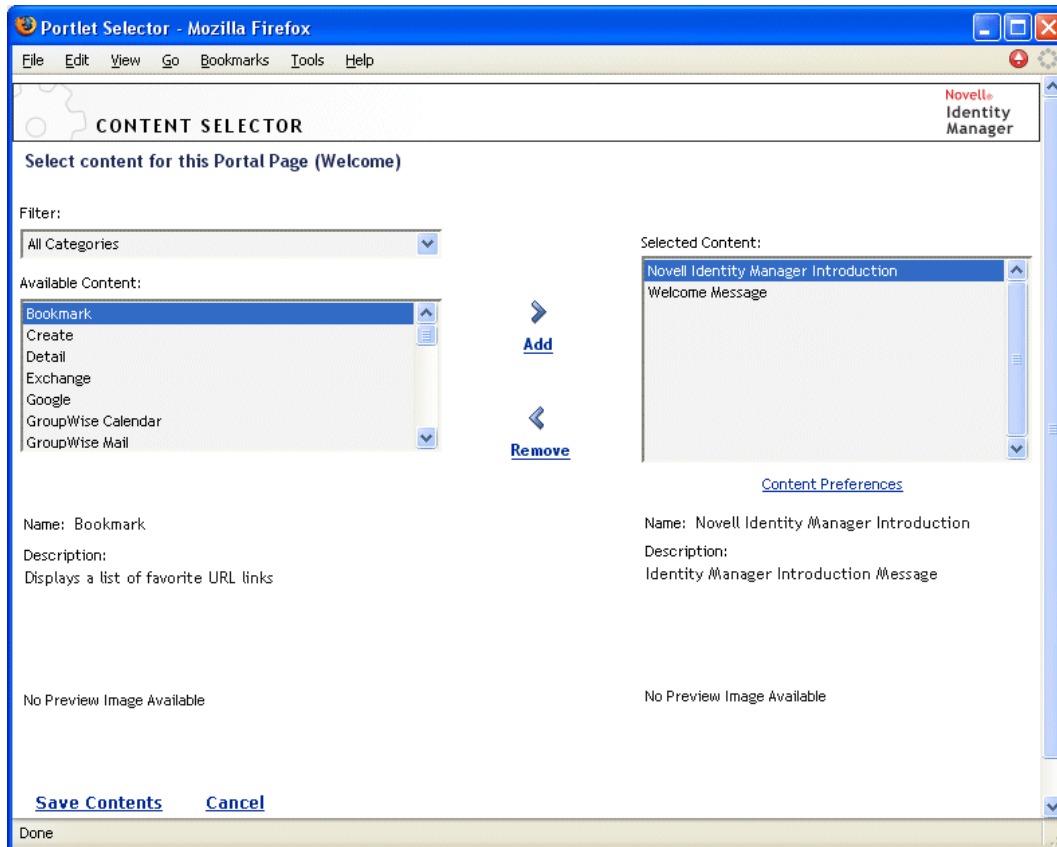
- 5 Click *Save Page* (at the bottom of the page properties section).

### 6.3.2 Adding Content to a Shared Page

After you create a shared page, the next step is to add content by selecting portlets to place on the page. You can use prebuilt portlets supplied with the Identity Manager User Application or other portlets you have registered.

- 1 Open a new or existing page on the Maintain Shared Pages panel, then click the *Select Content* page task (at the bottom of the panel).

The Content Selector displays in a new browser window:



- 2 If you want to display a specific category of available content, select a category from the *Filter* drop-down list.
- 3 Select one or more portlets from the *Available Content* list.  
Hold down the Ctrl key to select multiple non-contiguous portlets from the list; use the Shift key to make multiple contiguous selections.
- 4 Click *Add* to move your choices to the *Selected Content* list.
- 5 You can click *Content Preferences* to edit the preferences of any portlet you have selected for your shared page. The preference values you specify take effect for the instance of the portlet that appears on your page.
- 6 Click *Save Contents*.

Now that you have chosen the content for your shared page, you can select a new layout as described in [Section 6.3.4, “Modifying the Layout of a Shared Page,” on page 161](#), or arrange the content on the current layout as described in [Section 6.3.5, “Arranging Content on the Shared Page,” on page 161](#).

### 6.3.3 Deleting Content from a Shared Page

In the process of creating shared pages, you might want to delete content by removing portlets from a page. You can use the Content Selector or Layout Selector, as described in the following procedures.

- 1 Open a page on the Maintain Shared Pages panel, then click the *Select Content* page task (at the bottom of the panel).

The Content Selector displays in a new browser window as shown in [Section 6.3.2, “Adding Content to a Shared Page,” on page 158](#).

- 2 Select a portlet you want to delete from the *Selected Content* list and click *Remove*.

The portlet is removed from the page.

- 3 Click *Save Contents*.

To delete content from a shared page by using the Layout Selector:

- 1 Open a page on the Maintain Shared Pages panel, then click the *Arrange Content* page task (at the bottom of the panel).

The Layout Selector displays in a new browser window, showing the portlets on that page:



- 2 Click the *X* button for a portlet you want to remove.

- 3 When you're prompted for confirmation, click *OK*.

The portlet is removed from the page.

- 4 Click *Save Layout*.

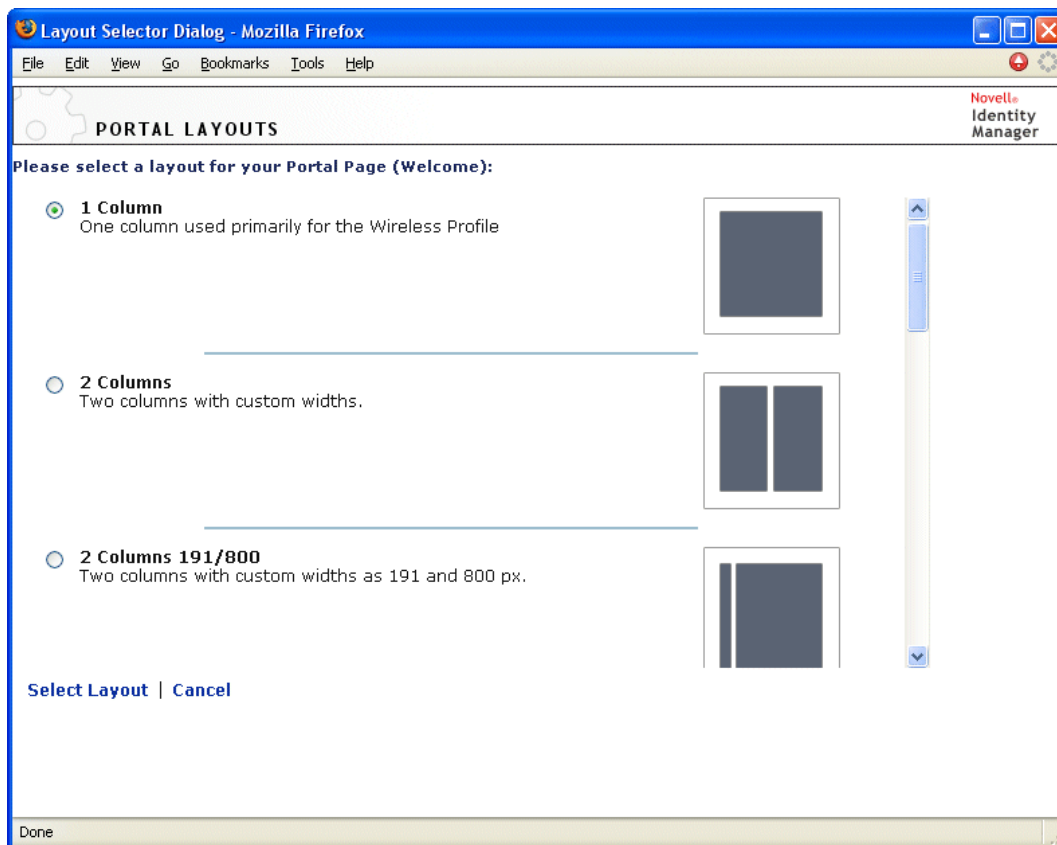
## 6.3.4 Modifying the Layout of a Shared Page

When you modify the layout of a shared page, existing content is shifted to accommodate the new layout. In some cases, you might need to fine-tune the end result.

To modify the layout of a shared page:

- 1 Open a page on the Maintain Shared Pages panel, then click the *Select Layout* page task (at the bottom of the panel).

The Portal Layouts list displays in a new browser window:



- 2 Scroll through the choices and select the layout you want.
- 3 Click *Select Layout*.

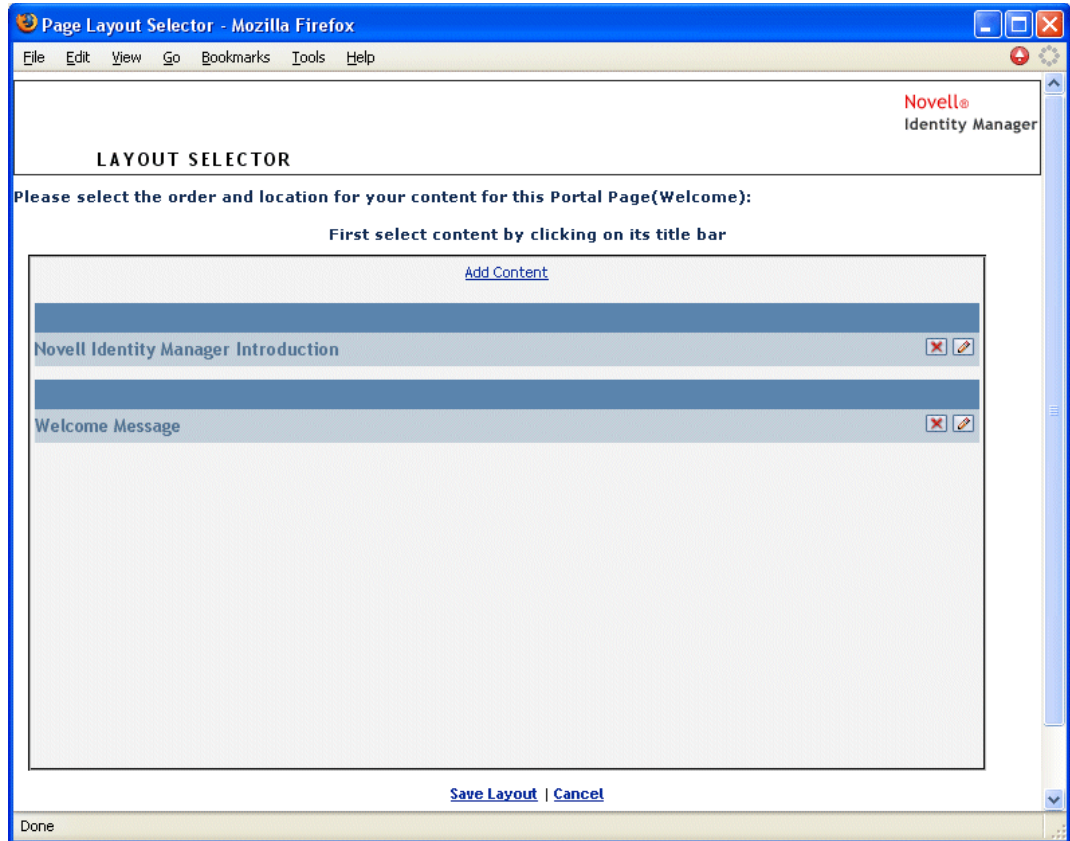
## 6.3.5 Arranging Content on the Shared Page

After you have designated the content and layout for your shared page, you can position the content in the selected layout, add other portlets in specific locations, or delete portlets.

To arrange content on a shared page:

- 1 Open a page on the Maintain Shared Pages panel, then click the *Arrange Content* page task (at the bottom of the panel).

The Layout Selector displays in a new browser window, showing the portlets on that page:



**2** If you want to add a portlet to the page:

**2a** Click *Add Content* in the desired layout frame.

The Portlet Selector displays in a new browser window.

**2b** If you want to display a specific category of available content, select a category from the *Filter* drop-down list.

**2c** Select a portlet you want from the *Available Content* list.

**2d** Click *Select Content*.

The Portlet Selector closes and the portlet you selected appears in the target layout frame of the Layout Selector.

**3** If you want to move a portlet to a different location in the layout, follow these browser-specific steps:

Browser	What to do
Internet Explorer	<ol style="list-style-type: none"> <li>1. Move your cursor over the title bar of the portlet until the cursor changes to a hand shape.</li> <li>2. Hold down the left mouse button and drag the portlet to the desired location in the layout.</li> </ol>

Browser	What to do
Mozilla Firefox	<ol style="list-style-type: none"> <li>1. Click the portlet you want to move.</li> <li>2. Click inside the destination layout frame.</li> </ol> <p>The portlet moves to the destination.</p>

- 4 If you want to remove a portlet from the layout:
  - 4a Click the *X* button for the portlet you want to remove.
  - 4b When you're prompted for confirmation, click *OK*.  
The portlet is removed from the layout.
- 5 If you want to edit the preferences of a portlet:
  - 5a Click the pencil button for the portlet you want to edit.  
The portlet's Content Preferences display in your browser.
  - 5b Change preference values, as appropriate.  
The preference values you specify take effect for the instance of the portlet that appears on your page.
  - 5c Click *Save Preferences*.
- 6 Click *Save Layout* to record your changes and close the Layout Selector.

### 6.3.6 Displaying a Shared Page

To display your shared page, go to this URL in your Web browser:

`http://server:port/IDM-war-context/portal/pg/shared-page-name`

For example, to display the shared page named *MySharedPage*:

`http://myappserver:8080/IDM/portal/pg/MySharedPage`

## 6.4 Assigning Permissions for Pages

You can assign permission to other users, groups, and containers to work with specific container pages and shared pages. Two security levels of permission can be assigned.

**Table 6-5** *Page Permissions*

Permission	Description	Can be assigned for
View	Allows a user, group, or container to access the page and see it in a list of available pages	Container pages and shared pages
Ownership	Allows a user, group, or container to modify the content and layout of the page, and to assign View and Ownership permission to other users, groups, and containers	Shared pages

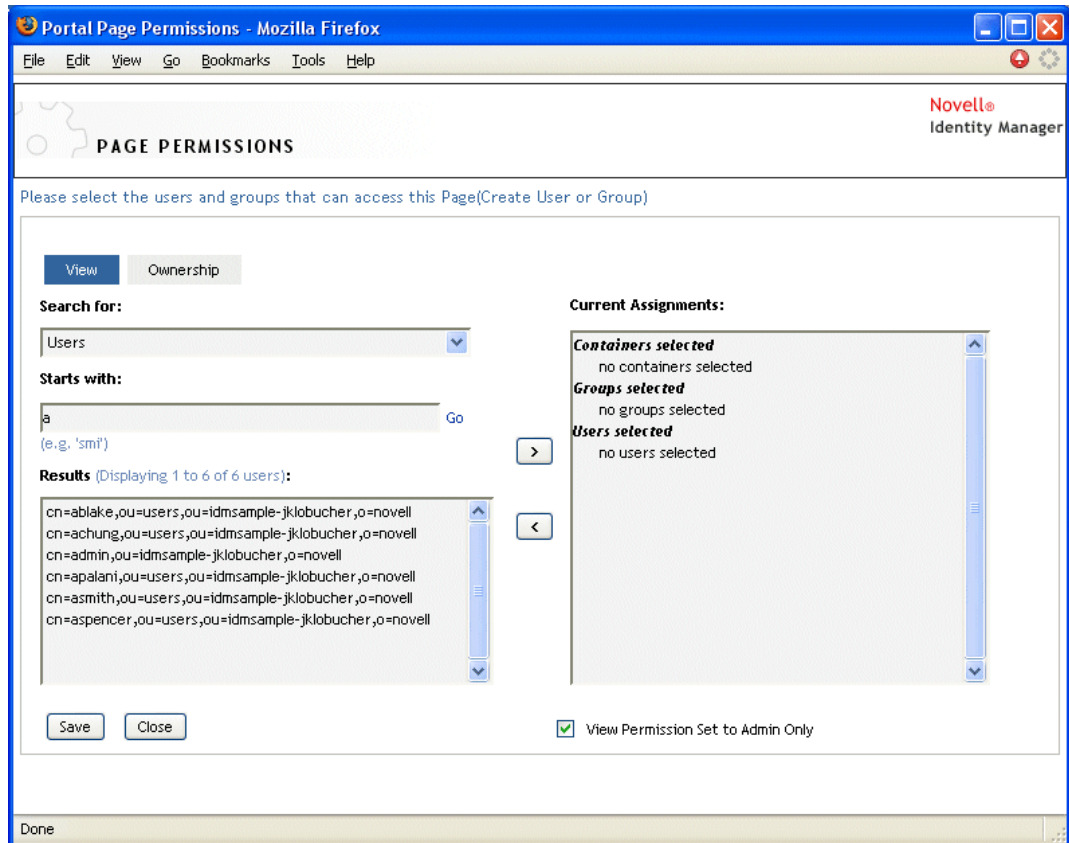
## 6.4.1 Assigning Page View Permission

When you assign users View permission for a container page or shared page, they can access the page and see it in a list of available pages.

To assign View permission for container pages or shared pages:

- 1 Open a page on the Maintain Container Pages panel or the Maintain Shared Pages panel, then click the *Assign Permissions* page task (at the bottom of the panel).

The Page Permissions dialog box displays in a new browser window:



- 2 Go to the *View* tab.
- 3 Specify values for the following search settings:

Setting	What to do
<i>Search for</i>	Select one of the following from the drop-down menu: <ul style="list-style-type: none"><li>◆ Users</li><li>◆ Groups</li><li>◆ Containers</li></ul>



Setting	What to do
<i>Starts with</i>	<p>If you want to:</p> <ul style="list-style-type: none"> <li>◆ Find all available objects of your specified type (user, group, or container), then make this setting blank.</li> <li>◆ Find a subset of those objects, then enter the starting characters of the CN values you want. (Case is not considered. Wildcards are not supported.)</li> </ul> <p>For example, searching for groups that start with <i>s</i> would narrow your search results to something like this:</p> <pre>cn=Sales,ou=groups,o=MyOrg cn=Service,ou=groups,o=MyOrg cn=Shipping,ou=groups,o=MyOrg</pre> <p>Searching for groups that start with <i>Se</i> would return:</p> <pre>cn=Service,ou=groups,o=MyOrg</pre>

**4** Click *Go*.

The results of your search appear in the *Results* list.

**5** Select the users, groups, or containers you want to assign to the page, then click the *Add (>)* button.

Hold down the Ctrl key to make multiple selections.

**6** Enable or disable page lock-down as follows:

If you want to	Do this
Lock down the page so only User Application Administrators can view it	Select <i>View Permission Set to Admin Only</i>
Allow all assigned users, groups, and containers to view the page	Deselect <i>View Permission Set to Admin Only</i>

**NOTE:** If you deselect this setting but there are no users, groups, or containers explicitly assigned to the page, then everyone has View permission for this page.

**7** Click *Save*, then click *Close*.

## 6.4.2 Assigning Shared Page Owners

Users who own shared pages can modify the content of the pages they own and change the preferences of portlets on those pages.

To assign Ownership permission for shared pages:

**1** Open a page on the Maintain Shared Pages panel, then click the *Assign Permissions* page task (at the bottom of the panel).

The Page Permissions dialog box displays in a new browser window as shown in [Step 1 on page 164](#).

**2** Go to the *Ownership* tab.

### 3 Specify values for the following search settings:

Setting	What to do
<i>Search for</i>	Select one of the following from the drop-down menu: <ul style="list-style-type: none"><li>◆ Users</li><li>◆ Groups</li><li>◆ Containers</li></ul>
<i>Starts with</i>	If you want to: <ul style="list-style-type: none"><li>◆ Find all available objects of your specified type (user, group, or container), then make this setting blank.</li><li>◆ Find a subset of those objects, then enter the starting characters of the CN values you want. (Case is not considered. Wildcards are not supported.)</li></ul> <p>For example, searching for groups that start with <i>s</i> would narrow your search results to something like this:</p> <pre>cn=Sales,ou=groups,o=MyOrg cn=Service,ou=groups,o=MyOrg cn=Shipping,ou=groups,o=MyOrg</pre> <p>Searching for groups that start with <i>Se</i> would return:</p> <pre>cn=Service,ou=groups,o=MyOrg</pre>

#### 4 Click *Go*.

The results of your search appear in the *Results* list.

#### 5 Select the users, groups, or containers you want to assign to the page, then click the *Add (>)* button.

Hold down the Ctrl key to make multiple selections.

#### 6 Enable or disable page lock-down as follows:

If you want to	Do this
Lock down the page so only User Application Administrators can work with it	Select <i>Ownership Permission Set to Admin Only</i>
Allow all assigned users, groups, and containers to work with the page	Deselect <i>Ownership Permission Set to Admin Only</i>

**NOTE:** If you deselect this setting but there are no users, groups, or containers explicitly assigned to the page, then everyone has Ownership permission for this page.

#### 7 Click *Save*, then click *Close*.

### 6.4.3 Enabling User Access to the Create User or Group Page

By default, only User Application Administrators can see and use the Create User or Group page, which is a shared page on the *Identity Self-Service* tab of the Identity Manager user interface. But, where appropriate, a User Application Administrator can assign permission for one or more end

users to access that page. For instance, selected people in administration or management positions might need the ability to create users, groups, or task groups.

### To give users access to the Create User or Group page:

- 1 On the Maintain Shared Pages panel, open the page named Create User or Group.
- 2 Use the *Assign Permissions* page task to give View permission to the appropriate users, groups, or containers for the Create User or Group shared page.
- 3 Switch from Page Admin to Portlet Admin, and open the CreatePortlet portlet registration (which is used on the Create User or Group page).
- 4 Use the Security panel to give List and Execute permissions to the appropriate users, groups, or containers for the CreatePortlet portlet registration.

For more information about assigning permissions for portlets, see [Chapter 7, “Portlet Administration,” on page 173](#).

- 5 Go to iManager and use an administrator account to log in to the tree for your Identity Vault.
- 6 Make sure that the people who will be using Create User or Group have Create rights for the [Entry Rights] property on the containers in which objects (users, groups, or task groups) will be created.

For example, you can modify trustees for a chosen container and add the appropriate users, groups, or containers as trustees. Then, for each trustee, you can assign the following rights:

Property name	Assigned rights	Inherit
[All Attributes Rights]	<ul style="list-style-type: none"> <li>◆ Compare</li> <li>◆ Read</li> <li>◆ Write</li> </ul>	Yes (select this check box)
[Entry Rights]	<ul style="list-style-type: none"> <li>◆ Browse</li> <li>◆ Create</li> </ul>	Yes (select this check box)

If you don't assign the necessary rights in the Identity Vault (or if those rights can't somehow be derived), an end user might get an error message such as this one from Create User or Group:

```
User 'cn=mmackenzie,ou=users,ou=idmsample,o=novell' does not have
permission
to create 'cn=MyNewGroup,ou=groups,ou=idmsample,o=novell' or
modify related
objects.
```

To learn how the Create User or Group page is used (by those with access to it), see the *Identity Manager User Application: User Guide*.

## 6.4.4 Enabling User Access to Individual Administration Pages

By default, only User Application Administrators can access the *Administration* tab of the Identity Manager user interface and the pages contained on that tab (Application Configuration, Page Admin, Portlet Admin, Provisioning, Security). But if necessary, a User Application Administrator can assign permission for one or more end users to see and use specific pages on the *Administration*

tab. For example, a small group of users might need to change themes periodically, even though they are not User Application Administrators.

**To give users access to individual Administration pages:**

- 1 On the Maintain Container Pages panel, open *Admin Container Page*.  
  
This is the container page that's used when you go to the *Administration* tab of the Identity Manager user interface.
- 2 Use the *Assign Permissions* page task to give View permission to the appropriate users, groups, or containers for Admin Container Page.
- 3 On the Maintain Shared Pages panel, open the appropriate Administration page (one of the shared pages under the category Administration).
- 4 Use the *Assign Permissions* page task to give View and Ownership permissions to the appropriate users, groups, or containers for that shared page.
- 5 Make sure the specified users, groups, or containers have Execute permission for each portlet used on a specified page (if you have restricted those portlets).

For more information about assigning permissions for portlets, see [Chapter 7, "Portlet Administration," on page 173](#).

## 6.5 Setting Default Pages for Groups

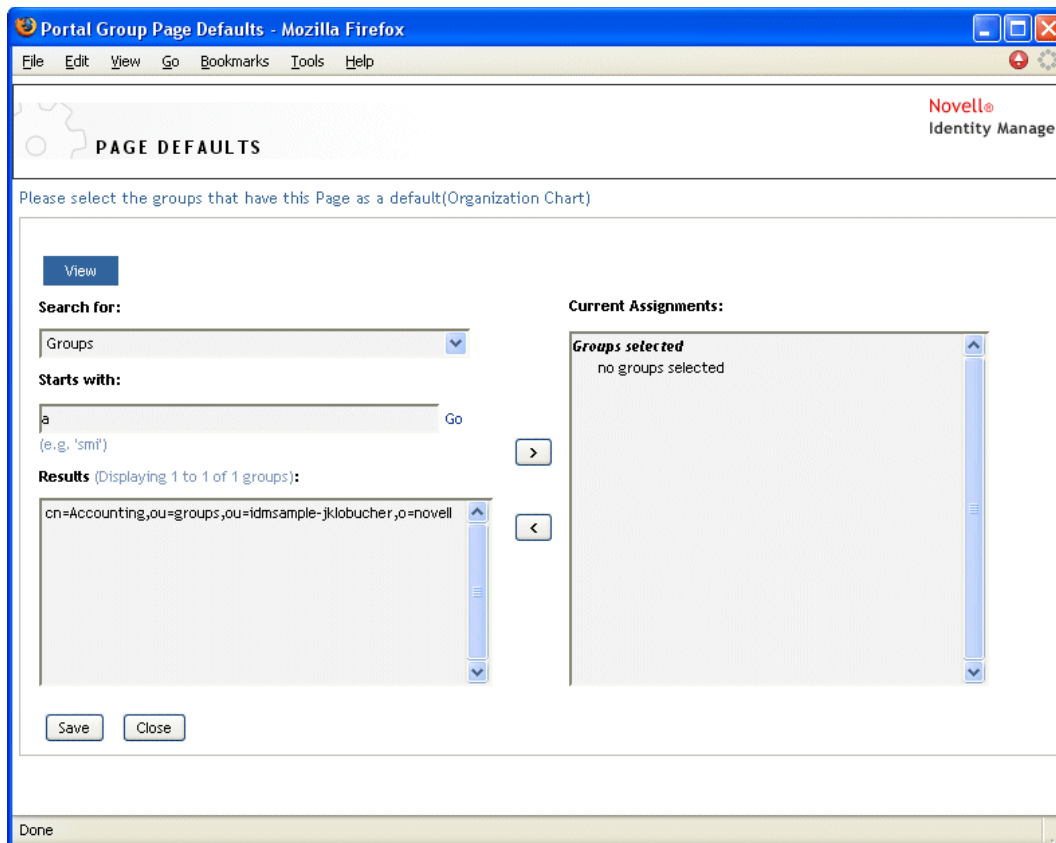
You can assign a default container page and a default shared page for any authorized group of users. These settings affect the container page those users see when they log in and the shared page they see on the container page.

When users belong to multiple groups with default page assignments, Navigation Priority is used in determining which container page and shared page to display.

To assign a default container page or a default shared page to a group:

- 1 Open a page on the Maintain Container Pages panel or the Maintain Shared Pages panel, then click the *Set As Default* page task (at the bottom of the panel).

The Page Defaults dialog box displays in a new browser window:



**2** Specify values for the following search settings:

Setting	What to do
Search for	Groups is automatically selected.
Starts with	<p>If you want to:</p> <ul style="list-style-type: none"> <li>Find all available groups, then make this setting blank.</li> <li>Find a subset of those groups, then enter the starting characters of the CN values you want. (Case is not considered. Wildcards are not supported.)</li> </ul> <p>For example, searching for groups that start with <i>s</i> would narrow your search results to something like this:</p> <pre>cn=Sales,ou=groups,o=MyOrg cn=Service,ou=groups,o=MyOrg cn=Shipping,ou=groups,o=MyOrg</pre> <p>Searching for groups that start with <i>Se</i> would return:</p> <pre>cn=Service,ou=groups,o=MyOrg</pre>

**3** Click *Go*.

The results of your search appear in the *Results* list.

**4** Select the groups for whom this page is to be a default, then click the *Add (>)* button.

Hold down the Ctrl key to make multiple selections.

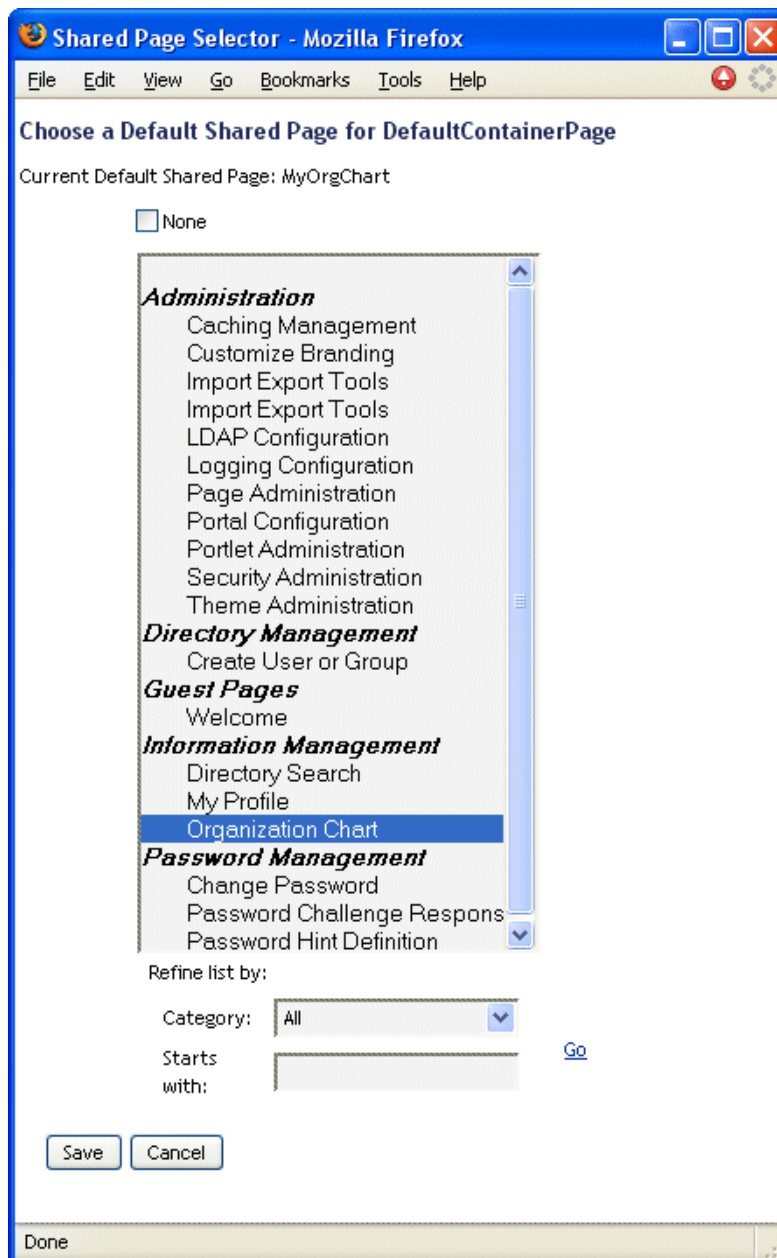
5 Click *Save*, then click *Close*.

## 6.6 Selecting a Default Shared Page for a Container Page

You can assign a default shared page to each container page you have. The user interface considers this page assignment when determining what to display.

- 1 Open a container page on the Maintain Container Pages panel.
- 2 In the page properties section, look for Default Shared Page and click *Select Default*.

The Choose a Default Shared Page dialog box displays in a new browser window:



- 3** If the shared page list is long, you can refine it by category or starting text to more easily find the desired page.
- 4** Select a shared page to use as the default for the container page or select *None* for no default.
- 5** Click *Save* to accept your selection and close the dialog.
- 6** Click *Save Page* (at the bottom of the page properties section).





# Portlet Administration

This section describes how to use the Portlet Admin page on the *Administration* tab of the Identity Manager user interface. Topics include:

- ◆ [Section 7.1, “About Portlet Administration,” on page 173](#)
- ◆ [Section 7.2, “Administering Portlet Definitions,” on page 173](#)
- ◆ [Section 7.3, “Administering Registered Portlets,” on page 177](#)

For more general information about accessing and working with the *Administration* tab, see [Chapter 4, “Using the Administration Tab,” on page 83](#).

## 7.1 About Portlet Administration

You can use the Portlet Admin page to control the portlets available in the Identity Manager user interface and who has permission to access them. Portlets are pluggable user-interface elements (based on a Java standard) that provide the content for pages in the user interface, including container pages and shared pages. [Table 7-1](#) describes how to manage portlets.

**Table 7-1** *Managing Portlets*

What you work with	Description
Portlet definitions	<p>Descriptors (read from <code>portlet.xml</code>) that specify portlet configuration parameters. There is one definition for each portlet in an application.</p> <p>See <a href="#">Section 7.2, “Administering Portlet Definitions,” on page 173</a>.</p>
Portlet registrations	<p>Registrations of portlets, based on their definitions. Multiple registrations of the same portlet can exist in a single portlet application.</p> <p>See <a href="#">Section 7.3, “Administering Registered Portlets,” on page 177</a>.</p>

For details on the portlets provided with the Identity Manager user interface, see [Part IV, “Portlet Reference,” on page 207](#). To learn about using portlets on container pages and shared pages, see [Chapter 6, “Page Administration,” on page 139](#).

## 7.2 Administering Portlet Definitions

The Portlet Admin page enables you to perform the following tasks related to portlet definitions in a portlet application:

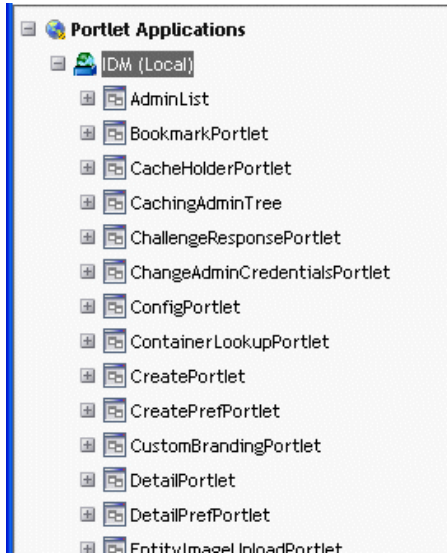
- ◆ [Section 7.2.1, “Accessing Portlet Definitions in the Deployed Portlet Application,” on page 174](#)
- ◆ [Section 7.2.2, “Registering Portlet Definitions,” on page 174](#)
- ◆ [Section 7.2.3, “Viewing Information About Portlet Definitions,” on page 175](#)

## 7.2.1 Accessing Portlet Definitions in the Deployed Portlet Application

The *Portlet Applications* list shows the portlet definitions in a selected portlet application.

In the *Portlet Applications* list, expand the portlet application whose portlet definitions you want to access.

The tree displays all of the portlet definitions under that portlet application:



## 7.2.2 Registering Portlet Definitions

Before you can use a portlet, you must register that portlet definition with the portal (Identity Manager User Application). A registered portlet definition is called a *portlet registration*. You can create multiple registrations for a single portlet, which enables you to put multiple instances of that portlet on the same page.

The portlet registration inherits all the preferences and settings of the portlet class, but you can modify these values in the following ways:

- ◆ When registering the portlet definition. See [Section 7.3, “Administering Registered Portlets,” on page 177](#)
- ◆ When adding an instance of the portlet to a page. See [Chapter 6, “Page Administration,” on page 139](#)

All portlets that ship with the Identity Manager User Application are automatically registered.

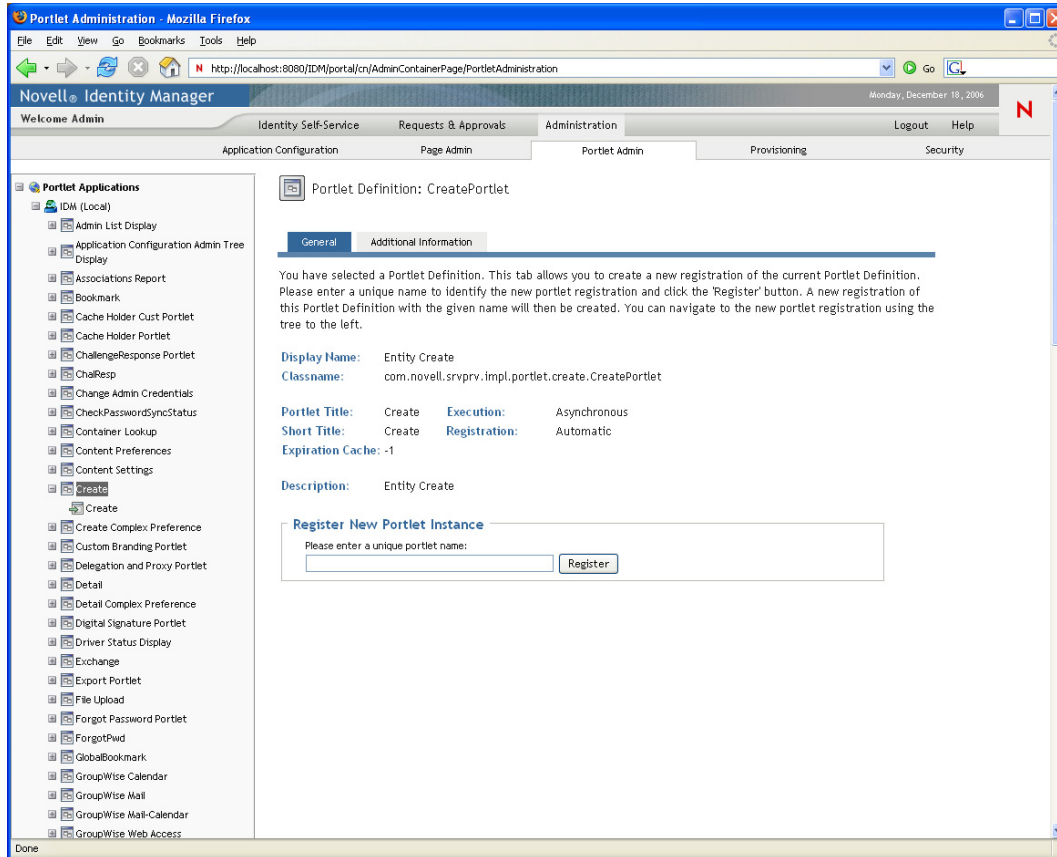
If the portlet definition provides an Edit mode, the end user can modify specific preferences of the portlet registration at runtime, according to the logic of the portlet’s `doEdit()` method.

The Identity Manager User Application also provides a default implementation for Edit mode. If the `doEdit()` method is not explicitly implemented, a default preference sheet is displayed.

To register a portlet definition:

- 1 In the Portlet Applications list, select the portlet definition for which you want to create a portlet registration.

A General panel displays on the right:



All existing registrations of the selected portlet are listed in the Portlet Applications tree (on the left), under the corresponding portlet definition name.

- 2 In the *Register New Portlet Instance* text box, specify a unique name for the portlet registration, then click *Register*.

The new portlet registration is created and listed in the Portlet Applications tree.

- 3 If you want to modify the preferences and settings of the new portlet registration, see [Section 7.3, “Administering Registered Portlets,” on page 177](#).

## 7.2.3 Viewing Information About Portlet Definitions

You can view the following read-only information about a listed portlet definition:

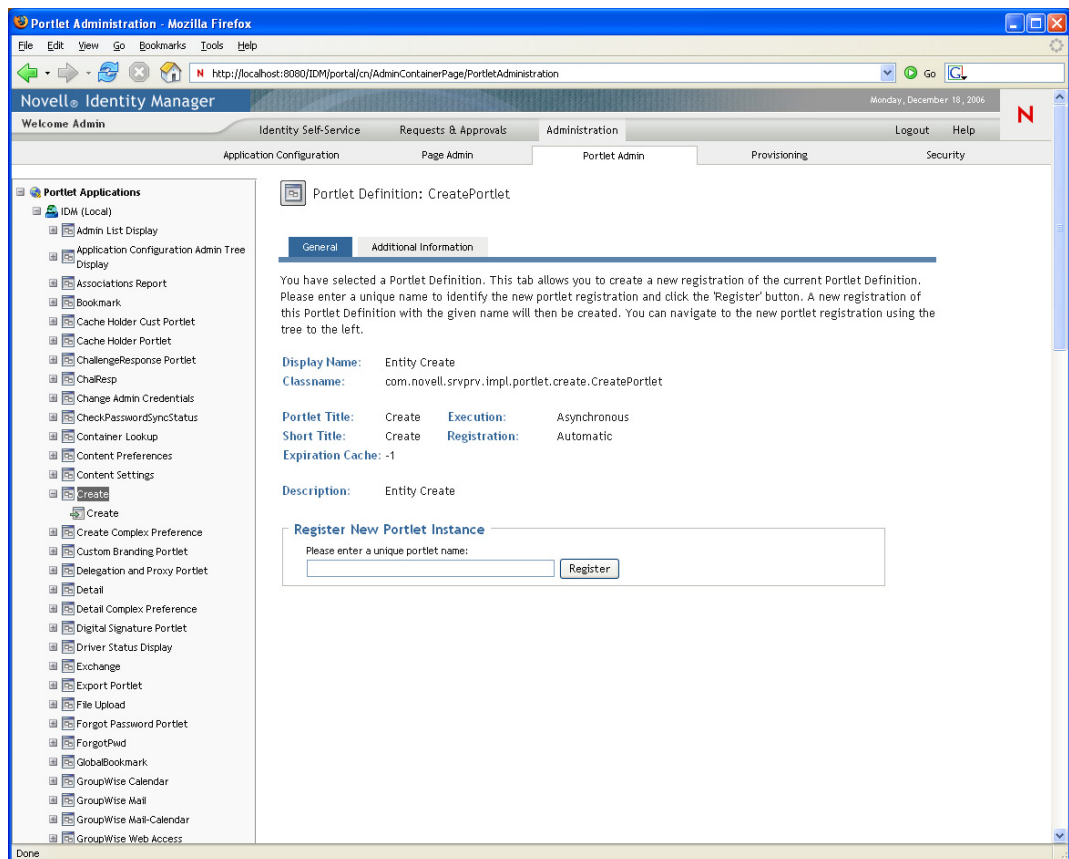
- ◆ Display name
- ◆ Class name
- ◆ Portlet title
- ◆ Type of execution (synchronous or asynchronous)
- ◆ Short title

- ◆ Type of registration
- ◆ Style name
- ◆ Cache expiration time
- ◆ Description
- ◆ Initialization parameters
- ◆ Keywords
- ◆ Supported mime types
- ◆ Modes supported by the portlet
- ◆ Supported locales
- ◆ Supported devices
- ◆ Security roles

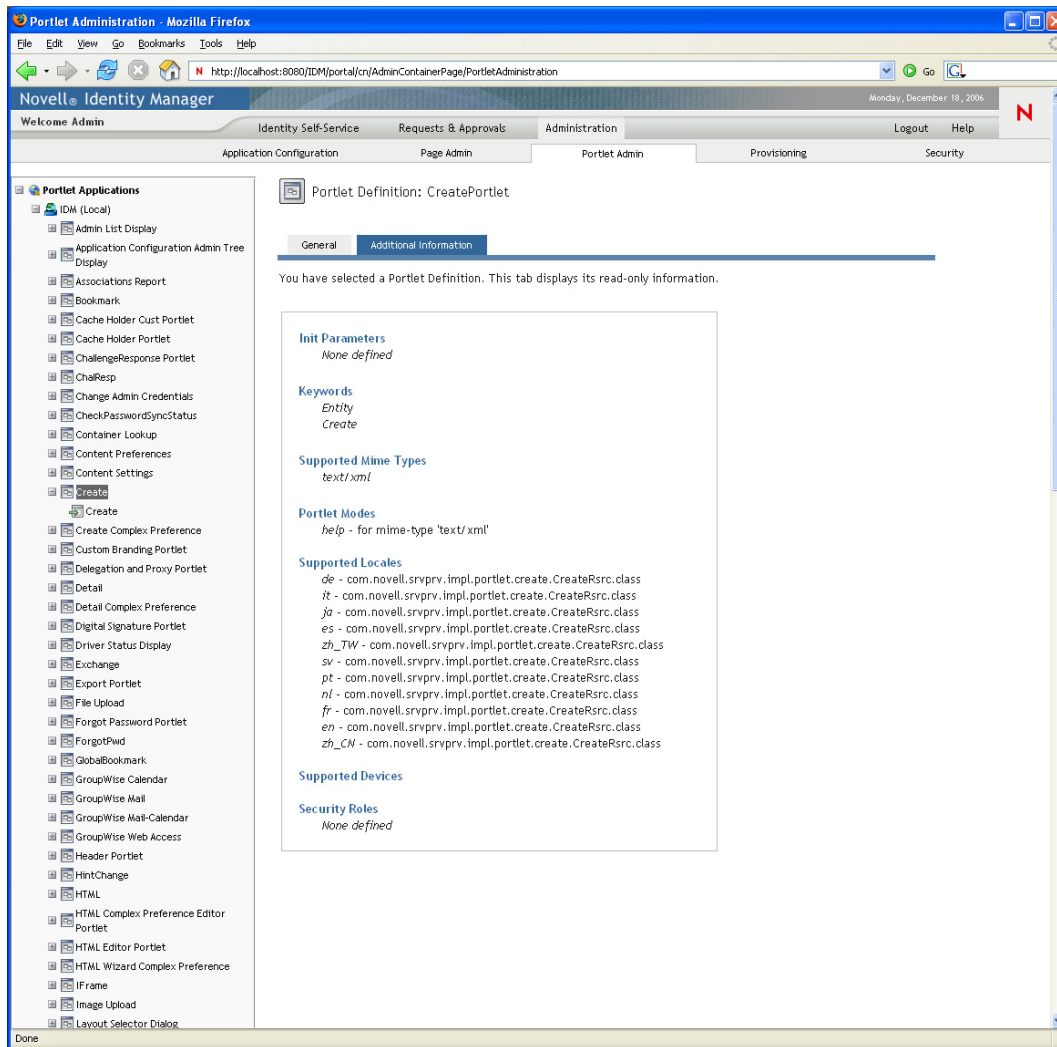
To view information about portlet definitions:

- 1 In the Portlet Applications list, select the portlet definition that you want to learn about.

A General panel displays on the right, showing information about the selected portlet definition:



- 2 Go to the Additional Information panel to view further details about the selected portlet definition:



## 7.3 Administering Registered Portlets

The Portlet Admin page enables you to perform the following tasks related to portlet registrations in a portlet application:

- ◆ Section 7.3.1, “Accessing Portlet Registrations in the Deployed Portlet Application,” on page 178
- ◆ Section 7.3.2, “Viewing Information about Portlet Registrations,” on page 179
- ◆ Section 7.3.3, “Assigning Categories to Portlet Registrations,” on page 180
- ◆ Section 7.3.4, “Modifying Settings for Portlet Registrations,” on page 181
- ◆ Section 7.3.5, “Modifying Preferences for Portlet Registrations,” on page 183
- ◆ Section 7.3.6, “Assigning Security Permissions for Portlet Registrations,” on page 184
- ◆ Section 7.3.7, “Unregistering a Portlet,” on page 186

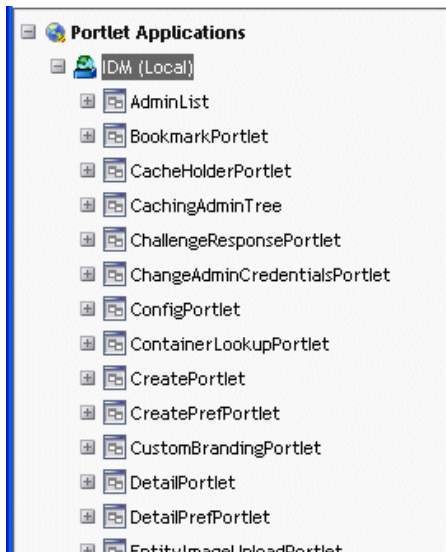
## 7.3.1 Accessing Portlet Registrations in the Deployed Portlet Application

The Portlet Applications list shows the portlet registrations for each portlet definition in a selected portlet application.

**To access portlet registrations in the deployed portlet application:**

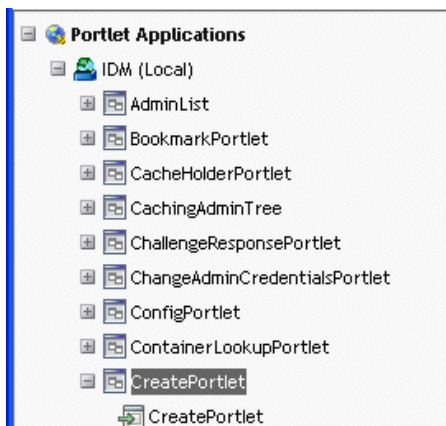
- 1 In the Portlet Applications list, expand the portlet application whose portlet definitions and registrations you want to access.

The tree displays all of the portlet definitions under that portlet application:



- 2 Expand the portlet definition whose portlet registrations you want to access.

The tree displays all of the portlet registrations under that portlet definition:



## 7.3.2 Viewing Information about Portlet Registrations

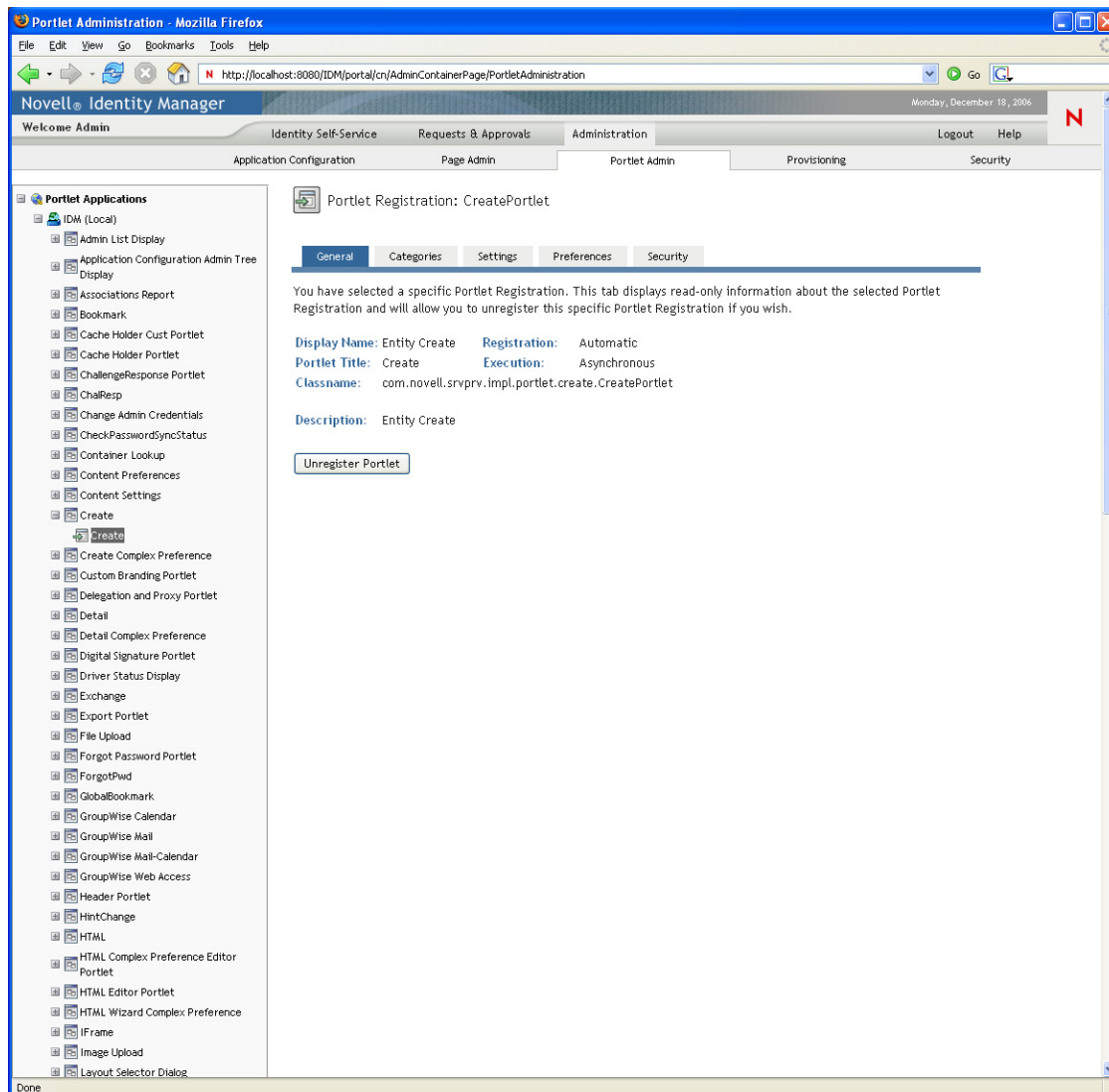
You can view the following read-only information about a listed portlet registration:

- ◆ Display name
- ◆ Type of registration
- ◆ Portlet title
- ◆ Type of execution (synchronous or asynchronous)
- ◆ Class name
- ◆ Description

In the *Portlet Applications* list, select the portlet registration that you want to learn about.

A General panel displays on the right, showing information about the selected portlet registration as shown in [Figure 7-1](#).

**Figure 7-1** Portlet Registration: General Properties



## 7.3.3 Assigning Categories to Portlet Registrations

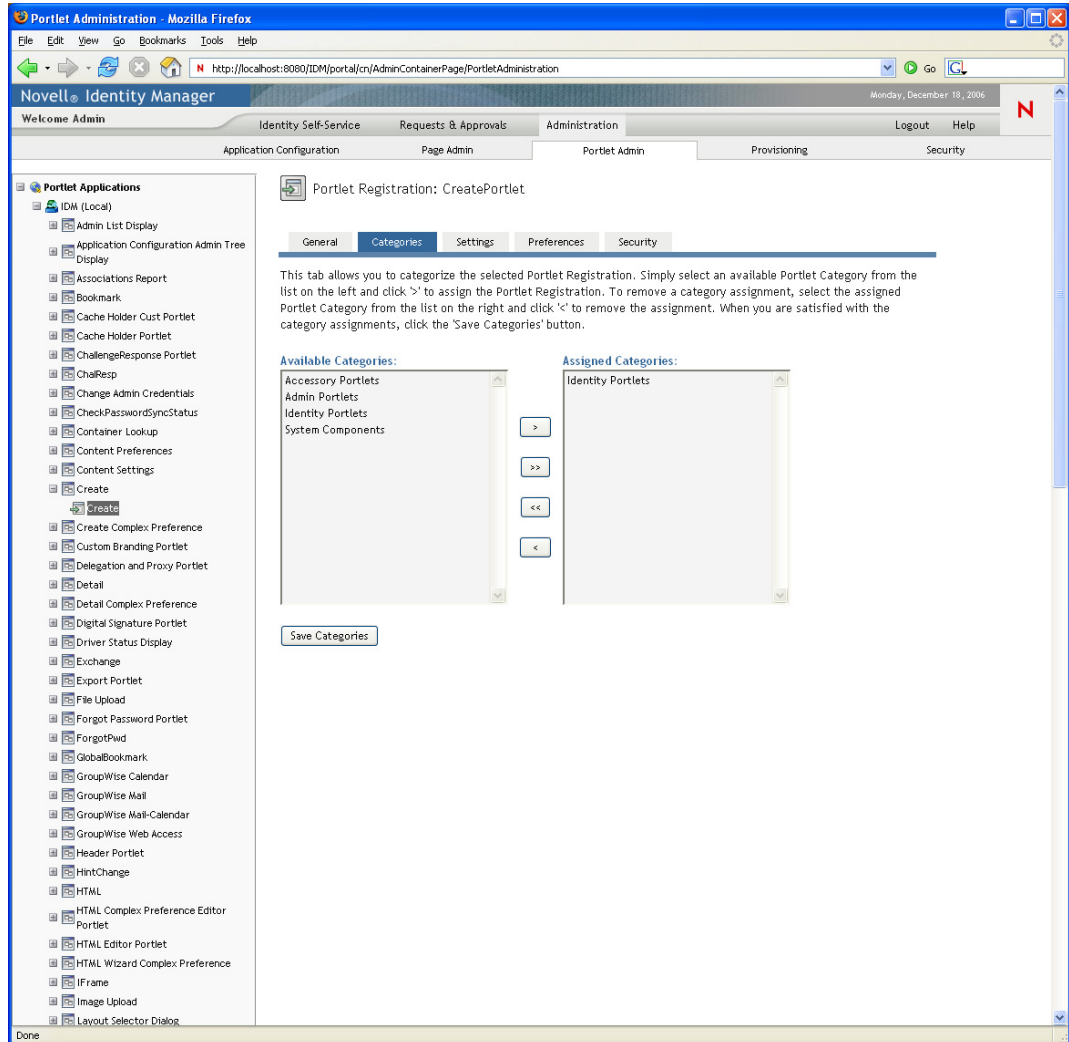
To facilitate searching for specific portlets in a portlet application, you can organize portlet registrations by category.

- 1 In the *Portlet Applications* list, select the portlet registration that you want to categorize.

A General panel displays on the right.

- 2 Go to the Categories panel.

This panel displays lists of available and assigned categories for the selected portlet registration:



- 3 Update the *Assigned Categories* list, as appropriate:

---

If you want to	Do this
----------------	---------

---

Assign one or more categories to the portlet registration

Select each category you want to assign and click >



If you want to	Do this
Assign all categories to the portlet registration	Click >>
Remove one or more category assignments	Select each category you want to remove and click <
Remove all category assignments	Click <<

4 Click *Save Categories*.

## 7.3.4 Modifying Settings for Portlet Registrations

Portlet settings define how the portal (Identity Manager User Application) interacts with individual portlets. Each portlet is configured with these settings:

- ◆ Title
- ◆ Maximum timeout
- ◆ Requires authentication
- ◆ Display title bar
- ◆ Hidden from user
- ◆ Options defined in the portlet application

Standard Java Portlet 1.0 settings are defined in the portlet deployment descriptor (`portlet.xml`) of the portlet application WAR. You can change the values of these settings on a registration-by-registration basis by using the Portlet Admin page. In this case, the new values take effect only for the selected portlet registration.

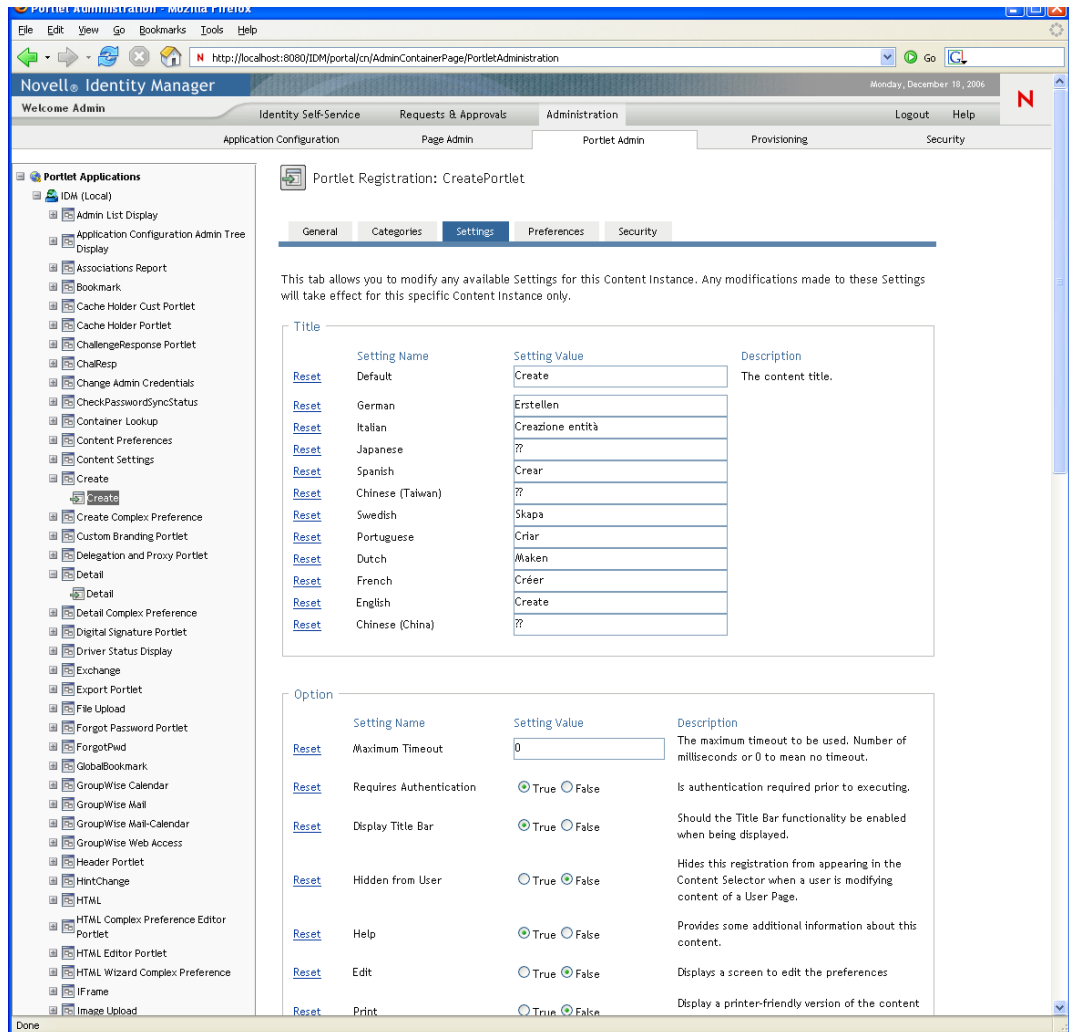
To modify portlet registration settings:

- 1 In the Portlet Applications list, select the portlet registration whose settings you want to modify.

A General panel displays on the right.

- 2 Go to the Settings panel.

This panel displays the current settings for the selected portlet registration:



### 3 Modify settings, as appropriate.

While working on this panel, you can also perform the following actions:

#### If you want to

#### Do this

Discard your unsaved changes

Click *Cancel*

Return all settings for this portlet registration to their default values (as defined in the corresponding portlet definition)

Click *Reset All*

Return an individual setting to its default value

Click the *Reset* link beside that setting

### 4 Click *Save Settings*.

## 7.3.5 Modifying Preferences for Portlet Registrations

Portlet preferences are defined by the portlet developer at design time in the portlet deployment descriptor. Preferences vary from portlet to portlet, based on the portlet developer's implementation.

You can change the values of these preferences on a registration-by-registration basis by using the Portlet Admin page. In this case, the new values take effect only for the selected portlet registration.

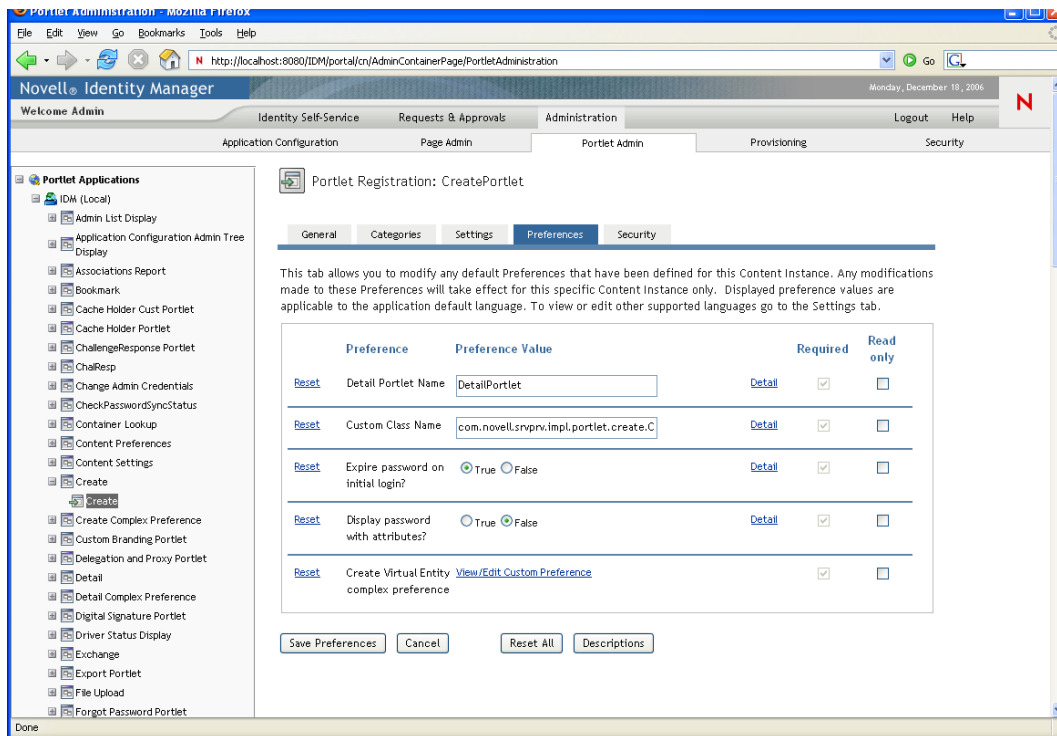
To modify portlet registration preferences:

- 1 In the *Portlet Applications* list, select the portlet registration whose preferences you want to modify.

A General panel displays on the right.

- 2 Go to the Preferences panel.

This panel displays the current preferences for the selected portlet registration:



- 3 Modify preferences, as appropriate.

While working on this panel, you can also perform the following actions:

---

**If you want to****Do this**

Display more information about the preferences

Click *Descriptions*

Discard your unsaved changes

Click *Cancel*

Return all preferences for this portlet registration to their default values (as defined in the corresponding portlet definition)

Click *Reset All*

If you want to	Do this
Return an individual preference to its default value	Click the <i>Reset</i> link next to that preference

- 4 To modify the localized version of a preference for each locale specified in the portlet definition:
  - 4a Click the *Detail* link beside that preference (if available).  
The panel displays the preference values for each locale.
  - 4b Modify values, as appropriate.
  - 4c Click *OK* to apply your changes and return to the main preferences list.
- 5 Click *Save Preferences*.

### 7.3.6 Assigning Security Permissions for Portlet Registrations

You can assign the security permissions described in [Table 7-2](#) to users, groups, and containers for portlet registrations.

**Table 7-2** *Security Permissions for Portlet Registrations*

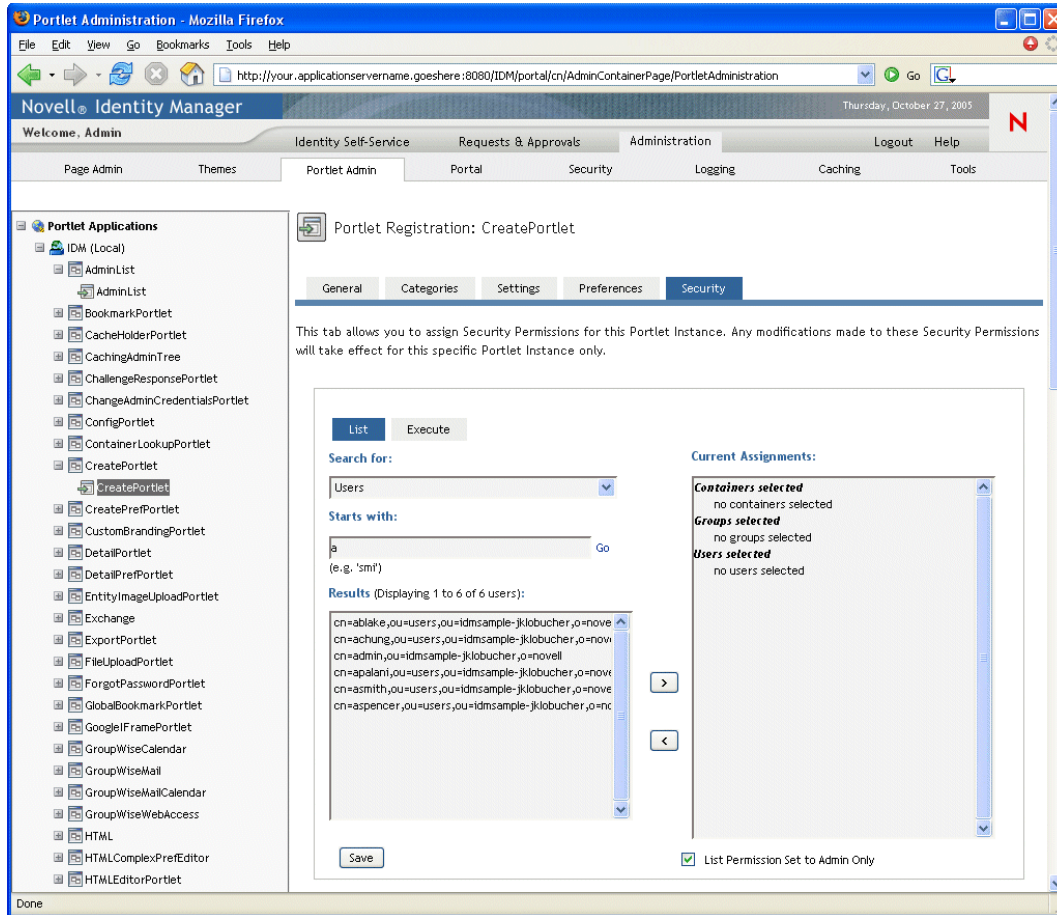
Permission	Description
List	Users can <b>view</b> the portlet registration from a selection list
Execute	Users can <b>run</b> the portlet registration on a portal page

When you modify security permissions, the new values take effect only for the selected portlet registration.

To assign security permissions for portlet registrations:

- 1 In the *Portlet Applications* list, select the portlet registration whose security permissions you want to modify.  
A General panel displays on the right.
- 2 Go to the Security panel.

This panel displays the current security permissions for the selected portlet registration:



- 3 Go to the *List* or *Execute* tab, depending on which type of permission you want to assign.
- 4 Specify values for the following search settings:

Setting	What to do
Search for	Select one of the following from the drop-down menu: <ul style="list-style-type: none"> <li>◆ Users</li> <li>◆ Groups</li> <li>◆ Containers</li> </ul>

Setting	What to do
Starts with	<p>If you want to:</p> <ul style="list-style-type: none"> <li>◆ Find all available objects of your specified type (user, group, or container), then make this setting blank.</li> <li>◆ Find a subset of those objects, then enter the starting characters of the CN values you want. (Case is not considered. Wildcards are not supported.)</li> </ul> <p>For example, searching for groups that start with <code>s</code> would narrow your search results to something like this:</p> <pre>cn=Sales,ou=groups,o=MyOrg cn=Service,ou=groups,o=MyOrg cn=Shipping,ou=groups,o=MyOrg</pre> <p>Searching for groups that start with <code>se</code> would return:</p> <pre>cn=Service,ou=groups,o=MyOrg</pre>

**5** Click *Go*.

The results of your search appear in the Results list.

**6** Select the users, groups, or containers you want to assign to the portlet registration, then click the *Add (>)* button.

Hold down the Ctrl key to make multiple selections.

**7** Enable or disable lock-down for the portlet registration as follows:

If you want to	Do this
Lock down the portlet registration so only User Application Administrators can list/execute it	Select List/Execute Permission Set to Admin Only
Allow all assigned users, groups, and containers to list/execute the portlet registration	Deselect List/Execute Permission Set to Admin Only

**NOTE:** If you deselect this setting but there are no users, groups, or containers explicitly assigned to the portlet registration, then everyone has List/Execute permission for this portlet registration.

**8** Click *Save*.

### 7.3.7 Unregistering a Portlet

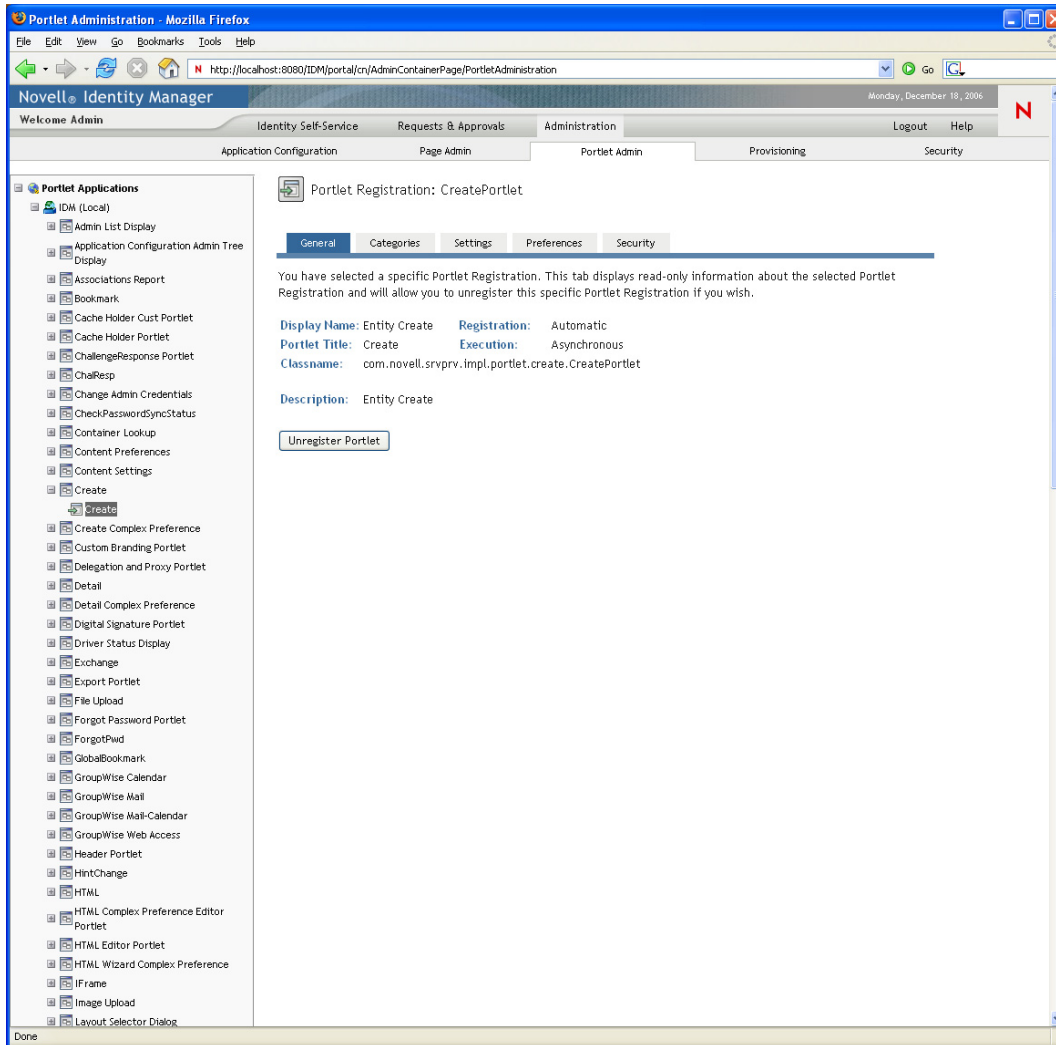
You can use the Portlet Admin page to unregister a portlet if necessary.

**NOTE:** If you unregister a portlet that is defined as auto-registered, that portlet is registered again automatically when you restart your application server.

To unregister a portlet:

**1** In the Portlet Applications list, select the portlet registration that you want to unregister.

A General panel displays on the right, showing information about the selected portlet registration:



- 2 Click *Unregister Portlet*.
- 3 When you are prompted to confirm the unregister operation, click *OK*.





# Provisioning Configuration

This section describes the tasks that you can perform from the Provisioning Configuration page. Topics include:

- ♦ [Section 8.1, “About Provisioning Configuration,” on page 189](#)
- ♦ [Section 8.2, “Configuring Delegation, Proxy, and Task Settings,” on page 189](#)
- ♦ [Section 8.3, “Configuring the Digital Signature Service,” on page 194](#)
- ♦ [Section 8.4, “Configuring the Workflow Engine and Cluster Settings,” on page 197](#)

## 8.1 About Provisioning Configuration

This section provides instructions for using the Provisioning page to administer the workflow-based provisioning features of the User Application. To access the Provisioning page, you need to have the Provisioning Module for Identity Manager. In addition, you need to log on as a Provisioning Application Administrator.

## 8.2 Configuring Delegation, Proxy, and Task Settings

This section includes information about:

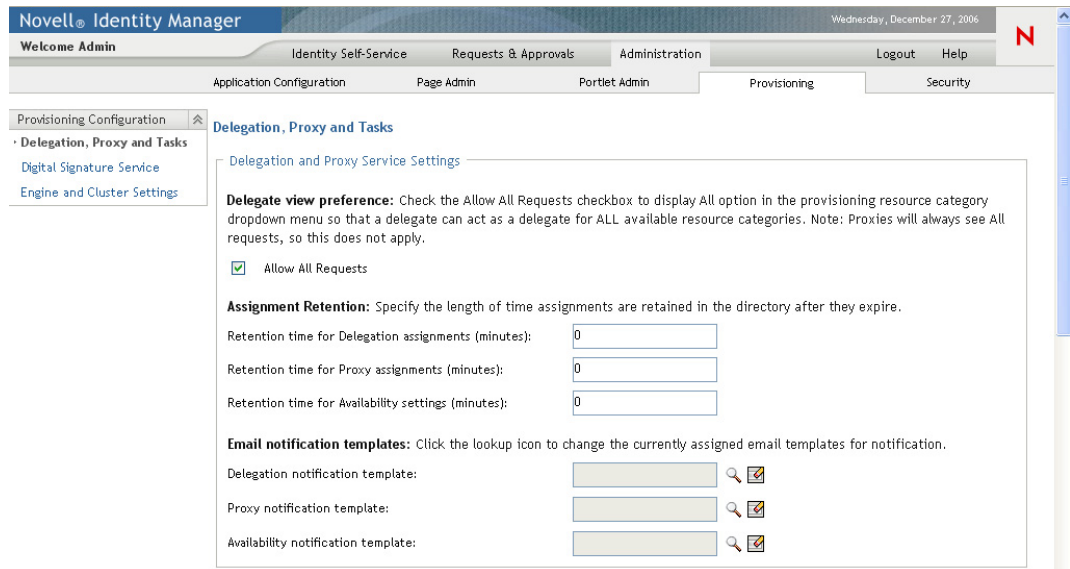
- ♦ [Section 8.2.1, “Configuring the Delegation and Proxy Service,” on page 189](#)
- ♦ [Section 8.2.2, “Scheduling Synchronization and Cleanup,” on page 191](#)
- ♦ [Section 8.2.3, “Configuring Provisioning Interface Display Settings,” on page 192](#)

### 8.2.1 Configuring the Delegation and Proxy Service

To configure the Delegation and Proxy Service:

- 1 Select the *Provisioning* tab.
- 2 Select *Delegation, Proxy and Tasks* from the left navigation menu.

The user interface displays the Delegation, Proxy and Tasks page. To configure the service, you need to make some changes in the Delegation and Proxy Service Settings box.



- 3 Check the *Allow All Requests* option if you want to display the *All* option in the Resource Search Criteria drop-down list for the Team Delegate Assignments action. When the *All* option is available, a delegate assignment can be defined that applies to all resource categories.
- 4 Define the retention period for delegate, proxy, and availability assignments:

Field	Description
<i>Retention time for Delegation assignments</i>	Specifies the number of minutes to retain delegate assignments in the directory after they have expired. The default is 0, which indicates that the assignments will be removed after the expiration time has been reached.
<i>Retention time for Proxy assignments</i>	Specifies the number of minutes to retain proxy assignments in the directory after they have expired. The default is 0, which indicates that the assignments will be removed after the expiration time has been reached.
<i>Retention time for Availability settings</i>	Specifies the number of minutes to retain availability settings in the directory after they have expired. The default is 0, which indicates that the assignments will be removed after the expiration time has been reached.

- 5 Select the e-mail templates you want to use for delegation, proxy, and availability notifications:

Field	Description
<i>Delegation notification template</i>	<p>Specifies the language-independent name for the template to use for delegation e-mail notifications. After the template name has been specified, the notification engine can determine which language-specific template to use at runtime.</p> <p>For details on creating and editing e-mail templates, see <a href="#">Section 18.4, “Working with E-Mail Templates,”</a> on page 338.</p>
<i>Proxy notification template</i>	<p>Specifies the language-independent name for the template to use for proxy e-mail notifications. After the template name has been specified, the notification engine can determine which language-specific template to use at runtime.</p> <p>For details on creating and editing e-mail templates, see <a href="#">Section 18.4, “Working with E-Mail Templates,”</a> on page 338.</p>
<i>Availability notification template</i>	<p>Specifies the language-independent name for the template to use for availability e-mail notifications. After the template name has been specified, the notification engine can determine which language-specific template to use at runtime.</p> <p>For details on creating and editing e-mail templates, see <a href="#">Section 18.4, “Working with E-Mail Templates,”</a> on page 338.</p>

## 8.2.2 Scheduling Synchronization and Cleanup

To configure the Synchronization and Cleanup Service:

- 1 Select the *Provisioning* tab.
- 2 Select *Delegation, Proxy and Tasks* from the left navigation menu.

The user interface displays the Delegation, Proxy and Tasks page. To schedule synchronization and cleanup, you need to make some changes in the Synchronization and Cleanup Service box.

**Synchronization and Cleanup Service**

Set synchronization time for delegation, proxy and availability settings. Activation interval change will take effect the next time application starts up.

Synchronization Service Activation Interval (minutes):

Set cleanup service to delete assignments and settings that have passed retention time, using one of the following methods. Activation interval change will take effect the next time application starts up.

Cleanup Service Activation Interval (minutes):

Cleanup Date:

Last cleanup performed:

- 3 To specify how often you want to activate the synchronization service, type the activation interval (in minutes) in the *Synchronization Service Activation Interval* field. The default value is 0, which means that the service is not activated.

When the synchronization service runs, any modifications (or deletions) made to delegate assignments are synchronized with the corresponding availability settings for the user.

- 4 To specify how often you want to activate the cleanup service, select *Cleanup Service Activation Interval*, then type the activation interval (in minutes). Alternatively, select *Cleanup Date* and use the calendar tool to specify the date when you want to activate the service. The default value is 0, which means that the service is not activated.

When the cleanup service runs, all obsolete proxy and delegate assignments are removed from the system.

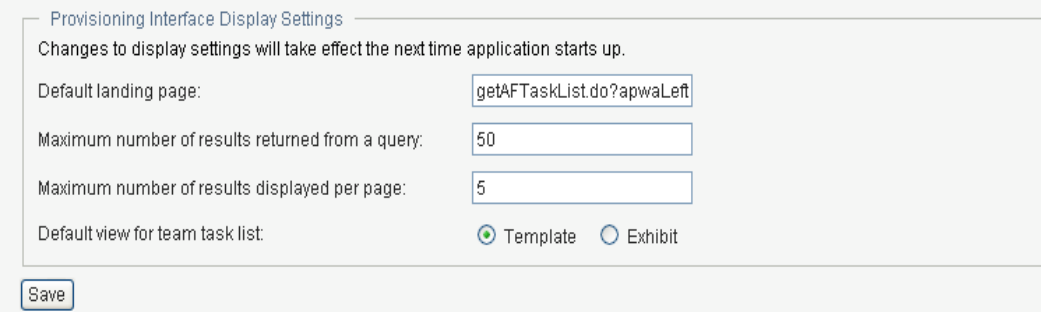
If the cleanup service has been activated, the *Last cleanup performed* field indicates when the last cleanup was performed.

## 8.2.3 Configuring Provisioning Interface Display Settings

To configure the Provisioning Interface display settings:

- 1 Select the *Provisioning* tab.
- 2 Select *Delegation, Proxy and Tasks* from the left navigation menu.

The user interface displays the Delegation, Proxy and Tasks page. To schedule synchronization and cleanup, you need to make some changes in the Provisioning Interface Display Settings box.



The screenshot shows a configuration window titled "Provisioning Interface Display Settings". It contains a message: "Changes to display settings will take effect the next time application starts up." Below this are four settings:

- Default landing page:
- Maximum number of results returned from a query:
- Maximum number of results displayed per page:
- Default view for team task list:  Template  Exhibit

A "Save" button is located at the bottom left of the configuration box.

- 3 To change the default landing page, type the URL for another page in the *Default Landing Page* field. The default page is shown below:

```
getAFTaskList.do?apwaLeftNavItem=JSP_MENU_TASKS&apwaActionType=user
```

The page you specify must be reference a servlet that is available from the *Requests & Approvals* tab. To change the landing page, you can click on the desired page in the left-hand navigation panel on the *Requests & Approval*, and then cut and paste the last part of the URL after the application context (IDMProv) into the *Default Landing Page* field. For example, to set the landing page to My Requests, you could paste the following string into the field:

```
getAFProcessList.do?apwaLeftNavItem=JSP_MENU_REQUESTS&apwaActionScope=user&apwaNewSearch=true
```

- 4 To set the number of rows returned from each query, type the row limit in the *Maximum number of results returned from a query* box. The default is 50.

- 5 To set the number of rows displayed on each page, type the display limit in the *Maximum number of results displayed per page* box. The default is 5.

The *Maximum number of results displayed per page* values affect the display on several screens on the *Requests & Approvals* tab, including My Tasks, My Requests, My Proxy Assignments, and My Delegate Assignments.

- 6 To set the view for the Team Tasks list, click either the *Template* or the *Exhibit* radio button.

Review [Table 8-1](#) to decide which view of tasks to select for your users. [Figure 8-1](#) and [Figure 8-2](#) show the displays.

**Table 8-1** Comparison of Template View of Team Tasks and Exhibit View of Team Tasks

Feature	Template View	Exhibit View
Is the view tabular?	Yes	Yes
Does the view offer Section 508 Accessibility?	Yes	No
Is this the default template?	Yes	No
How many tasks can I list in a search?	Thousands, or more.	A few hundred or more. Speedy performance at a few hundred items.
Filter	You can filter the search with one or both of these filters on the Team Tasks page: Recipient, or Assigned To.	You can filter the search with one or both of these filters on the Team Tasks page: Recipient, or Assigned To.  Also, you can filter retrieved data without having to conduct a new search: select one or more filter parameters in filter boxes at the right of the Exhibit display.
Sort by column value	Yes. Click a column header to toggle an Ascending or Descending sort of the column.	Yes. Click a column header to toggle an Ascending or Descending sort of the column.
Sort column order	The order in which you select column headers on the Team Tasks page is the order in which the columns display.	The order in which you select column headers on the Team Tasks page is the order in which the columns display.
Page length	On the Team Tasks page, set page length to 5, 10, or 15 entries before you search.	You cannot set page length, but you can: <ul style="list-style-type: none"> <li>◆ Use filters to select a subset of tasks to display.</li> <li>◆ Copy the list to your clipboard and create an editable .txt or .html report file.</li> </ul>

Figure 8-1 Example of Template Display

# of tasks per page

Task	Request	Recipient	Type	Assigned To	Claimed	Timeout
Single Approval	Grant Medical Insurance	Kevin Chester		Margo MacKenzie		1 Days 23 Hours 39 Minut
Single Approval	Grant Expense System Access	Margo MacKenzie		Timothy Swan		1 Days 23 Hours 43 Minut
Single Approval	Enable Active Directory Account (Mgr Approve-No Timeout)	Kevin Chester		Margo MacKenzie		1 Days 23 Hours 35 Minut
Single Approval	Enable Active Directory Account (Mgr Approve-No Timeout)	Margo MacKenzie		Timothy Swan		1 Days 23 Hours 42 Minut
Single Approval	Enable Active Directory Account (Mgr Approve-No Timeout)	Allison Blake		Margo MacKenzie		1 Days 23 Hours 40 Minut
Single Approval	Grant SmartCard	Margo MacKenzie		Timothy Swan		1 Days 23 Hours 44 Minut
Single Approval	Grant Gym	Kevin Chester		Margo MacKenzie		1 Days 23 Hours 39 Minut
Single Approval	Grant Books7X24	Kevin Chester		Margo MacKenzie		1 Days 23 Hours 36 Minut
Single Approval	Grant Dental Insurance	Kevin Chester		Margo MacKenzie		1 Days 23 Hours 37 Minut
Single Approval	Grant Medical Insurance	Allison Blake		Margo MacKenzie		1 Days 23 Hours 41 Minut

1 - 10 of 16

Figure 8-2 Example of Exhibit Display

**Team Tasks**

16 Tasks total Copy List to Clipboard

Task	Request	Recipient	Type	Assigned To	Claimed	Timeout	Priority	Request Date	Requested By	Digital Signature
Single Approval	Grant Medical Insurance	Kevin Chester		Margo MacKenzie		1 Days 23 Hours 36 Minutes		0 Days 0 Hours 23 Minutes ago	Kevin Chester	<div style="border: 1px solid #ccc; padding: 5px;"> <p>16 ✓ Single Approval</p> <hr/> <p><b>Request</b></p> <p>4 ✓ Enable Active Directory Account (Mgr Approve-No Timeout)</p> </div>
Single Approval	Grant Expense System Access	Margo MacKenzie		Timothy Swan		1 Days 23 Hours 40 Minutes		0 Days 0 Hours 19 Minutes ago	Margo MacKenzie	<div style="border: 1px solid #ccc; padding: 5px;"> <p>12 ✓ Margo MacKenzie</p> <p>4 ✓ Timothy Swan</p> </div>
Single Approval	Enable Active Directory Account (Mgr Approve-No Timeout)	Kevin Chester		Margo MacKenzie		1 Days 23 Hours 32 Minutes		0 Days 0 Hours 27 Minutes ago	Kevin Chester	
Single Approval	Enable Active Directory Account (Mgr Approve-No Timeout)	Margo MacKenzie		Timothy Swan		1 Days 23 Hours 39 Minutes		0 Days 0 Hours 20 Minutes ago	Margo MacKenzie	

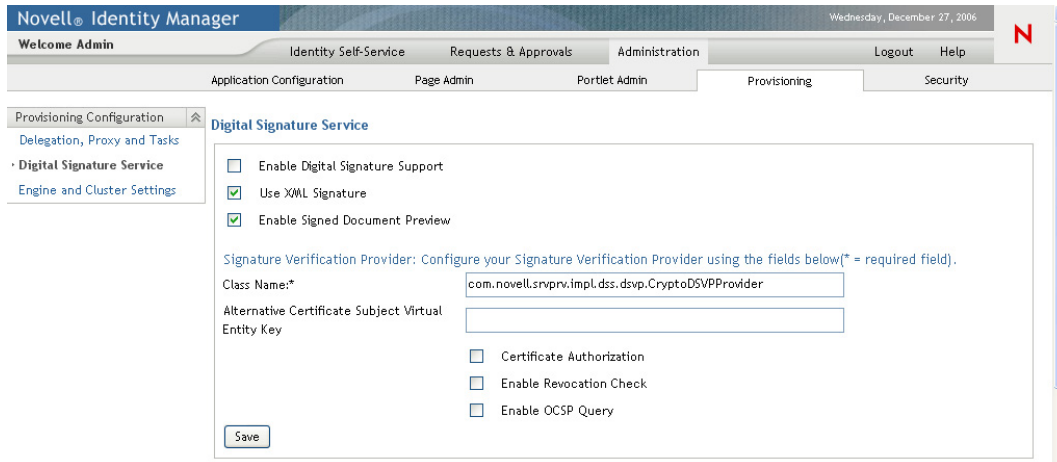
## 8.3 Configuring the Digital Signature Service

This section provides details on configuring the Digital Signature Service.

To configure the Digital Signature Service:

- 1 Select the *Provisioning* tab.
- 2 Select *Digital Signature Service* from the left navigation menu.

The user interface displays the Digital Signature Service panel:



**3** Perform these steps to configure the Digital Signature Service:

**3a** Select the *Enable Digital Signature Support* check box.

If this check box is not selected, users will see an error message when they try to access any provisioning resource that requires a digital signature.

Before enabling digital signature support, make sure all of the required JARs are present. If any of the JARs are missing, you will see an error message when you select the check box. For details on which JARs are required for digital signatures, see [Section 2.3, “Digital Signature Configuration,” on page 43](#).

**3b** Select the *Use XML Signature* check box if you want to use an XML Signature. (This option is required if you are using cryptovision.)

**3c** Optionally select the *Enable Signed Document Preview* to allow users to preview signed documents.

**3d** Type the name of the class for your digital signature service in the *Class Name* field.

For details on using cryptovision as your signature verification provider, see <http://www.cryptovision.com/idmdigsig.html>.

**3e** Optionally specify an entity key in the *Alternative Certificate Subject Virtual Entity Key* field. The entity key maps to an entity defined in the data abstraction layer. The entity provides a calculated attribute that can be used instead of the LDAP common name to ensure that only authorized users can perform digital signing. In the Designer, you define the entity, giving the key any name you like. On the Digital Signature Service configuration panel, you specify the key for the entity you defined. The alternative subject is an optional feature that you can use to add an extra layer of protection.

**3f** Optionally select the *Certificate Authorization* check box to ensure that the authenticated user matches the user associated with the selected user certificate. When *Certificate Authorization* is enabled, the current user is not permitted to use a certificate on the smart card (or browser) that has been given to a different user.

**3g** Optionally select the *Enable Revocation Check* check box to cause the application to check the certificate revocation list (CRL) before using a certificate to be sure that it is still valid. A certificate might be revoked for several reasons. For example, the certificate authority might determine that a particular certificate was improperly issued.

Alternatively, the certificate might be revoked if the private key for the certificate has been lost or stolen.

- 3h** Optionally select the *Enable OCSP Query* check box to perform a query against an Online Certificate Status Protocol (OCSP) server before using a certificate. OCSP is an alternative to certificate revocation lists that addresses problems associated with using CRLs in a public key infrastructure (PKI). The OCSP access point for the server is specified in the User Application Configuration utility.
- 4** To view the settings for a previously configured applet, select the applet from the *Signature Applet* dropdown list.

**Signature Applet**

Use the dropdown menu below to view each digital signature applet settings that are currently configured. Click the Add or Remove button to add a new applet or remove the currently selected applet.

Signature Applet: IE Cryptovision Applet

Class ID: 0805F499D93

Archive Name: SAFXIE.jar

Context Root: /xmlsigner

Callback Name: myCallback

Declaration Template: <object id="signer\_id" classid="\$classid" height=16 width=16> <param name="code" value="com/cryptovision/safx/SAFXIE.class"/> <param name="archive" value="\$root/\$archive"/> <param name="mayscript" value="true"/> </object>

Invocation Template: document.signer\_id.applet\_sign(\$input,\$callback)

Callback Function Template: \$callback=function(res){ \$storeresult(res) ;}

Browsers: IE\_6\_0\_WIN

Add Remove

For details on configuring the cryptovision applet, see <http://www.cryptovision.com/idmdigsig.html>.

- 5** Perform these steps to add a new signature applet configuration:
  - 5a** Click *Add*.
  - The user interface makes the fields in the Signature Applet panel editable.
  - 5b** Provide a name for this applet configuration in the *Display Name* field.
  - 5c** Specify the class ID for the applet in the *Class ID* field.
  - 5d** Specify the entry of the JAR that contains the applet in the *Archive Name* field.
  - 5e** Specify <context root path> of the Web application that contains the applet archive for the *Context Root*. (If the context root points to a different application, always start it with a “/” character.)
  - 5f** Specify the callback name in the *Callback Name* field.
  - 5g** Specify the XML declaration string in the *Declaration Template* field.
  - 5h** Specify the invocation string in the *Invocation Template* field.
  - 5i** Specify the callback function in the *Callback Function Template* field.
  - 5j** Select the browser type (for example, IE 6.0) in the *Browser Type* select list.
- 6** Click *Save* to save your settings.



## 8.4 Configuring the Workflow Engine and Cluster Settings

This section provides instructions on configuring the Workflow Engine and on configuring cluster settings. These settings apply to all engines in the cluster. When any of these settings are changed, other engines in the cluster will detect these changes in the database and use the new values. The engines check for changes to these settings at the same rate as specified by the pending process interval.

The process cache settings and heartbeat settings require a server restart to take effect.

### 8.4.1 Configuring the Workflow Engine

To configure the Workflow Engine settings:

- 1 Select the *Provisioning* tab.
- 2 Select *Engine and Cluster Settings* from the left navigation menu.

The user interface displays the Workflow Configuration Settings page. To configure the engine, you need to make some changes in the Workflow Engine box.

Workflow Engine

Modify any of the settings below to change the current workflow engine configuration. All fields are required.

Email Notification (per workflow engine):	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
Web Service Activity Timeout (minute):	<input type="text" value="50"/> (valid range: 1 minute to 7 days)
User Activity Timeout (hour, 0 for no timeout):	<input type="text" value="0"/> (valid range: 0 hour to 365 days)
Completed Process Timeout (day):	<input type="text" value="120"/> (valid range: 0 day to 365 days)
Completed Process Cleanup Interval (hour):	<input type="text" value="12"/>
Pending Process Interval (second):	<input type="text" value="30"/>
Retry Queue Interval (minute):	<input type="text" value="15"/>
Maximum Thread Pool Size:	<input type="text" value="20"/>
Minimum Thread Pool Size:	<input type="text" value="10"/>
Initial Thread Pool Size:	<input type="text" value="5"/>
Thread Keep Alive Time (second):	<input type="text" value="300"/>
Process Cache Load Factor:	<input type="text" value="0.75"/> (valid range: 0 to 1)
Process Cache Initial Capacity:	<input type="text" value="700"/>
Process Cache Maximum Capacity:	<input type="text" value="500"/>
Maximum Engine Shutdown Timeout (minute):	<input type="text" value="1"/>

- 3 To change an engine setting, click the target field for the setting and type the new value. The engine settings are described below:

<b>Engine Setting</b>	<b>Description</b>
<i>Email Notification (per workflow engine)</i>	Enables or disables e-mail notifications for the entire workflow engine. Defaults to enabled.
<i>Web Service Activity Timeout (minute)</i>	Specifies the default Web Service activity timeout in minutes. The default is 50 minutes.
<i>User Activity Timeout (hour, 0 for no timeout)</i>	Specifies the default user activity timeout. The default is 0 days, which indicates no timeout.
<i>Completed Process Timeout (day)</i>	Specifies the number of days that a completed process state is kept in the system. The default is 120 days.
<i>Completed Process Cleanup Interval (hour)</i>	Specifies how often the engine checks for and removes completed processes that have been in the system for longer than the completed process timeout. The default is 12 hours.
<i>Pending Process Interval (second)</i>	User activities that are executed on an engine which the process is not bound to are put into a pending state. This interval specifies how often to check for pending activities in order to continue their execution. The default is 30 seconds.
<i>Retry Queue Interval (minute)</i>	Activities that fail because of suspected database connectivity issues are put on a retry queue. This interval specifies how often the engine attempts to retry these activities. The default is 15 minutes.
<i>Maximum Thread Pool Size</i>	The maximum number of threads that the engine uses to execute activities. The default is 20.
<i>Minimum Thread Pool Size</i>	The minimum number of threads that the engine uses to execute activities. When a thread is requested and fewer than the minimum are in the pool, a new thread will be created even if there are idle threads in the pool. The default is 10.
<i>Initial Thread Pool Size</i>	Number of prestarted threads in the pool when it is created. The default is 5.
<i>Thread Keep Alive Time (second)</i>	If the pool is larger than the minimum size, excess threads that have been idle for more than the keep alive time will be destroyed. The default is 5 minutes.
<i>Process Cache Load Factor</i>	The load factor specifies how full the cache is allowed to get before increasing its capacity. If the number of entries in the cache exceeds the product of the load factor multiplied by the current capacity, then the capacity is increased. The default is 0.75.
<i>Process Cache Initial Capacity</i>	The process cache is backed by a hash map. The capacity is the number of buckets in the hash map. The initial capacity is the number of buckets at the time the cache is created. The default is 700.

Engine Setting	Description
<i>Process Cache Maximum Capacity</i>	<p>Before adding a process to the cache, if the number of processes in the cache equals or exceeds the Process Cache Maximum Capacity, the cache attempts to remove the oldest inactive process from the cache. The maximum capacity is a soft limit, so the number of processes in the cache might exceed the Process Cache Maximum Capacity if there are no inactive processes (only active processes) in the cache.</p> <p>A good value for this setting should be less than product of the Process Cache Initial Capacity and the Process Cache Load Factor. This gives the cache a chance to remove older inactive processes from the cache before having to increase its capacity.</p> <p>Take the following example:</p> <p>Process Cache Initial Capacity = 700;</p> <p>Process Cache Load Factor = .75;</p> <p>Process Cache Maximum Capacity = 500;</p> <p>Number of processes in cache = 500;</p> <p>In this case, the number of processes in the cache that will trigger the cache to grow its capacity and perform a rehash would be 525, because the Initial capacity multiplied by the load factor is equal to 525.</p> <p>In this example, when there are 500 processes in the cache, the cache is approaching the point where it must increase its size and perform a rehash, which is at 525 processes. When another process is added to the cache, the engine attempts to remove the least recently used inactive process instead of letting the cache get closer to 525 processes.</p> <p>The default is 500.</p>
<i>Maximum Engine Shutdown Timeout (minute)</i>	<p>The engine attempts to shutdown gracefully. When shutting down it stops queuing new activities for execution and attempts to complete any activities already queued. This timeout specifies the maximum time that the engine waits for all queued activities and threads executing activities to complete. If this time is exceeded, the engine halts processing of queued activities and attempts to stop all threads executing activities. The default is 1 minute.</p>

## 8.4.2 Configuring the Workflow Cluster

To configure the Workflow Cluster settings:

- 1 Select the *Provisioning* tab.
- 2 Select *Engine and Cluster Settings* from the left navigation menu.

The user interface displays the Workflow Configuration Settings page. To configure cluster settings, you need to make some changes in the Workflow Cluster box.

**Workflow Cluster**

Modify any of the settings below to change the current cluster configuration. Review the list of each workflow engine in the cluster for engine ID and engine state. All fields are required.

Heartbeat Interval (second, minimum 60):

Heartbeat Factor (minimum 2):

<a href="#">Engine ID(Read Only)</a>	<a href="#">Engine State(Read Only)</a>
ENGINE	Running

- 3 To change a cluster setting, click the target field for the setting and type the new value. The cluster settings are described below:

Cluster Setting	Description
<i>Heartbeat Interval (second, minimum 60)</i>	<p>Specifies the interval at which the workflow engine’s heartbeat is updated.</p> <p>When the workflow engine starts up, it detects if its engine ID is already being used by another node in the cluster and refuses to start if the ID is in use. The User Application database maintains a list of engine IDs and engine states. If an engine crashes and is restarted, its last state in the database indicates that it is still running. The workflow engine therefore uses a heartbeat timer, which writes heartbeats at the specified interval, to determine if an engine with its ID is still running in the cluster. If it’s already running, it refuses to start.</p> <p>The minimum value for the heartbeat interval is 60 seconds.</p>
<i>Heartbeat Factor (minimum 2)</i>	<p>Specifies the factor that is multiplied with the heartbeat interval to arrive at the heartbeat timeout.</p> <p>The timeout is the maximum elapsed time permitted between heartbeats before an engine will be considered timed out.</p> <p>The minimum value for the heartbeat factor is 2.</p>

# Security Configuration

This section describes how to use the Security page on the *Administration* tab of the Identity Manager User Application. Topics include:

- ♦ [Section 9.1, “About Security Configuration,” on page 201](#)
- ♦ [Section 9.2, “Assigning the User Application Administrator,” on page 203](#)
- ♦ [Section 9.3, “Assigning the Provisioning Administrator,” on page 204](#)

For general information about accessing and working with the *Administration* tab, see [Chapter 4, “Using the Administration Tab,” on page 83](#).

## 9.1 About Security Configuration

The Identity Manager 3.5 User Application assigns administrative tasks to Provisioning Application Administrators and User Application Administrators.

**Table 9-1** *Types of Administrator*

This Role	Can Perform
User Application Administrator	Application administration tasks, in the <i>Administration</i> tab in the User Application.
Provisioning Application Administrator	Provisioning workflow management tasks, in the <i>Requests and Approvals</i> tab in the User Application.

You can assign these roles at installation and on the Security page on the *Administration* tab of the Identity Manager User Application. When you assign these roles at installation, IDM writes the assignments to the User Application configuration file, which is editable with the `configupdate` utility. But, at deployment of the WAR, the assignments are written to the User Application database. Thus, after you start the JBoss Application Server the first time after installation, you cannot change these assignments with the `configupdate` utility--they must be changed from the Security page. 226891

### 9.1.1 The User Application Administrator

The User Application Administrator performs administrative tasks for the Identity Manager User Application, using the *Administration* panel of the Identity Manager User Application. The User Application Administrator does not have provisioning administration rights, and is considered an ordinary user while using the *Requests and Approvals* panel. There can be more than one User Application Administrator.

One user *must* be assigned to the User Application Administrator role at installation. The User Application Administrator created during installation can administer everything in the User Application including the Provisioning system and can designate other users as User Application Administrators or Provisioning Application Administrators.

A user who is to be a User Application Administrator should typically be located under the user root container specified in the User Application's LDAP configuration. This enables the user to log in simply by username (instead of requiring the fully distinguished name each time).

The user who is a User Application Administrator does not need special directory rights because this role controls application-level access.

---

**NOTE:** If necessary, a User Application Administrator can assign permission for one or more end users to see and access specific pages on the *Administration* tab. These permissions are assigned by using the Page Admin page on the *Administration* tab. (For details, see [Chapter 6, "Page Administration," on page 139.](#))

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## 9.1.2 The Provisioning Application Administrator

The Provisioning Application Administrator administers the Provisioning system and not the User Application. The Provisioning Application Administrator has rights and permissions for all functions (is essentially a "superuser") within the *Requests and Approvals* panel.

A Provisioning Application Administrator is assigned at installation. Create at least one Provisioning Application Administrator as soon as possible after installation to keep your system secure. If there is no Provisioning Application Administrator, every logged-in user is treated as a Provisioning Application Administrator. This is not secure.

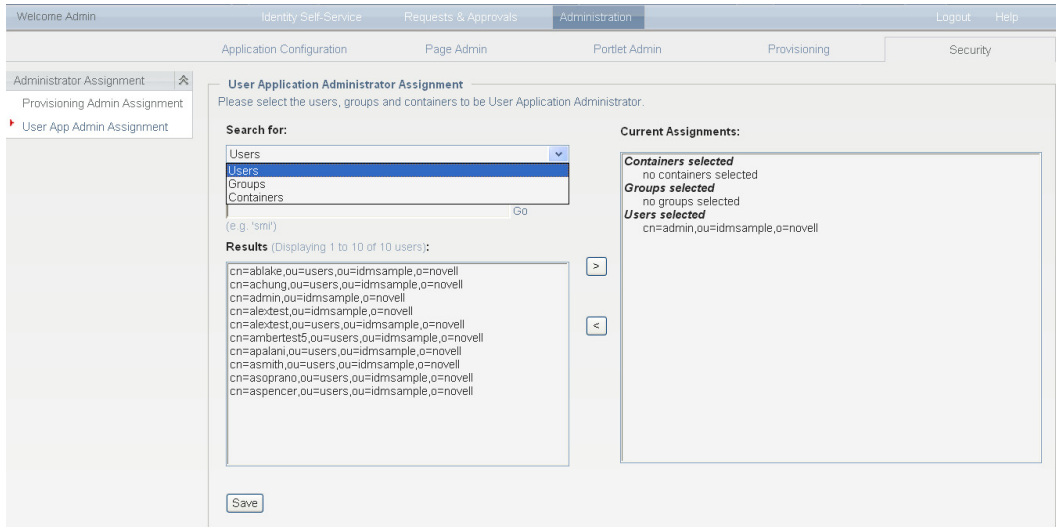
A Provisioning Application Administrator can assign other users to be Provisioning Application Administrators. However, he must be a User Application Administrator in order to get access to the provisioning administrator assignment page in the administration console.

You might prefer to locate a user who is to be a Provisioning Application Administrator under the user root container specified in the User Application's LDAP configuration. This location enables the user to log in simply by username (instead of requiring the fully distinguished name each time).

## 9.2 Assigning the User Application Administrator

When assigning User Application Administrators, you can specify users, groups, or containers.

- 1 Go to the Security page:



- 2 Under *Administrator Assignment*, select *User App Admin Assignment*.
- 3 Specify values for the following search settings:

Setting	What to Do
Search for	Select one of the following from the drop-down menu: <ul style="list-style-type: none"> <li>◆ Users</li> <li>◆ Groups</li> <li>◆ Containers</li> </ul>
Starts with	If you want to: <ul style="list-style-type: none"> <li>◆ Find all available objects of your specified type (user), then make this setting blank.</li> <li>◆ Find a subset of those objects, then enter the starting characters of the CN values you want. (Case is not considered. Wildcards are not supported.)</li> </ul>

- 4 Click *Go*.  
The results of your search appear in the Results list.
- 5 Select the users, group, or container you want to assign as User Application Administrators, then click *Add (>)*.  
Hold down the Ctrl key to make multiple selections.
- 6 Click *Save*.

To unassign User Application Administrators:

- 1 In the Current Assignments list, select the users, group, or container you want to unassign as User Application Administrators, then click *Remove* (<).

Hold down the Control key to make multiple selections.

- 2 Click *Save*.

You cannot delete yourself as User Application Administrator. This is a safeguard to ensure that the User Application always has at least one User Application Administrator.

## 9.3 Assigning the Provisioning Administrator

When assigning Provisioning Administrators, you can specify users, groups, or containers.

- 1 Go to the Security Page.
- 2 Under *Administrator Assignment*, select *Provisioning Admin Assignment*.

- 3 Search for the users, groups, or containers you want to assign. Specify values for the following search settings:

Setting	What to Do
Search for	Select one of the following from the drop-down menu: <ul style="list-style-type: none"> <li>◆ Users</li> <li>◆ Groups</li> <li>◆ Containers</li> </ul>



Setting	What to Do
Starts with	<p>If you want to:</p> <ul style="list-style-type: none"> <li>♦ Find all available objects of your specified type (user, group, or container), then make this setting blank.</li> <li>♦ Find a subset of those objects, then enter the starting characters of the CN values you want. (Case is not considered. Wildcards are not supported.)</li> </ul> <p>For example, searching for groups that start with <code>s</code> would narrow your search results to something like this:</p> <pre>cn=Sales,ou=groups,o=MyOrg cn=Service,ou=groups,o=MyOrg cn=Shipping,ou=groups,o=MyOrg</pre> <p>Searching for groups that start with <code>Se</code> would return:</p> <pre>cn=Service,ou=groups,o=MyOrg</pre>

- 4 Click *Go*. The results of your search appear in the Results list.
- 5 Select the users, groups, or containers you want to assign as Provisioning Administrators, then click *Add* (>).  
Hold down the Ctrl key to make multiple selections.
- 6 Click *Save*.

#### To unassign Provisioning Application Administrators:

- 1 In the Current Assignments list, select the users, groups, or containers you want to unassign as User Application Administrators, then click *Remove* (<).  
Hold down the Control key to make multiple selections.
- 2 Click *Save*.

If you delete Provisioning Application Administrators, keep at least one. One is necessary to protect the security of your system. If you attempt to remove the last Provisioning Application Administrator, you receive an alert.



# Portlet Reference

# IV

These sections describe how to configure the identity and system portlets used in the Identity Manager user interface:

- ♦ [Chapter 10, “About Portlets,” on page 209](#)
- ♦ [Chapter 11, “Create Portlet Reference,” on page 213](#)
- ♦ [Chapter 12, “Detail Portlet Reference,” on page 221](#)
- ♦ [Chapter 14, “Resource Request Portlet,” on page 267](#)
- ♦ [Chapter 13, “Org Chart Portlet Reference,” on page 237](#)
- ♦ [Chapter 15, “Search List Portlet Reference,” on page 269](#)



# About Portlets

This section provides information about the portlets you can use in the Identity Manager User Application. Topics include:

- ◆ [Section 10.1, “Accessory Portlets,” on page 209](#)
- ◆ [Section 10.2, “Admin Portlets,” on page 209](#)
- ◆ [Section 10.3, “Identity portlets,” on page 210](#)
- ◆ [Section 10.4, “System Components,” on page 212](#)

For more information about managing portlets, see [Chapter 7, “Portlet Administration,” on page 173](#).

Many of the portlets include preferences that enable you to customize the portlet’s behavior or appearance. You localize the preferences by clicking the Detail link in the *Content Preferences* page. As a general guideline, if the preference value is a free-form text input field, do not localize it unless the value is a message displayed in the user interface. You can; however, localize the preference name and description. Localizing a preference value, that is not a message, can cause the portlet to malfunction.

## 10.1 Accessory Portlets

Accessory portlets provide a diverse set of functions that you can add to your Identity Manager User Application. Accessory portlets provide e-mail, file system, and other functions. For more information, see the *Identity Manager Accessory Portlet Reference Guide*.

## 10.2 Admin Portlets

The portlets in the Admin category are used to control the layout and contents of the user interface.

---

**IMPORTANT:** You should not use or modify these portlets. They provide framework services to the User Application.

---

[Table 10-1](#) describes Admin portlets.

**Table 10-1** *Admin Portlets*

Portlet Name	Description
Header Portlet	Displays the header information and top-level tab controls for the user interface.  There are no preferences for this portlet.

Portlet Name	Description
Shared Page Navigation	<p>Displays a menu containing the Identity Manager User Application shared pages.</p> <p>Preferences define what is displayed and how it is displayed.</p> <p>See <a href="#">Section 10.2.1, “Shared Page Navigation Portlet,” on page 210.</a></p>

## 10.2.1 Shared Page Navigation Portlet

The Shared Page Navigation portlet generates links to the Identity Manager User Application’s shared pages. Preference settings define the shared page links that are displayed. [Table 10-2 on page 210](#) describes the preferences for the Shared Page Navigation portlet.

**Table 10-2** *Shared Page Navigation Portlet: Preferences*

Preference	What to Specify
sharedpages-sorting	The order in which the shared pages are displayed within a category: Ascending/Descending.
sharedpages-sortmode	How to sort the shared pages: Alphabetical or Priority.
sharedpages-category	<p>Specify one or more of the shared pages categories.</p> <p>The category name displays as a header with all of the shared pages in that category displayed as links. If a category does not contain any shared pages, then it does not display. If the shared page is not in a category, then it displays as uncategorized.</p>
guest-category	Specify a category whose portlets you want to display in the portal landing page. It must be a pre-existing category and the pages contained in this category must not have any ACL read constraints.

## 10.3 Identity portlets

The Identity portlets are used by the *Identity Self-Service* tab of the Identity Manager User Application. [Table 10-3 on page 210](#) lists the Identity portlets.

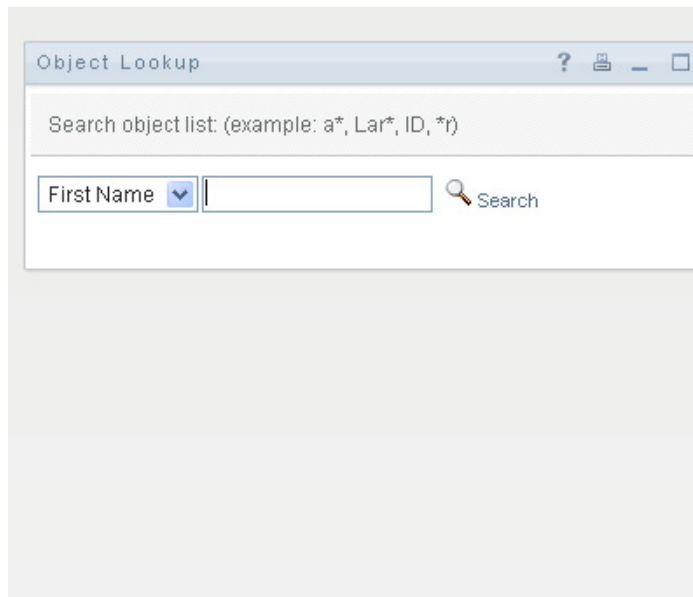
**Table 10-3** *Identity Portlets*

Portlet Name	Description
Associations Report	Shows the DirXML-Associations attributes for the logged on user. This attribute maps a user to an external application. There are no preferences for this portlet.
Create	<p>Provides a wizard-based interface that enables users to create objects in the Identity Vault.</p> <p>See <a href="#">Chapter 11, “Create Portlet Reference,” on page 213.</a></p>

Portlet Name	Description
Detail	Lets users display and manipulate an entity's attribute data. See <a href="#">Chapter 12, "Detail Portlet Reference,"</a> on page 221.
Org Chart	Lets users view and browse the hierarchical relationships between objects in the Identity Vault. See <a href="#">Chapter 13, "Org Chart Portlet Reference,"</a> on page 237.
Resource Request	Lets you provide access to resource requests to anonymous or guest users. You must create a new shared page for this portlet and ensure that the page is available to guest or anonymous users. See <a href="#">Chapter 14, "Resource Request Portlet,"</a> on page 267.
Search List	Allows users to search for objects in the Identity Vault. See <a href="#">Chapter 15, "Search List Portlet Reference,"</a> on page 269.

At runtime, the identity portlets might also call the ContainerLookup portlet or the ParamLookup portlet depending on user interaction. The ContainerLookup portlet is launched by the identity portlets when the user performs a lookup on a container object, and the ParamLookup portlet is launched when the user performs a lookup on an attribute. Users launch these portlets by clicking the Lookup button. These portlets have a similar runtime appearance.

**Figure 10-1** Sample ParamLookup Portlet



These portlets are also referred to as object selectors, and their contents are defined by the DNLookup definition in the directory abstraction layer. There are no preferences for these portlets, and you cannot add them to a page. The only time you might modify them is when you allow guest access to the identity portlets. The modifications that you need to make for guest access are described in each identity portlet reference section.

## 10.4 System Components

The system portlets provide services to the Identity Manager User Application.

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**IMPORTANT:** You should not use or modify portlets in this category.

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Table 10-4 on page 212 lists the system portlets.

*Table 10-4 System Portlets*

Portlet Name	Description
Portal Page Controller	Displays the shared page that the user has currently selected via the Shared Page Navigation portlet.  There are no preferences for this portlet.



This section describes how to use the Create portlet in your Identity Manager User Application. Topics include:

- ◆ [Section 11.1, “About the Create portlet,” on page 213](#)
- ◆ [Section 11.2, “Configuring the Create Portlet,” on page 215](#)
- ◆ [Section 11.3, “Setting Preferences,” on page 217](#)
- ◆ [Section 11.4, “Configuring the Create Portlet for Self-Registration,” on page 218](#)

## 11.1 About the Create portlet

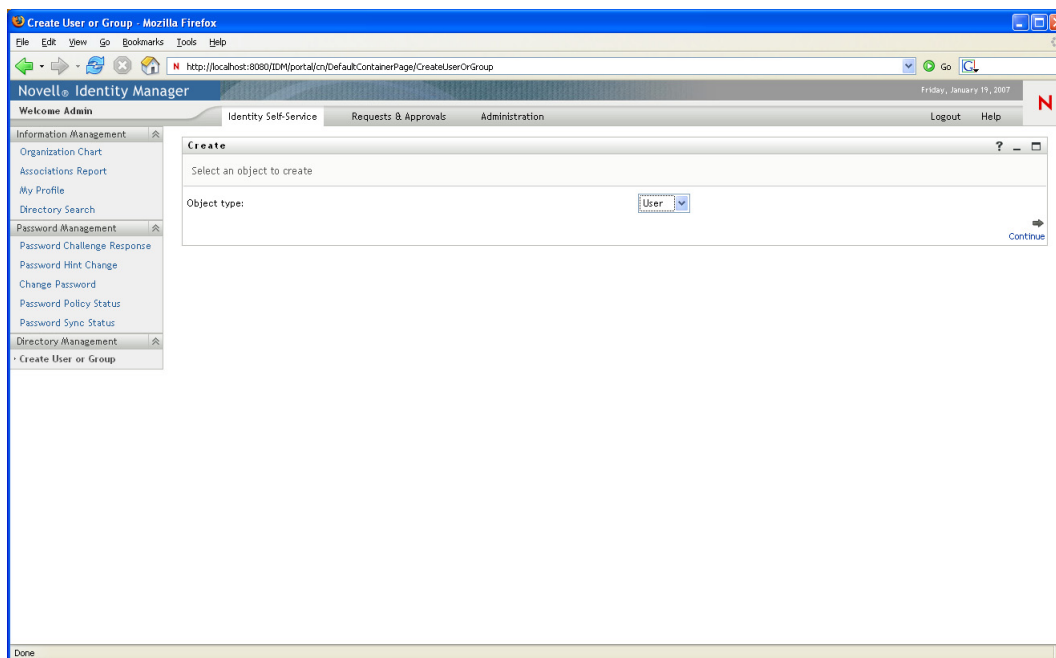
The Create portlet provides an easy-to-use wizard that allows users to create Identity Vault objects of different types. Portlet preferences control the following:

- ◆ The types of objects that the user can create.
- ◆ The attributes that the user can supply.

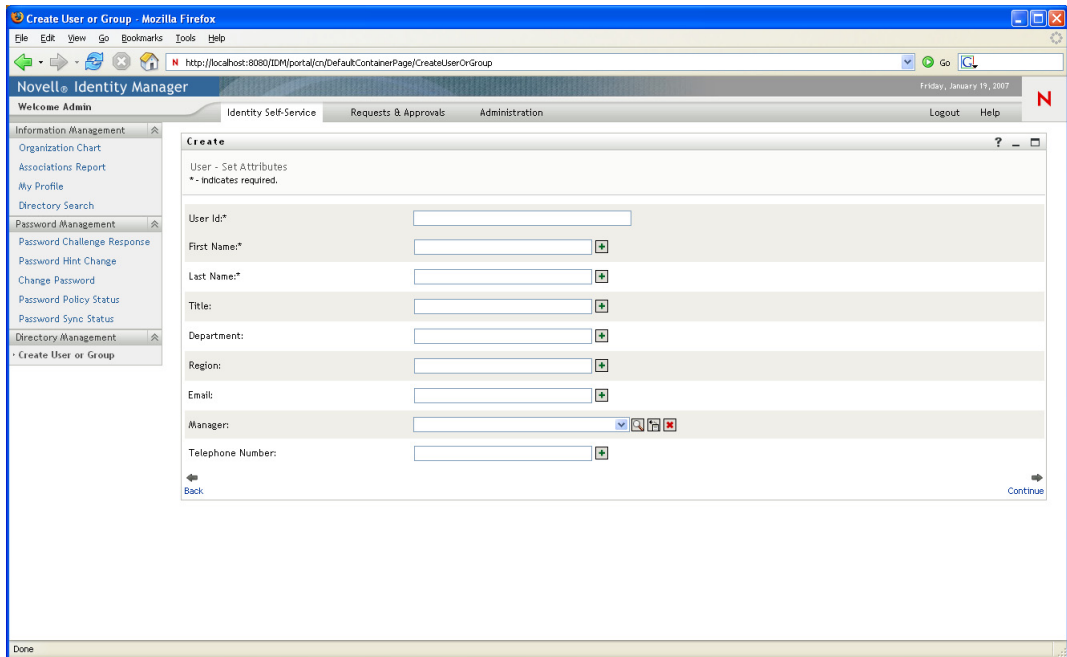
You can also configure the portlet to allow guest users to self-register.

The default configuration of the Create portlet (accessed via the *Create User or Group* action of the Identity Manager User Application) allows users to create a User or a Group. This portlet is restricted, by default, to the User Application Administrator. The following example shows how the default Create portlet wizard prompts the user to:

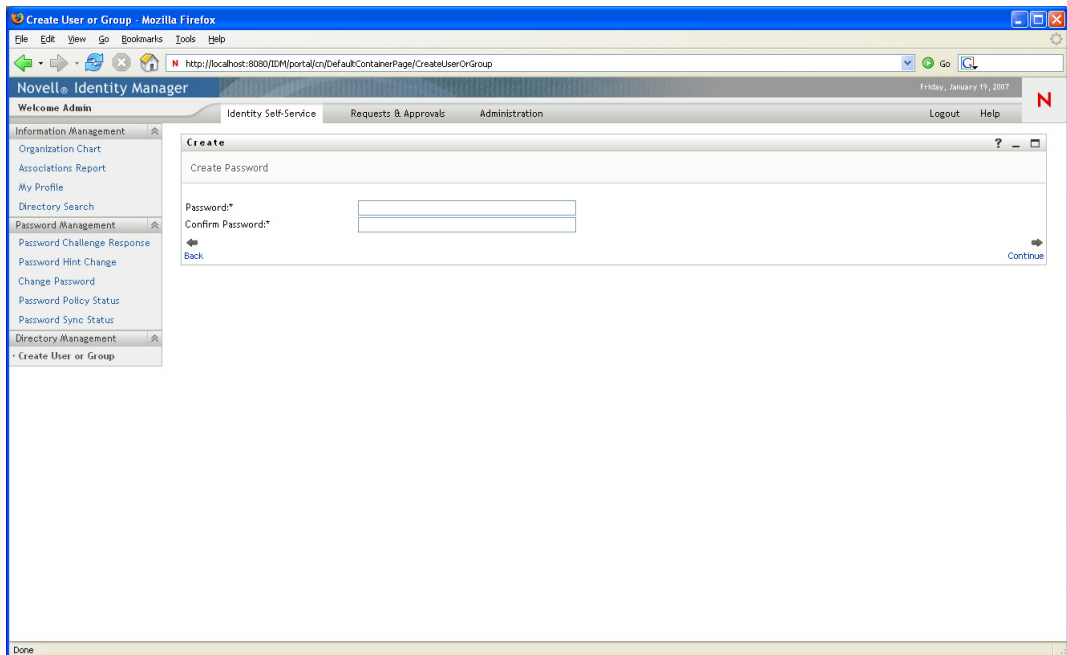
- ◆ Select the type of object to create:



- ◆ Populate the object’s attributes:



- ◆ Prompt for a password, when required by the object type:



If a password policy is assigned, the portlet displays any custom policy messages.

- ◆ Provide an informational message when the object is successfully created. The message contains a link to the Detail portlet for that object for further editing (assuming the Detail portlet is likewise configured).

## 11.2 Configuring the Create Portlet

Follow the steps in [Table 11-1 on page 215](#) to configure the Create portlet.

**Table 11-1** *Steps to Configure the Create Portlet*

Step	Task	Description
1	Decide if the default Create User or Group feature meets your needs.	If it does, then you do not need to take any further action; otherwise complete the remaining steps.
2	Define the types of objects that you want to allow users to create.	Add the objects and attributes to the directory abstraction layer.  For more information, see <a href="#">Section 1.2.2, “Directory Abstraction Layer,” on page 24</a> .
3	Determine how you want users to access this new portlet.	Do you want users to launch this portlet from an existing or a new page? Which users can access the portlet and the page?  For more information about pages, see <a href="#">Chapter 6, “Page Administration,” on page 139</a> .
4	Specify the users that have access to the page and the portlet instance.	Edit the page security and add the users to the list. For more information on restricting user access to pages, see <a href="#">Chapter 6, “Page Administration,” on page 139</a> .  Edit the portlet instance to change security. For more information on restricting user access to portlets, see <a href="#">Chapter 7, “Portlet Administration,” on page 173</a> .  Do you want anonymous users to access this portlet? For more information on setting up the Create portlet specifically for anonymous access, see <a href="#">Section 11.4, “Configuring the Create Portlet for Self-Registration,” on page 218</a> .
5	Set preferences for the portlet.	Preferences let you define: <ul style="list-style-type: none"><li>◆ Which objects users can create.</li><li>◆ Which attributes to supply during the create.</li></ul> For more information, see <a href="#">Section 11.3, “Setting Preferences,” on page 217</a> .
6	Test.	Verify that the objects are created and that the attributes are populated properly.
7	Establish the proper effective rights in eDirectory™ for your users.	Make sure the users have sufficient rights to create the object.

### 11.2.1 Directory Abstraction Layer Setup

Objects that can be created and attributes that can be populated by users of the Create portlet must be defined in the directory abstraction layer, as described in [Table 11-2 on page 216](#).

**Table 11-2** Settings for the Directory Abstraction Layer

Definition Type	Property	Value
entity	<i>create</i>	Selected.
	<i>view</i>	Selected.
	<i>Create</i>	<p>If it is not selected, the entity does not display in the list of entities that can be created.</p> <p><i>Container for Create:</i> Specify a valid Identity Vault container. If you do not assign a container, the user is prompted to select one. The user is allowed to select any container beginning with the root container specified during the User Application installation. For anonymous users, it is recommended that you specify a <i>Container for Create</i>. If you do not, then you must also modify the security setting for the <i>ContainerLookupPortlet</i>, as described in <a href="#">Section 11.4, “Configuring the Create Portlet for Self-Registration,”</a> on page 218.</p> <p><i>Create naming attribute:</i> Specify the entity’s naming attribute. This shows up in the Create portlet as the Object ID. You can specify different text to display by using the <i>Create naming label</i>.</p> <hr/> <p><b>NOTE:</b> Because the naming attribute is defined in this way, you do not need to add it to the directory abstraction layer as a separate attribute.</p> <hr/> <p><i>Password Management: Password Required When Entity is Created</i></p> <p>Selected, if the entity type requires a password on create.</p> <p>If the Create portlet is configured to create users and you want to assign the users to an iManager password policy, then you must also assign this container to the same iManager password policy. This ensures that users created in the User Application are automatically assigned to the default iManager password policy.</p> <p>By default, anyone who has access to the Create Users and Groups action and has Trustee rights to the OU can create users and assign the initial password. When the new user first logs in, he or she is redirected to the Change Password page to modify the initial password. You can change the default behavior via the <i>Expire password on initial login</i> preference.</p> <p>For more information on this preference, see <a href="#">Section 11.3, “Setting Preferences,”</a> on page 217.</p> <p>For more information on the Change Password page, <a href="#">Section 5.3.1, “About Password Management Features,”</a> on page 121.</p>
attribute	<i>enabled</i>	Selected.
	<i>viewable</i>	If enabled or viewable are not selected (false), the attribute cannot be used by the portlet.

For more information on setting up the abstraction layer, see [Section 1.2.2, “Directory Abstraction Layer,”](#) on page 24.

## 11.3 Setting Preferences


Preferences allow you to configure the types of objects and the attributes that users are prompted for. There are two types of preferences: general and complex. The general preferences are described in [Table 11-3 on page 217](#) followed by the complex preferences in [Table 11-4 on page 217](#).

**Table 11-3** *Create Portlet: General Preferences*

Preference	Description
<i>Detail Portlet Name</i>	Specify the instance of the Detail Portlet to display when the user clicks the <i>Object Created</i> link after the object is successfully created. It defaults to the standard DetailPortlet. See <a href="#">Section 12.6, “Setting up Detail for Anonymous Access,”</a> on page 235.
<i>Custom Class Name</i>	Specify the name of the class for processing create events. The default is <code>com.novell.srvprv.impl.portlet.create.CreateCustomEventDefaultHandler</code> .
<i>Expire password on initial login</i>	Specify whether to expire the newly created user’s password on initial login (True), or whether to default to the Identity Vault’s password policy <i>GraceLogin</i> setting.
<i>Display password with attributes</i>	Specify whether to display the password on the same page as the other attributes (True) or on its own page (false).
<i>Create Virtual Entity complex preference</i>	Click <i>View/Edit Custom Preference</i> to access the Entity and Attribute definitions for the create portlet. The preferences are described in <a href="#">Table 11-4 on page 217</a> .

**Table 11-4** *Create Portlet: Complex Preferences*

Preference	Description
<i>Entity Definition</i>	<p>The name of the object type to create. This represents the beginning of an entity definition block where you define how the portlet handles the create operation.</p> <p>Objects listed in the complex preferences are displayed to the user in a drop-down list. To restrict the objects that users can create, remove objects from this preference sheet with the delete button. To add other entities, click <i>Add Entity Definition</i> and complete the wizard.</p>

Preference	Description
<i>Attributes</i>	<p>Controls the attributes that the user is prompted to populate. You must include all of the object's required attributes; otherwise, the actual create of the object will fail. In addition, the preferences do not save properly if a required attribute is missing.</p> <p>To add or remove an attribute:</p> <ul style="list-style-type: none"> <li>◆ Click the <i>Modify Attributes</i> button.</li> </ul>  <ul style="list-style-type: none"> <li>◆ To add an attribute, select it (from the list of Available attributes). You can multi-select attributes by using the Ctrl or Shift keys.</li> <li>◆ Click the arrow to move the attribute to the <i>Selected</i> list. Do the reverse to remove an attribute.</li> <li>◆ To reorder the attributes list, click the up and down arrows to the right of the <i>Selected</i> list. Click <i>Submit</i>.</li> </ul> <p>Attributes and data types:</p> <p>The attribute's data type affects the way it is displayed. For example, if an attribute is defined as a Local or Global list subtype, then it displays in a list box.</p> <hr/> <p><b>NOTE:</b> The create portlet automatically prompts for an object ID. (The label displays as the entity type and appends the string ID, for example, user ID or Group ID.) The object ID is the naming attribute for the object. for the object. You do not have to add the CN as an attribute.</p> <hr/> <p>For more information, see the <i>Novel Identity Manager 3.5 User Application: Design Guide</i>.</p>

## Completing the Preferences Panel

To verify that you submitted valid entries, click *Submit*. If an entry is invalid, an error message is displayed at the top of the preferences page. Click *Return to List View* when you are able to click *Submit* and no errors occur. You must click *Save Preferences* when you return to List View.

## 11.4 Configuring the Create Portlet for Self-Registration

You can configure the Create portlet so that guest users are able to self-register. Enabling anonymous access to the create portlet is a two-step process. First, configure a Create portlet instance for anonymous use, then create a shared page to host the new portlet instance. You have the option to force the newly registered user to log in or to allow anonymous access to other identity self-service features. To create a portlet instance:

- 1 Go to the Portlet Admin page.
- 2 Register and name a new instance of the CreatePortlet, for example, *Self Registration*.
- 3 Select the new portlet instance, then click *Settings*.

4 Set *Require Authentication* to false, then click *Save Settings*.

5 Select *Preferences* and modify the preferences as needed.

For example, you could specify a *DetailPortlet* that supports anonymous access, or you could limit the set of attributes displayed by the default instance. (The changes you make to the default instance are reflected in other parts of the User Application that use that instance.)

---

**TIP:** If you do specify the default *DetailPortlet*, the user is forced to log in when viewing the detail of the newly created object. For details, see [Section 11.4.1, “Guest Access Required Settings,” on page 219](#)

---

To create a shared page:

1 Go to the *Page Admin* tab.

2 Create a new page.

3 Under *Assign Categories*, select *Guest Pages*. You can select other categories if you also want logged-in users to see this.

4 Click *Save Page*.

5 Click *Select Content*, add the new instance to the page, then click *Save Contents*.

6 Click *Assign Permissions* and make sure that *View Permissions Set to Admin Only* is unselected.

7 Save the page.

## 11.4.1 Guest Access Required Settings

Other required settings include:

- ♦ *Create container:* Every entity requires a create container. You can define a default create container for each entity type in the directory abstraction layer, or you can allow the user to select one. When you specify a default create container for the entity type, the user is never prompted for the container. When you do not specify a default, the user must select one. To allow anonymous users access to the selection list, you must change the *ContainerLookupPortlet* setting *Require Authentication* to false. For more information about the default Create container, see the section on the directory abstraction layer editor in the *Identity Manager 3.5 User Application: Design Guide*.
- ♦ *Identity Vault Rights:* The user is initially the guest user. When he or she self-registers, the User Application writes an object to the create container. To create a user object, the guest user must have create [Entry rights] in the container where new users are created. This could be inherited or restricted by using an inherited rights filter. The guest user must also have Write rights to the attribute(s) that they are allowed to create.
- ♦ *DNLookup controls:* If the user is required to provide a value for an attribute defined as a control type of *DNLookup*, you need to change the *ParamlistPortlet* setting *Requires authentication* to false.
- ♦ *Detail portlet:* When the object is successfully created, the portlet displays a link to the object displayed, via the Detail portlet. The default Detail portlet requires authentication so that users are forced to log in with the new identity credentials before they are able to view the detail. You can create a separate instance of the detail portlet for anonymous login, or you can modify the default detail portlet so that *Requires authentication* is set to false. See [Section 12.6, “Setting up Detail for Anonymous Access,” on page 235](#).

- ◆ Passwords: If you allow an anonymous user to create an entity that requires a password, you must ensure that the anonymous account has the rights to create a password.



# Detail Portlet Reference

This section describes the Detail portlet, which lets users display and manipulate an entity's attribute data. The detail portlet is the basis for the *My Profile* action in the Identity Manager User Application's *Identity Self-Service* tab. Topics include:

- ◆ [Section 12.1, “About the Detail portlet,” on page 221](#)
- ◆ [Section 12.2, “Prerequisites,” on page 230](#)
- ◆ [Section 12.3, “Launching Detail from Other Portlets,” on page 231](#)
- ◆ [Section 12.4, “Using Detail on a Page,” on page 232](#)
- ◆ [Section 12.5, “Setting Preferences,” on page 232](#)
- ◆ [Section 12.6, “Setting up Detail for Anonymous Access,” on page 235](#)

## 12.1 About the Detail portlet

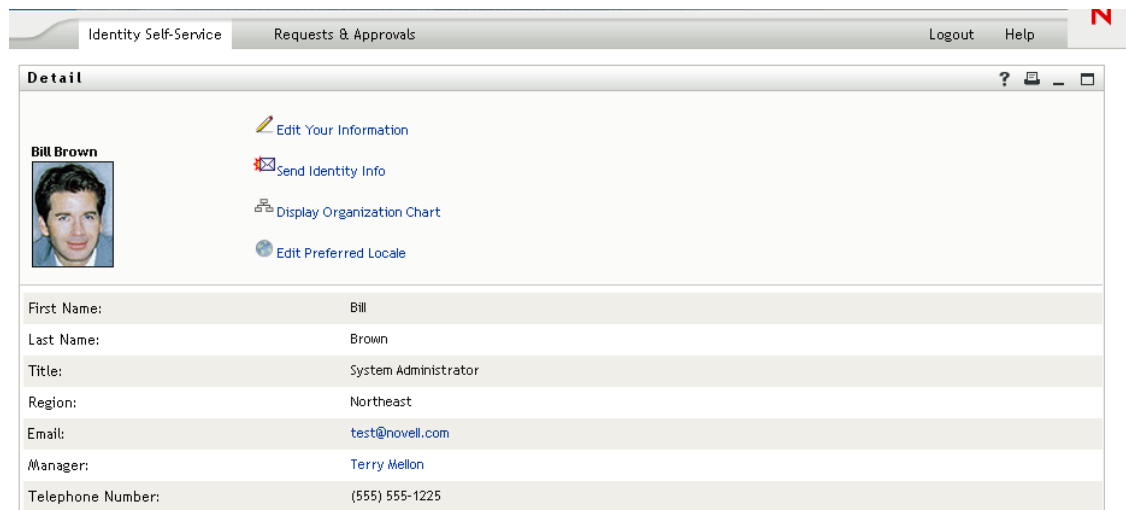
The Detail portlet provides users with a detailed view of an entity's attributes and their values. The portlet has two modes: display and edit. When accessing the Detail portlet, users can take advantage of its built-in capabilities to work with this information, including:

- ◆ [Section 12.1.1, “Displaying Entity Data,” on page 221](#)
- ◆ [Section 12.1.2, “Editing Entity Data,” on page 225](#)
- ◆ [Section 12.1.3, “E-Mailing Entity Data,” on page 227](#) (display mode only)
- ◆ [Section 12.1.4, “Linking to an organization chart,” on page 228](#) (display mode only)
- ◆ [Section 12.1.5, “Linking to Details of Other Entities,” on page 228](#) (display mode only)
- ◆ [Section 12.1.6, “Printing Entity Data,” on page 229](#) (display mode only)
- ◆ [Section 12.1.7, “Setting Preferred Locale,” on page 230](#) (display mode only)

### 12.1.1 Displaying Entity Data

When accessed, the Detail portlet displays attribute data about a selected entity, such as a user or group. For example, [Figure 12-1](#) displays what the Detail portlet might display when user Bill Brown selects the *My Profile* action.

**Figure 12-1** Sample MyProfile Data



**User images.** By default, the Detail portlet is configured to include the User Photo attribute. However, if your Identity Vault does not include this attribute or it is not populated, a default image is displayed at runtime. If you store your user images in a different location, you can configure the portlet to display them from that location instead.

For more information, see [“Dynamically loading images.” on page 225.](#)

### Determining Which Attributes Display

The Detail portlet (display mode) displays the attributes that

- ◆ Your directory abstraction layer data definitions make available for viewing.  
For more information on directory abstraction layer configuration, see [Section 1.2.2, “Directory Abstraction Layer,” on page 24.](#)
- ◆ Are specified in the *Attributes to display in view mode* preference.  
To learn about specifying which attributes display in the Detail portlet, see [Section 12.5, “Setting Preferences,” on page 232.](#)
- ◆ The current user has rights to view.  
For instance, managers with rights to the salary attribute will see that data, but other users won’t.  
For more information, see [Section 12.2.2, “Assigning rights to entities,” on page 231.](#)
- ◆ Are currently populated with a value.

### Determining How Attributes Display

When displaying attributes, Detail formats the data as text, with some exceptions. Exceptions are listed in [Table 12-1 on page 223.](#)

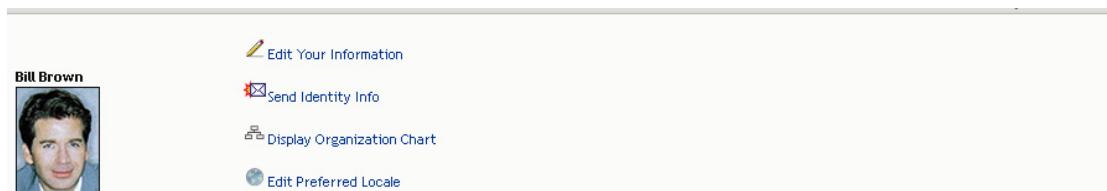
**Table 12-1** Detail Portlet: Attributes That Do Not Display As Text

Format Specification in Directory Abstraction Layer Definition	How It Displays
Format: email	As a mail-to link
Format:	As an icon that initiates a chat and adds that user
<ul style="list-style-type: none"> <li>◆ groupwise-im</li> <li>◆ aol-im</li> <li>◆ yahoo-im</li> </ul>	
Data type: Binary	As the image
Format: image	
Data type: Boolean	As disabled radio buttons indicating true or false
	The buttons display without indicating a default value because the attribute is not actually created for the user until a value is specified.
Multivalue: Selected	A comma-separated list
Control type: DNLookup	As a link
	In the example above, a link ( <code>Terry Mellon</code> ) displays to access the Detail data of Bill Brown's manager.
Control type:	As the display-label rather than the actual (key) value
<ul style="list-style-type: none"> <li>◆ Local List</li> <li>◆ Global List</li> </ul>	For example, the <code>EmployeeType</code> attribute displays <code>Full Time</code> instead of the actual value <code>ft</code> .

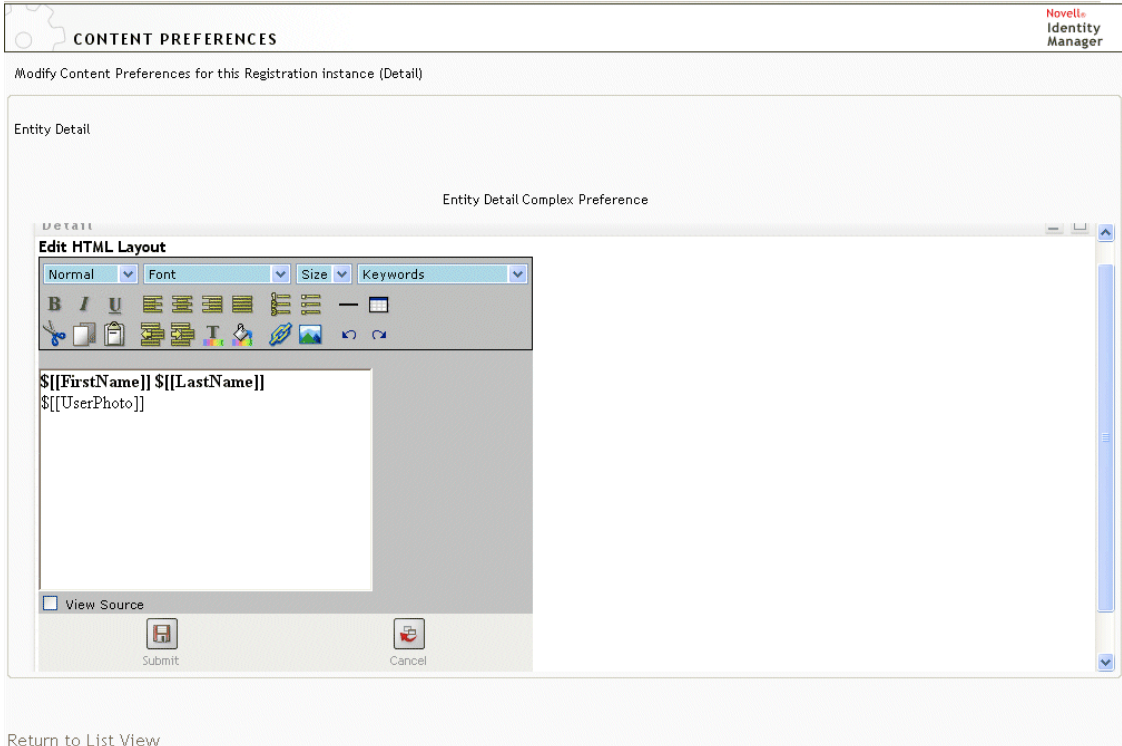
## Determining What the Heading Area Displays

You can lay out the heading area of the Detail portlet using standard HTML features.

**Figure 12-2** Detail Portlet: Heading Area



The Detail preferences provide an HTML Layout Editor that you can use to create the look and content you want:



## Using the HTML Layout Editor

The HTML Layout Editor provides the typical features of an HTML editor for defining text formatting and lists, and for specifying anchors, images, and so on.

**Keywords.** When designing your layout, you can use the *Keywords* drop-down list to insert variables within the heading area of the Detail portlet to be replaced at runtime with specific attribute values. You can also type them using this syntax:

```
$ [ [ keyword ] ]
```

Where *keyword* is the value of an attribute such as `LastName`.

You can concatenate attributes using this syntax:

```
$ [ [ keyword+keyword ] ]
```

For example:

```
$ [ [ FirstName+LastName ] ]
```

You can concatenate as many attributes as you want and can also include quoted strings like this:

```
$ [ [ keyword+"sample text"+keyword ] ]
```

This renders the values of the keywords and the quoted text.

---

**NOTE:** When manually typing a keyword placeholder instead of selecting it from the dropdown list, make sure that it does not contain HTML formatting. It is recommended that you use the View Source mode for manual entry of keywords. When a keyword is mistyped in a layout, it is rendered as-is at runtime (including the `$[[]]`).

---

**Dynamically loading images.** To display images that are stored in your Identity Vault (such as user photos), you can add the attribute name using the HTML Layout Editor. For example, adding the User Photo attribute displays the user's photo. If you store images outside the Identity Vault, you'll need to use the IMG: tag (from the View Source mode of the HTML Editor) as follows:

- 1 Go to the portlet's preferences and access the HTML Editor.
- 2 Click *View Source*.
- 3 Use the IMG: tag to combine a location, an attribute key, and a file extension using a syntax like this:

```
[[IMG:"URL" + attribute-key-name + "fileextension"]]
```

The following example shows the syntax you would use if you stored employee photos as JPG images by Last Name in the /images subdirectory of your application server:

```
[[IMG:"http://myhost:8080/images/"+LastName+".jpg"]]
```

At runtime, the portlet concatenates the URL with the LastName attribute and the file extension.jpg.

The HTML Editor supports a flexible syntax. It supports any combination of text and attributes so that the syntax is

```
[[IMG:"some text" + attribute-key-name + ...]]
```

## 12.1.2 Editing Entity Data

The Detail portlet automatically provides an *Edit* link (such as *Edit Your Information* or *Edit User*) to switch from display mode to edit mode. This enables users with appropriate rights for the current entity to change its attribute values and save those changes.

For example, here's what Detail might display when user Bill Brown (who has the necessary rights) edits his own information:

**Figure 12-3** MyProfile Edit Mode

The screenshot shows a web application window titled "Detail" with standard window controls. Below the title bar, the text "Edit: User" is displayed, followed by a note: "\* - indicates required." The main content area is a form with two columns: "Attribute" and "Value".

Attribute	Value
First Name:*	Bill
Last Name:*	Brown
Title:	System Administrator
Department:	
Region:	Northeast
Email:	test@novell.com
Manager:	Terry Mellon
Group:	Information Technology
Telephone Number:	(555) 555-1225
User Photo:	<input type="radio"/> Hide <input checked="" type="radio"/> Display

Below the form, there is an "Add Image" button with a plus sign icon, a small square image placeholder, and a "Replace or Delete Image" button with a checkmark icon.

At the bottom of the window, there are two buttons: "Save Changes" and "Cancel".

**NOTE:** For Boolean attributes, when both radio buttons are unselected it means that the attribute does not exist for the user. Selecting *true* or *false* creates the attribute for the user and also sets its value.

### Determining Which Attributes Display

In edit mode, you can specify the attributes to display and their display order by using the Detail portlet's *Attributes to display in edit mode* preference. In addition, the Detail portlet displays only attributes that

- ◆ Are defined as viewable in the directory abstraction layer data definitions.  
For more information on data definitions, see [Section 1.2.2, "Directory Abstraction Layer,"](#) on page 24.
- ◆ The current user has rights to view.  
For instance, managers with rights to the salary attribute will see that data, but other users won't.  
For more information, see [Section 12.2.2, "Assigning rights to entities,"](#) on page 231.

## Determining How Attributes Display

In edit mode, Detail formats each editable attribute as a text box, except in the following cases:

**Table 12-2** *Detail Portlet: Recognizing Non-Text-Box Editable Attributes*

Attribute Type Specification (in directory abstraction layer)	How It Displays
Data type: Binary Format: image	As a button and link to the Entity Image Upload portlet for viewing, updating, or adding the image
Data type: Boolean hide: Selected multivalue=Selected	As radio buttons indicating true or false As radio buttons labeled <i>Hide</i> and <i>Display</i> As a set of controls for editing, adding, and removing attribute values
Control type: DNLookup	As a button to launch the Param List portlet for searching and selecting a DN
Control type: <ul style="list-style-type: none"><li>◆ Local list</li><li>◆ Global list</li></ul>	As a drop-down list (allowing multiple selections if applicable)

Attributes that can't be edited (either by definition or because of inadequate user rights) display as *disabled* or *read only*.

### Validating Changes

During editing, data validation is automatically performed for the following attribute type specifications:

- ◆ Format: email
- ◆ Data type: Integer
- ◆ Control type: Range

When using a control type of local or global list, it is possible for the displayed list to include values that are outside of an attribute's specified bounds. However, such values are flagged as out-of-range, and validation prevents them from being submitted.

### 12.1.3 E-Mailing Entity Data

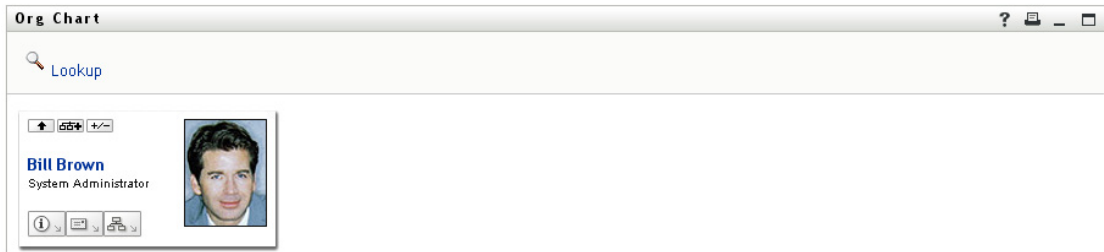
The Detail portlet automatically provides a link named *Send Identity Info*. Users can click it to e-mail the URL of the current entity's Detail to one or more other users. By e-mailing the Detail URL rather than the actual information, security is maintained because anyone receiving the URL will need appropriate authority to use it.

## 12.1.4 Linking to an organization chart

The Detail portlet automatically provides a link named *Display Organization Chart*. Users can click it to display the Org Chart portlet for the current entity.

For example, if you're viewing Detail for user Bill Brown, clicking this link displays:

**Figure 12-4** *My Profile: Linking to Org Chart*



You can suppress automatic linking to the Org Chart by setting Detail's *Enable org chart display* preference to false. See [Section 12.5, "Setting Preferences," on page 232](#).

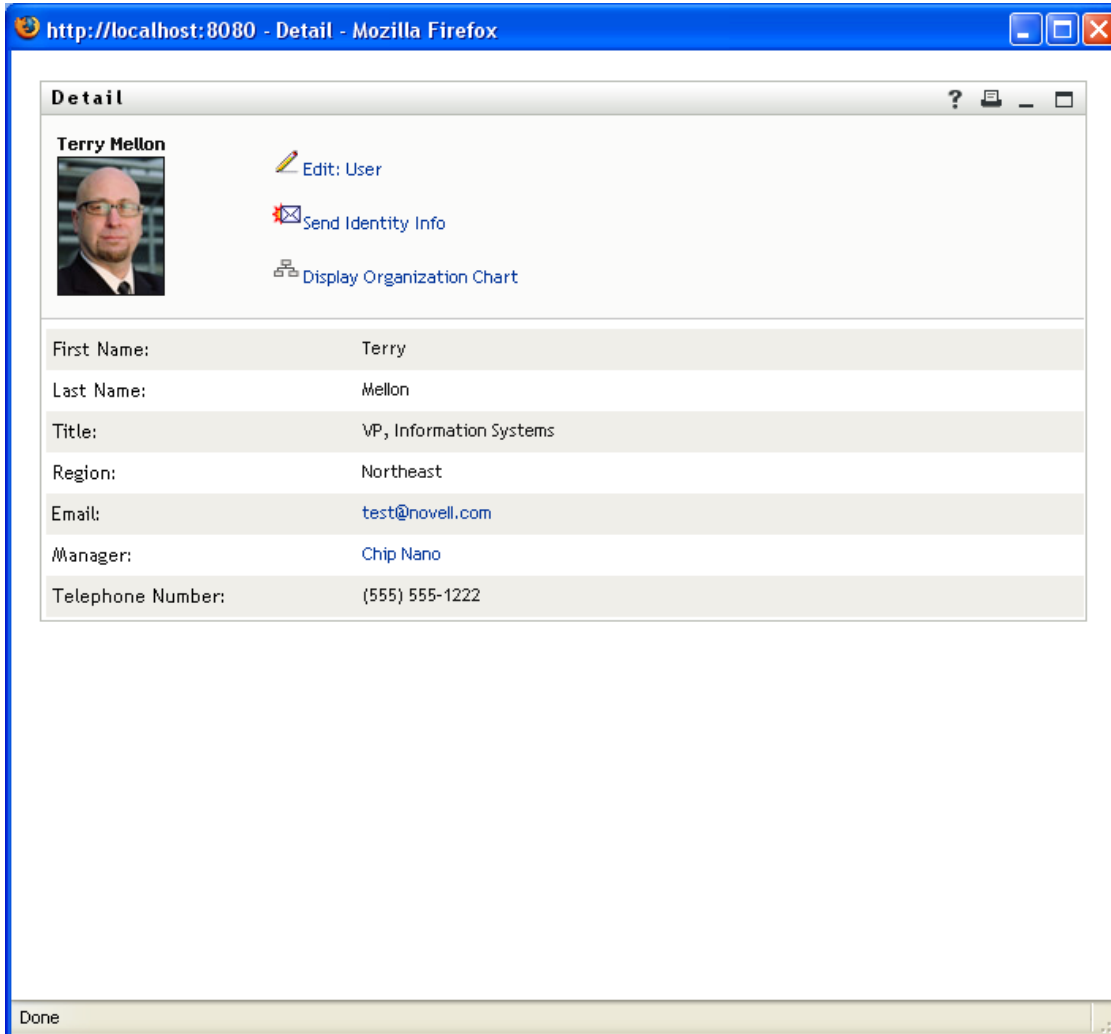
## 12.1.5 Linking to Details of Other Entities

When configuring the Detail portlet, you might want to enable users to link to related entities from the current one. You can do that by including attributes that are defined with the control type DNLookup (in your directory abstraction layer).

When the Manager attribute is displayed in a user's Detail, it appears as a link. Clicking that link displays Detail for the Manager.



Figure 12-5 Linking to Other Entities from My Profile



For more information on the directory abstraction layer, see [Section 1.2.2, “Directory Abstraction Layer,”](#) on page 24.

To learn about specifying which attributes display in the Detail portlet, see [Section 12.5, “Setting Preferences,”](#) on page 232.

### 12.1.6 Printing Entity Data

By default, the display settings for the Detail portlet enable the *Print* option on the portlet’s title bar. If you keep *Print* enabled, users can click it to display a printer-friendly version of the Detail content.

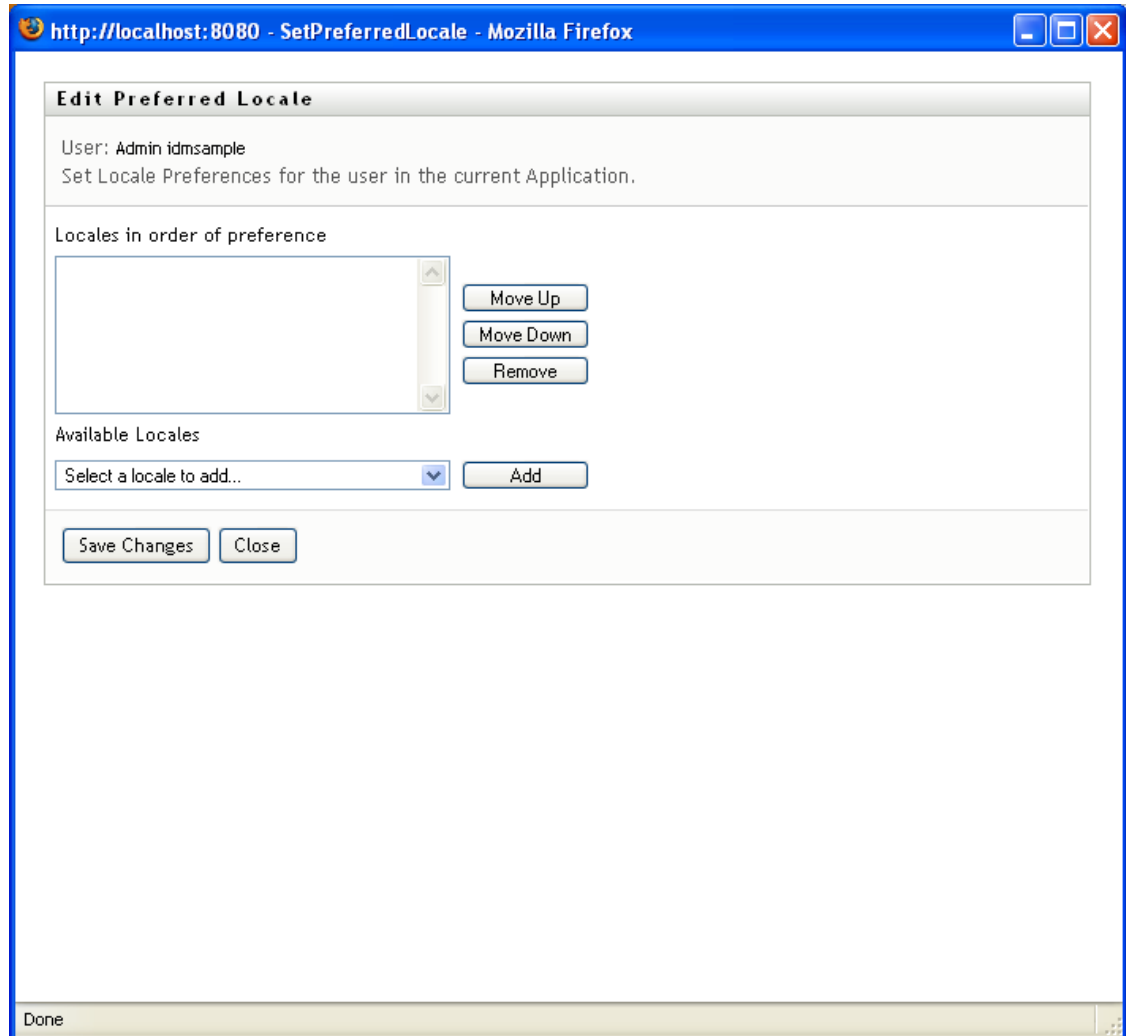
To change this or other settings for the Detail portlet, use the *Administration* tab to update the Portlet Registration for *DetailPortlet* (on the Portlet Administration page).

For more information, see [Chapter 7, “Portlet Administration,”](#) on page 173.

## 12.1.7 Setting Preferred Locale

The Detail portlet automatically provides a link named *Edit Preferred Locale*. It appears for an administrator or for a user editing their own information. Users can click it to display the settings, and they can use the dialog to change it. Changes to the preferred locale require that the user logout and log back in for the proper locale to display, otherwise, inconsistent locales can be displayed. For example, if you are viewing Detail for user Bill Brown, clicking this link displays:

**Figure 12-6** Sample Edit Preferred Locale Dialog



You can suppress the link by setting the *Enable edit of preferred locale* preference to false.

## 12.2 Prerequisites

Before you start using the Detail portlet, review the following information.

- ♦ [Section 12.2.1, “Configuring the Directory Abstraction Layer,” on page 231](#)
- ♦ [Section 12.2.2, “Assigning rights to entities,” on page 231](#)

## 12.2.1 Configuring the Directory Abstraction Layer

The Detail portlet depends on directory abstraction layer definitions in a variety of ways. Instructions on how to configure your abstraction layer data definitions to support specific Detail portlet features are provided in the following sections:

- ◆ [Section 12.1.1, “Displaying Entity Data,” on page 221](#)
- ◆ [Section 12.1.2, “Editing Entity Data,” on page 225](#)
- ◆ [Section 12.4, “Using Detail on a Page,” on page 232](#)

For more information on configuration, see [Section 1.2.2, “Directory Abstraction Layer,” on page 24](#).

## 12.2.2 Assigning rights to entities

In order to access an entity and its attributes in the Detail portlet, users must have the appropriate rights assigned in eDirectory™:

To Do This	A User Needs This Right
Display an attribute	Read
Edit an attribute	Write

You can assign rights by specifying that a user is a trustee of an object (entity). You can also specify the rights to assign for each of the attributes that are available via the Detail portlet.

## 12.3 Launching Detail from Other Portlets

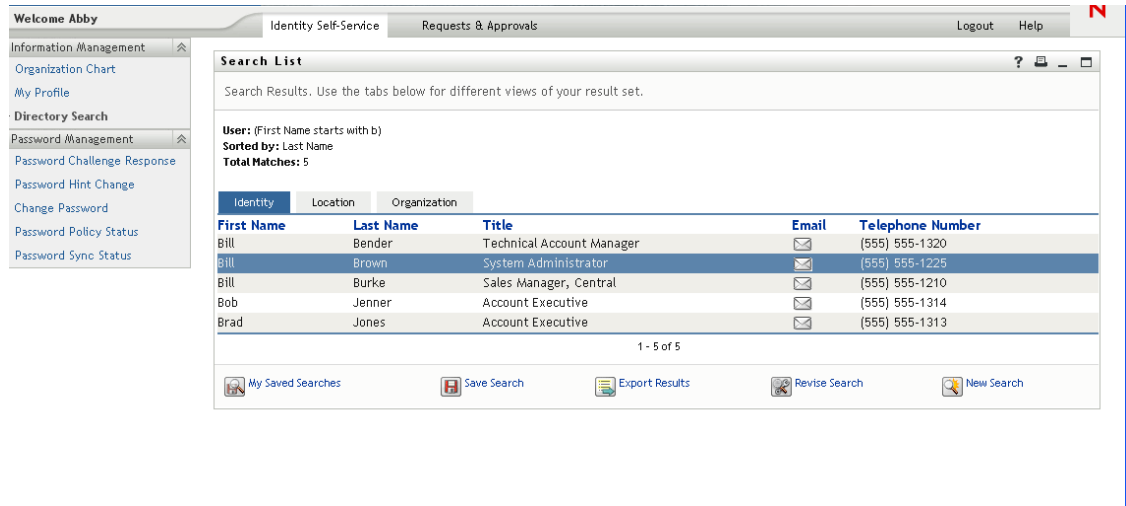
A common use of the Detail portlet is to launch it after selecting an entity from one of the other identity portlets. You can launch Detail from the Search List portlet or from the Org Chart portlet:

- ◆ [Section 12.3.1, “Launching Detail from the Search List Portlet,” on page 231](#)
- ◆ [Section 12.3.2, “From the Org Chart Portlet,” on page 232](#)

### 12.3.1 Launching Detail from the Search List Portlet

In the Search List portlet, users can click an entity row in the search results in order to display Detail for that entity. For example, clicking the Bill Brown row in the following list displays the Detail portlet with his attribute data:

**Figure 12-7** Launching Detail from Directory Search



For more information on the Search List portlet, see [Chapter 15, “Search List Portlet Reference,”](#) on [page 269](#).

## 12.3.2 From the Org Chart Portlet

In the Org Chart portlet, users can click the *Identity Actions* icon for an entity and then select *Show Info* to display details for that entity.

For more information on the Org Chart portlet, see [Chapter 13, “Org Chart Portlet Reference,”](#) on [page 237](#).

## 12.4 Using Detail on a Page

If you want to provide users with self-service for displaying and possibly editing their own attribute data, you can add the Detail portlet to a shared page. When used on a shared page, the Detail portlet automatically accesses the data of the current user.

## 12.5 Setting Preferences


To define the contents and appearance of the Detail portlet, you set preferences. The way you use the Detail portlet determines where you set its preferences:

- ♦ To learn about accessing portlet preferences from a shared or container page, see [Chapter 6, “Page Administration,”](#) on [page 139](#).
- ♦ To learn about accessing portlet preferences for a portlet registration, see [Chapter 7, “Portlet Administration,”](#) on [page 173](#).

### 12.5.1 About the Preferences

The Detail portlet has two preference pages: one for general preferences (shown in [Figure 12-8](#) on [page 233](#)) and one for complex preferences.

**Figure 12-8** Detail Preferences: General Preferences


**CONTENT PREFERENCES**

Modify Content Preferences for this Registration instance (Detail)

Entity Detail

	Preference	Preference Value	Req.	Read only	Hide
<a href="#">Reset</a>	OrgChart Portlet Name:	<input type="text" value="OrgChartPortlet"/>	<a href="#">Detail</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Reset</a>	Entity Detail Complex Preference:	<a href="#">View/Edit Custom Preference</a>		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save Preferences

Cancel

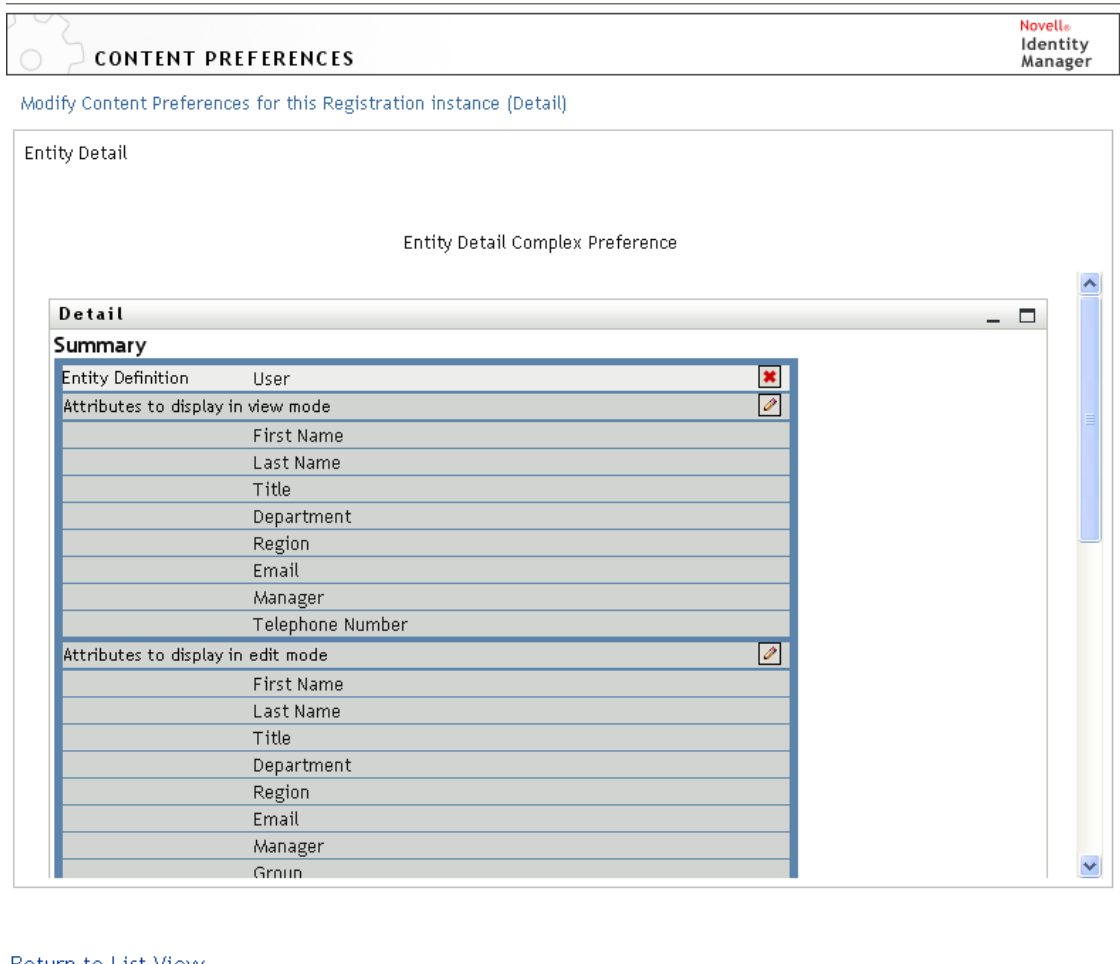
Descriptions

**Table 12-3** Detail Portlet: General Preferences

Preference	Description
OrgChart Portlet Name	The name of the registered instance of the org chart portlet that you want to launch if the enable org chart display preference is set to true.
Entity Detail Complex Preference	Click View/Edit Custom Preferences to access the detail portlet's complex preferences.

When you open this complex preference, the individual Detail preferences are presented:

**Figure 12-9** Detail Portlet: Complex Preferences



[Return to List View](#)

**Table 12-4** Detail Portlet: Complex Preferences

Preference	Details
Entity Definition	<p>Specifies the attribute list and HTML layout to display when Detail is used for a particular entity type (such as User, Device, or Group).</p> <p>You can click <i>Add Entity Definition</i> to specify Detail support for additional entity types.</p>
Attributes to display in view mode	<p>Specifies which attributes of the selected entity you want the portlet to display in view mode. These attributes are listed in the order you choose.</p> <p>A button is provided to let you add or remove attributes as needed.</p>
Attributes to display in edit mode	<p>Specifies which attributes of the selected entity you want the portlet to display in edit mode. These attributes are listed in the order you choose.</p> <p>A button is provided to let you add or remove attributes as needed.</p>

Preference	Details
HTML Layout	Provides a button to open the HTML Layout Editor, where you can design the heading area that the Detail portlet is to display for the selected entity.  For details, see <a href="#">“Determining What the Heading Area Displays” on page 223</a> .
Enable edit entity	Choose True if you want to enable the <i>Edit Your Information</i> link in the header of the detail portlet.
Enable send entity info	Choose True if you want to enable the <i>Send Identity Info</i> link in the header of the detail portlet.
Enable org chart display	Choose True if you want to enable the <i>Display Organization Chart</i> link in the header of the detail portlet.
Enable edit of preferred locale	Choose True if you want to display the <i>Edit Preferred Locale</i> link in the header of the detail portlet.

## 12.6 Setting up Detail for Anonymous Access

An anonymous user might navigate to the Detail portlet after completing the Create portlet or performing a Search. You can set up a special instance of the Detail portlet just for access by an anonymous or guest user. If you do not set up a separate instance for anonymous access, the user might be prompted to log in before being allowed to access any details of an Identity Vault object. As an alternative to setting up a unique instance for guest access, you could also change the authentication requirement of the standard detail portlet

To set up the detail portlet for anonymous access:

- 1 Go to *Administration > Portlet Admin*.
- 2 Register and name a new instance of the DetailPortlet, for example, Public Detail.
- 3 Select the new detail portlet instance.
- 4 Go to *Settings*. Set *Requires authentication* to false.
- 5 Click *Save Settings*.
- 6 Go to *Preferences* and modify the preferences as required. For example, you might want to change the entities or the attributes to display in view and edit mode.

If the anonymous user is allowed to view the detail without logging in, Detail does not display *Edit User* or *Edit Your Information* because the portlet detects that the user is not logged in and has no Edit rights. If the anonymous user is forced to log in, edit rights are determined by any policies set in eDirectory for new users in that container.





This section describes how to modify or add new org chart features to your Identity Manager User Application. Topics include:

- ♦ [Section 13.1, “About Org Chart,” on page 237](#)
- ♦ [Section 13.2, “Configuring the Org Chart Portlet,” on page 242](#)
- ♦ [Section 13.2.2, “Setting Preferences,” on page 243](#)
- ♦ [Section 13.3, “Configuring Org Chart for Guest Access,” on page 264](#)

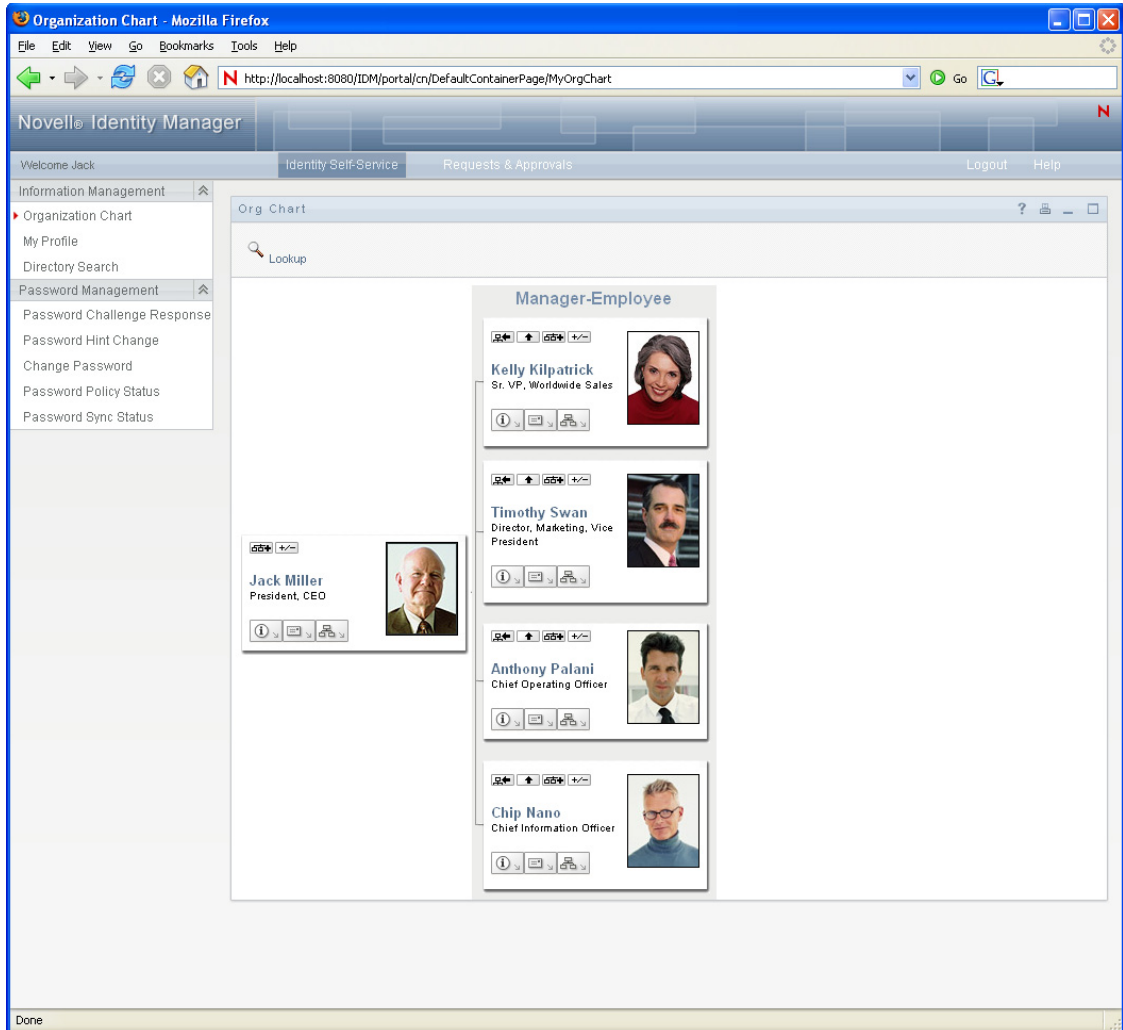
## 13.1 About Org Chart

The Org Chart portlet allows users to view and browse a graphical representation of the relationships between objects in the Identity Vault. For example, you can define Org Chart portlets that show relationships, such as





- ♦ An organization (such as employees and managers)
- ♦ A group’s membership (such as all of the employees in a group)
- ♦ Devices assigned to a user (such as cell phones and laptops)





The default configuration of the Identity Manager User Application *Identity Self-Service* tab includes an *Organization Chart* action. This action is an Org Chart portlet configured to show relationships among user objects in the Identity Vault. The following example shows how the default Org Chart portlet renders this relationship (using sample data).

**Figure 13-1** Default Org Chart



**Built-in links.** The Org Chart portlet includes these built-in links. The built-in links are configurable via the Org Chart Layout Preferences described in [“Org Chart Presentation Layout Preferences”](#) on page 253.

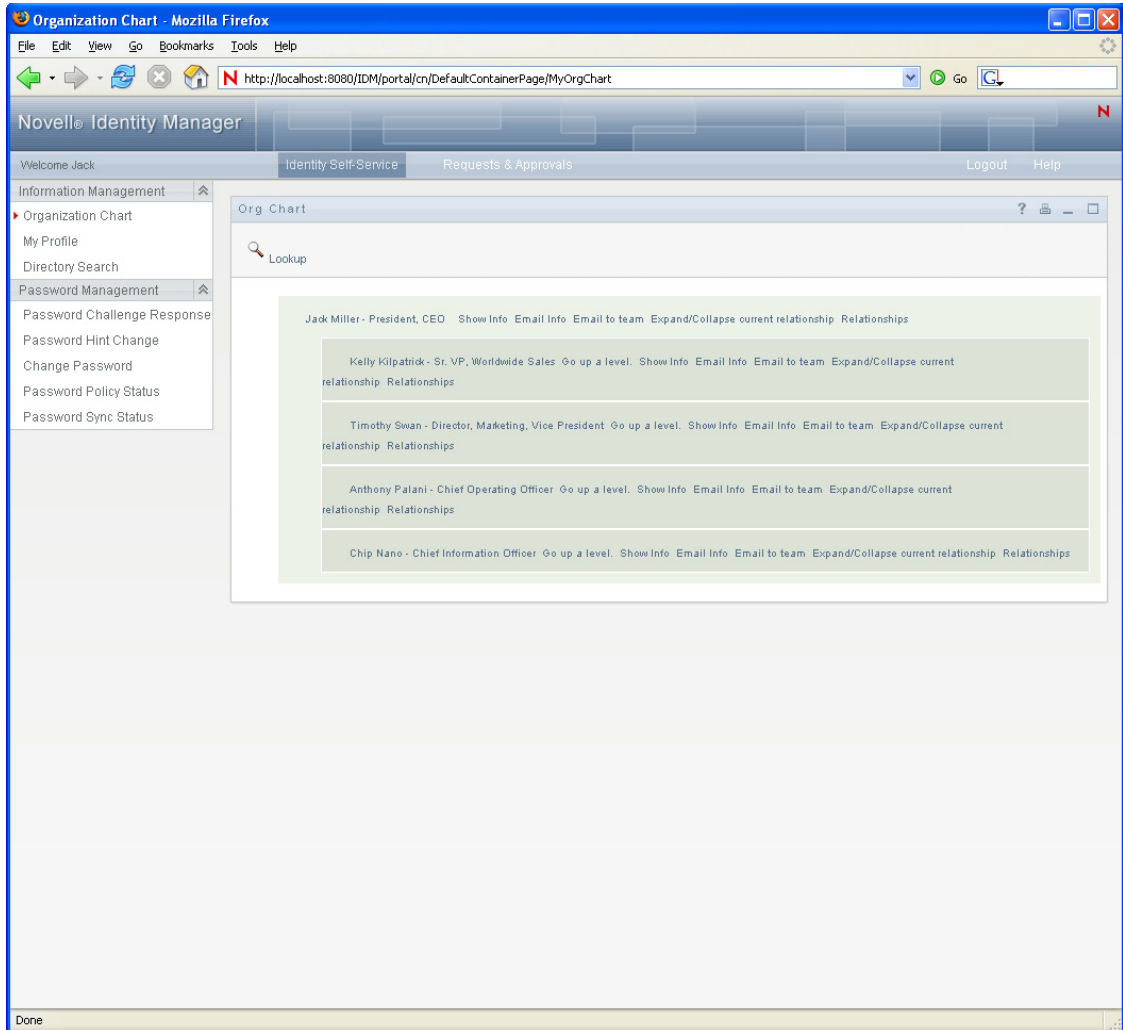
Link	Description
	Allows the user to navigate to the next upper level. This is only available when viewing a relationship where the target and source entities are the same type (such as user). Relationships are defined in the directory abstraction layer editor.
	Lets users expand or collapse the default relationship. The default relationship is defined in the preferences. It is the relationship that is initially displayed.
	Lets users reset the root of the org chart currently displayed. The root is the starting point or orientation point of the org chart.
	Lets users choose a relationship to expand or collapse from a drop-down list. If users choose to expand a relationship, Org Chart allows them to choose which direction to expand it (left or right).

Link	Description
	Launches the Detail portlet.
	<p>Displays a list of org charts. Lets users choose one or more org charts to view.</p> <p>This list of org charts is dynamic. It displays other org charts that share the same source entity type. For example, if you are viewing a manager/employee org chart (the source entity is user) and you click this icon, then the list of org charts you can view only contains relationships where the source entity is also user.</p>
	<p>Launches an e-mail tool to:</p> <ul style="list-style-type: none"> <li>◆ Send the identity details of the currently selected user.</li> <li>◆ Compose an e-mail.</li> </ul>
 <u>Lookup</u>	Allows users to perform entity searches. The searches result in the found entity becoming the top node of the chart displayed. (This is not configurable via preferences.)

For more information about adding and restricting the built-in links on your org charts, see “[Org Chart Presentation Layout Preferences](#)” on page 253.

Org Chart also provides a view of the relationships in a 508-compliant format. You can set preferences that display this view by default or as an option. [Figure 13-2](#) shows the same Org Chart data as [Figure 13-1](#) but in the 508-compliant format.

Figure 13-2 Org Chart Accessible View



### 13.1.1 About Org Chart Relationships

The Org Chart portlet displays relationships that are defined in the directory abstraction layer. The following relationships are available after the Identity Manager User Application is installed:

- ◆ Group's membership
- ◆ Manager-Employee
- ◆ User Groups

To learn more about creating or modifying Org Chart relationships, see [Section 1.2.2, "Directory Abstraction Layer,"](#) on page 24.

---

**NOTE:** Dynamic groups are not fully supported by the Org Chart portlet. You cannot define a dynamic group as the source entity of a relationship, but you can define a dynamic group as the target entity in a relationship.

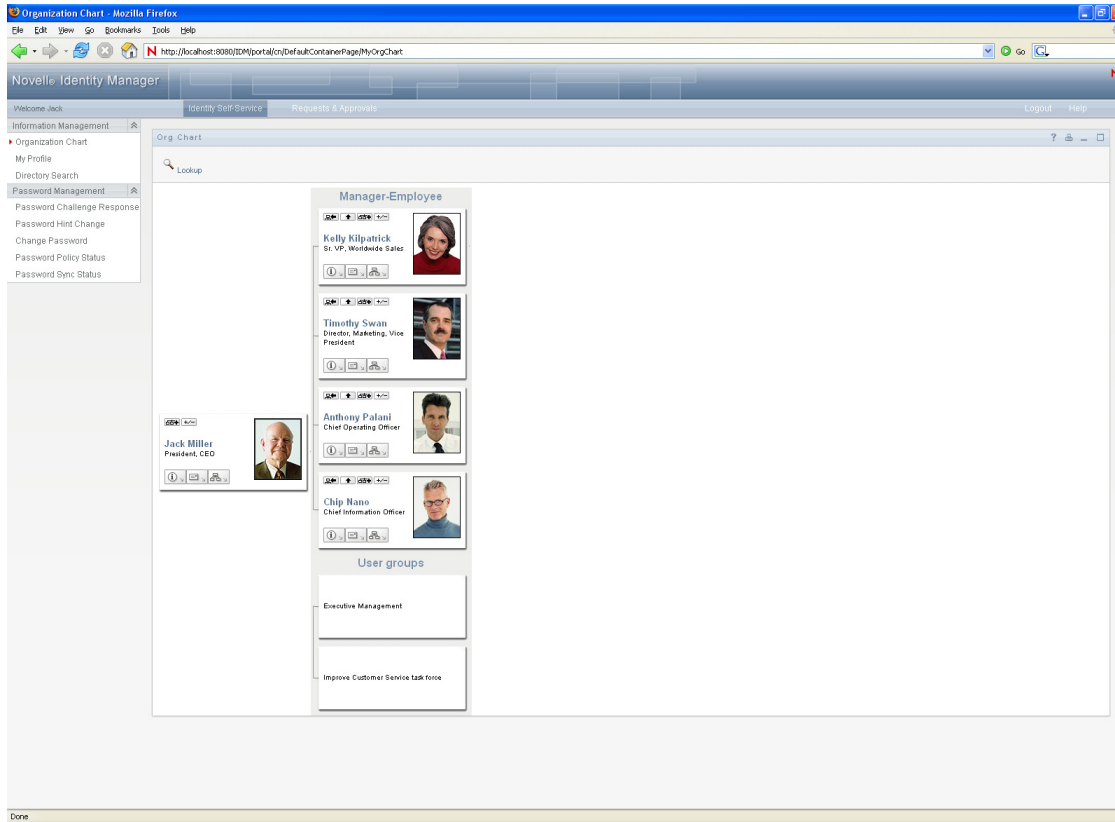
---

## 13.1.2 About Org Chart Display

The Org Chart portlet can display in HTML mode (the default) or in Accessible mode which is the 508-compliant mode. You can enable or disable these views via the portlet preferences. When both modes are enabled, users see a tabbed page. You can control the tab titles through preference definitions.

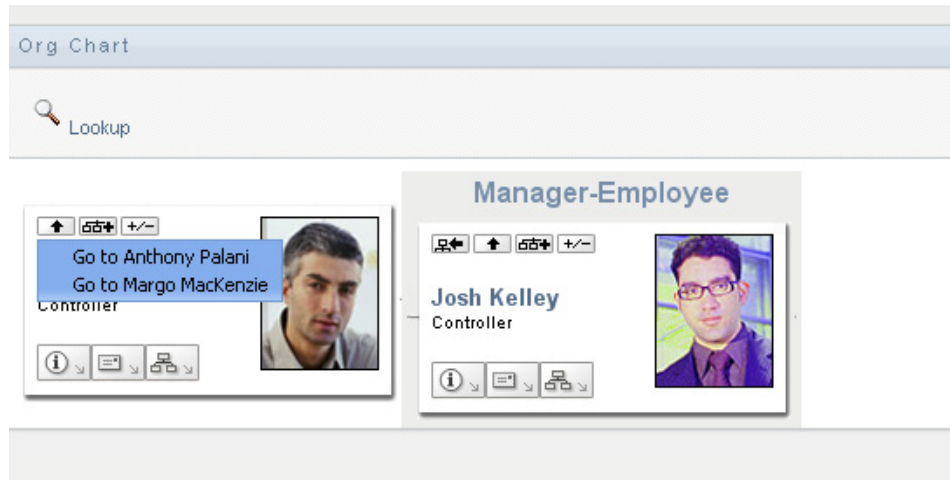
Users are able to display multiple relationships in one org chart as long as the relationships share the source entity. For example, [Figure 13-3](#) shows the org chart with both manager-employees, and users-groups for the root entity.

**Figure 13-3** Org Chart Displaying Multiple Relationships



If the manager attribute is multi-valued, the org chart automatically allows users to choose which manager's org chart to display, as shown in [Figure 13-4](#) on page 242.

**Figure 13-4** *Displaying Multi-valued Manager Attributes*



## User Images

By default, the org chart HTML layout for the User object includes the User Photo attribute. However, if your Identity Vault does not include this attribute or it is not populated, the org chart ignores this attribute at runtime. If you store your photos in a different location, you can configure the org chart to display those photos instead.

For more information, see [Section 13.2.3, “Dynamically Loading Images,” on page 263](#).

## 13.2 Configuring the Org Chart Portlet

To configure the Org Chart portlet, complete the steps in [Table 13-1](#).

**Table 13-1** *Org Chart Portlet: Configuration Steps*

Step	Task	Description
1	Define the relationship that you want to display.	You can use one of the predefined relationships that are installed with the Identity Manager User Application, or you can create your own.  For more information about defining a relationship, see <a href="#">Section 1.2.2, “Directory Abstraction Layer,” on page 24</a> .
2	Verify that the entities and attributes that you want to use in the relationship are available in the directory abstraction layer.	For more information about defining a relationship, see <a href="#">Section 13.2.1, “Directory Abstraction Layer Setup,” on page 243</a> .
3	Determine where you want to display this relationship.	Do you want to create a new page for launching the org chart? Or, do you want to launch it from the Detail portlet or from another org chart?  For more information about creating pages and adding portlets to those pages, see <a href="#">Chapter 6, “Page Administration,” on page 139</a> .

Step	Task	Description
4	Set preferences for the portlet.	<p>Preferences let you define:</p> <ul style="list-style-type: none"> <li>◆ Which attributes to display.</li> <li>◆ How to display them (their HTML layout).</li> </ul> <p>For more information, see <a href="#">Section 13.2.2, “Setting Preferences,”</a> on page 243.</p>
5	Test.	Test the relationship definitions and layout.
6	Set eDirectory™ rights and establish any indexes needed to enhance performance.	<p><b>Effective rights.</b> To display attributes defined by the portlet, users must have Read rights to the attributes.</p> <p><b>Performance enhancement.</b> The performance of the org chart display can be enhanced by adding an eDirectory value index to the relationship’s target attribute because the target attribute is used to do the LDAP search.</p>

## 13.2.1 Directory Abstraction Layer Setup

The entities and attributes displayed within an Org Chart must be defined in the directory abstraction layer. [Table 13-2 on page 243](#) shows the attributes and properties that you must set for each entity and attribute displayed in an org chart.

**Table 13-2** *Org Chart Portlet: Entity and Attribute Settings*

Definition Type	Setting	Value
entity	view	Selected (true)
attribute	read	Selected (true)
	search	Selected (true)

**Lookup Link requirements.** *Lookup Link* allows users to navigate the org chart by performing searches for other objects of the same type as the Source Entity key. The Lookup Link requires that the source entity key have at least one attribute with the *require* and *search* access properties set to true (selected in the directory abstraction layer editor). If not, the lookup link’s Object Lookup dialog cannot be populated and is empty when displayed.

For more information on entity and attribute configuration, see [Section 1.2.2, “Directory Abstraction Layer,”](#) on page 24.

## 13.2.2 Setting Preferences

You can define preferences for the relationships, the presentation (such as attributes and their order) and general display preferences. For more information, see:

- ◆ [“Org Chart General Preferences”](#) on page 244
- ◆ [“Org Chart Data/Relationship Preferences”](#) on page 250

- ◆ “Org Chart Presentation Layout Preferences” on page 253

## Org Chart General Preferences

This category includes the preferences on the main preferences page and excludes the custom preferences. The preference page is shown in [Figure 13-5](#) and [Figure 13-6](#).

**Figure 13-5** Org Chart Preferences

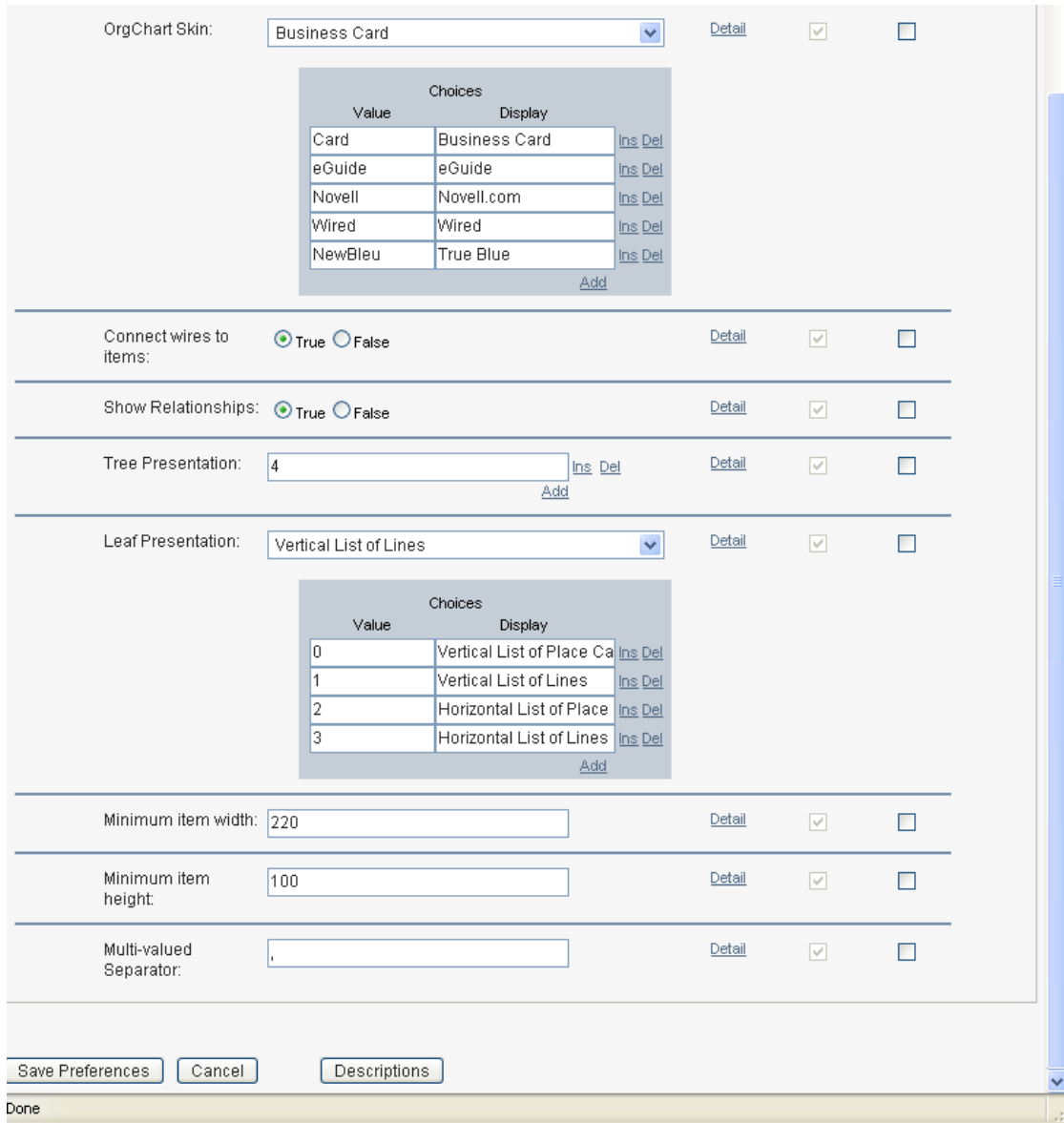
Modify Content Preferences for this Registration instance (Org Chart)

Entity Org Chart

Preference	Preference Value		Required	Read only									
Data:	<a href="#">View/Edit Custom Preference</a>		<input checked="" type="checkbox"/>	<input type="checkbox"/>									
Enable HTML Pane:	<input checked="" type="radio"/> True <input type="radio"/> False	<a href="#">Detail</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>									
HTML Pane Title:	<input type="text" value="Standard View"/>	<a href="#">Detail</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>									
Enable Accessible Pane:	<input type="radio"/> True <input checked="" type="radio"/> False	<a href="#">Detail</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>									
Accessible Pane Title:	<input type="text" value="Accessible View"/>	<a href="#">Detail</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>									
Default Pane:	<input type="text" value="HTML Pane"/> <input type="button" value="v"/>	<a href="#">Detail</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>									
<div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin: 5px auto;"> <p style="text-align: center;">Choices</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Value</th> <th style="width: 40%;">Display</th> <th style="width: 30%;"></th> </tr> </thead> <tbody> <tr> <td>HTML</td> <td>HTML Pane</td> <td style="text-align: right;"><a href="#">Ins Del</a></td> </tr> <tr> <td>508</td> <td>Accessible Pane</td> <td style="text-align: right;"><a href="#">Ins Del</a></td> </tr> </tbody> </table> <p style="text-align: right;"><a href="#">Add</a></p> </div>					Value	Display		HTML	HTML Pane	<a href="#">Ins Del</a>	508	Accessible Pane	<a href="#">Ins Del</a>
Value	Display												
HTML	HTML Pane	<a href="#">Ins Del</a>											
508	Accessible Pane	<a href="#">Ins Del</a>											
Detail portlet name:	<input type="text" value="DetailPortlet"/>	<a href="#">Detail</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>									
Presentation Layouts:	<a href="#">View/Edit Custom Preference</a>		<input checked="" type="checkbox"/>	<input type="checkbox"/>									
Maximum Depth:	<input type="text" value="10"/>	<a href="#">Detail</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>									
Maximum initial depth:	<input type="text" value="3"/>	<a href="#">Detail</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>									
Show Scrollbars:	<input type="radio"/> True <input checked="" type="radio"/> False	<a href="#">Detail</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>									



**Figure 13-6** *Org Chart Preferences (continued)*



**Table 13-3** *Org Chart Portlet: Preferences*

Preference	What to Do
Data	Click <i>View/Edit Custom Preferences</i> to access the preferences that define the org chart's relationships. See " <a href="#">Org Chart Data/Relationship Preferences</a> " on page 250.
Enable HTML Pane	Click <i>True</i> to enable the HTML display of related objects. This is the default display. It displays the related objects as business cards.
HTML Pane Title	Type the text to display in the <i>HTML Pane</i> tab. If you enable the display of the <i>Accessible Pane</i> and the <i>HTML Pane</i> , this text is displayed as the title of the tab containing the HTML display.

Preference	What to Do
Enable Accessible Pane	Click <i>True</i> to enable the Accessible display of related objects. The Accessible pane displays the objects and links as text strings. This display provides 508-compliant access.
Accessible Pane Title	Type the text to display in the Accessible Pane tab. If the HTML Pane and the Accessible Pane are enabled, this text is displayed as the title of the tab containing the Accessible display.
Default Pane	Choose the pane to display as the default when a user clicks the <i>Organization Chart</i> action. It must be enabled.
Detail Portlet Name	Specify the name of the Detail portlet instance to launch when the user clicks the <i>Show Info</i> link.
Presentation Layouts	Click <i>View/Edit Custom Preferences</i> to access the layout preferences. They are described in " <a href="#">Org Chart Presentation Layout Preferences</a> " on <a href="#">page 253</a> .
Maximum Depth	Defines the maximum depth the user can drill down in an org chart. This is not the same as the ability to navigate through an org chart, which is restricted by effective rights.
Maximum Initial Depth	Defines the depth of the initial display.
Show Scrollbars	Click <i>True</i> to enable scrollbars.

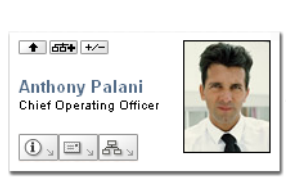
---

**Preference****What to Do**

---

OrgChart Skin

Specify one of the skins for the org chart listed below:

*Business Card:**eGuide:**Novell.com:**Wired:**True Blue:*

Connect wires to items

Specifies whether the org chart cards are connected by wires. False means not connected.

---

**Preference****What to Do**

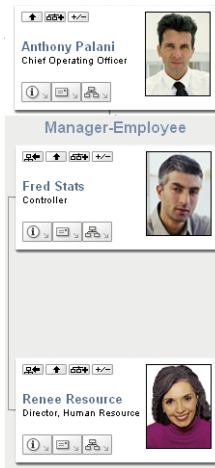
---

## Tree Presentation

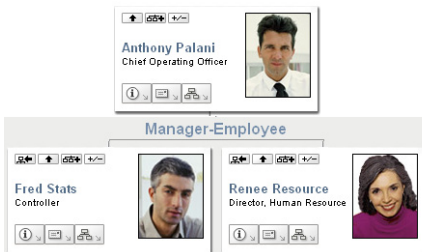
Defines the Org Chart orientation (horizontal or vertical) and whether the chart displays as business cards or text. Values range between 0 and 5. Values of 0, 2, and 4 display business cards. Values of 1, 3, and 5 display text.

Tree Presentation Values of 0, 2, and 4 display business cards.

Specify 0, to place a card above a vertical list of items.



Specify 2, to place a business card above a horizontal list of items.



Specify 4, to place card before a vertical list of items

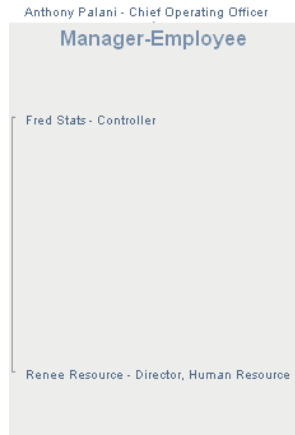


---

**Preference****What to Do**

---

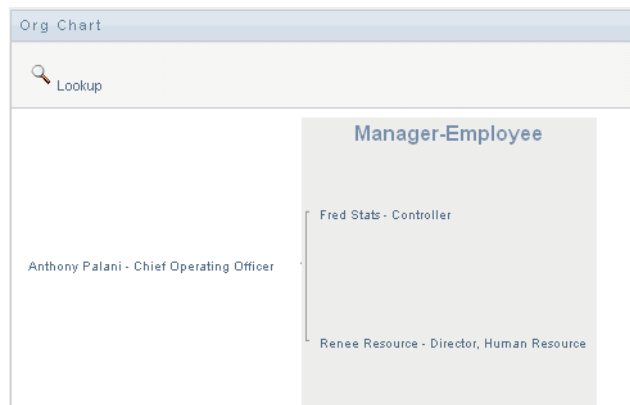
Tree Presentation Values of 1, 3, and 5 display the org chart using lines. Specify 1, to display a line above a vertical list of items



Specify 3, to display a line above a horizontal list of items



Specify 5, to display a line before a vertical list of items

**Leaf Presentation**

Defines the appearance (orientation and distribution) of the org chart's entity at the maximum depth allowed. For example, if you defined the maximum depth as 10, the leaf presentation controls the display of the entity at the 10th level of the org chart. If you define the maximum depth as 1, this controls the layout of the entity at the 1st level.

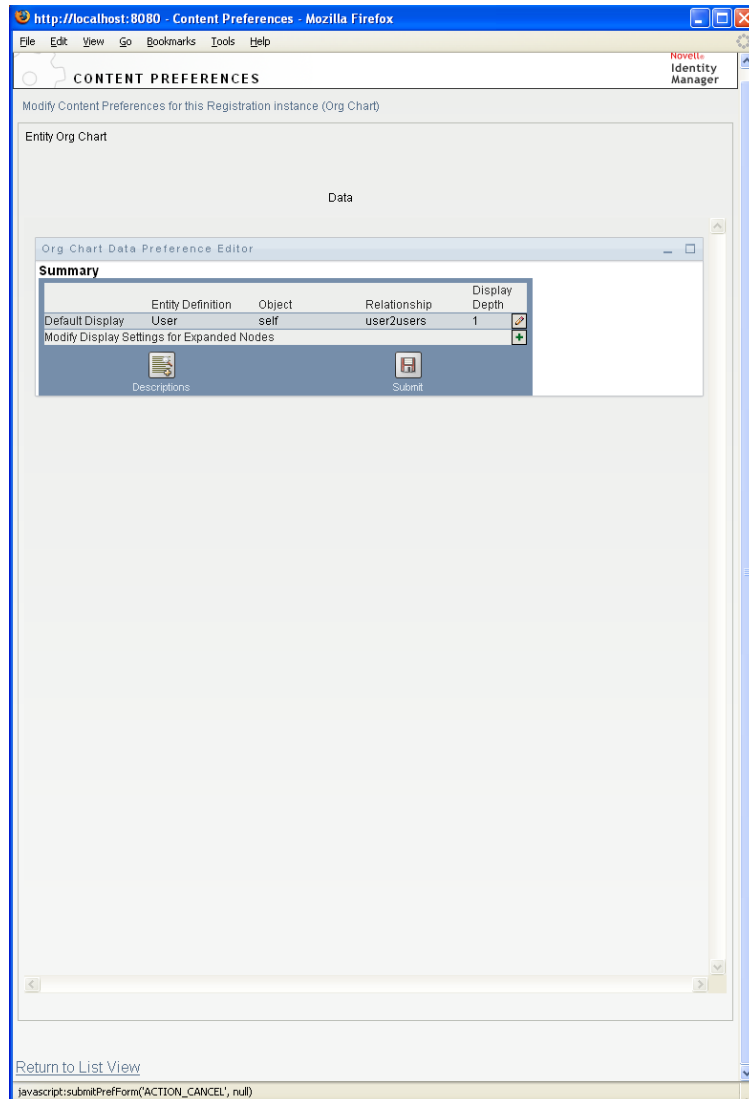
You can display any Leaf Presentation within any Tree Presentation.



Preference	What to Do
Minimum item width	The minimum width (in pixels) of the business card display (in HTML mode). This value should equal to round ('item min height' * 1.618).
Minimum item height	The minimum height (in pixels) of the business card display. This value should equal to round ('item min width' / 1.618).
Separator for multi-valued attributes	The character used as a separator for attributes with more than one value.

## Org Chart Data/Relationship Preferences


You access the Org Chart relationship preferences by clicking the *View/Edit Custom Preferences* link of the *Data* preference. The initial preference page is shown below. It displays the default relationship used in the default Org Chart.

**Figure 13-7** Org Chart Data/Relationship Preferences

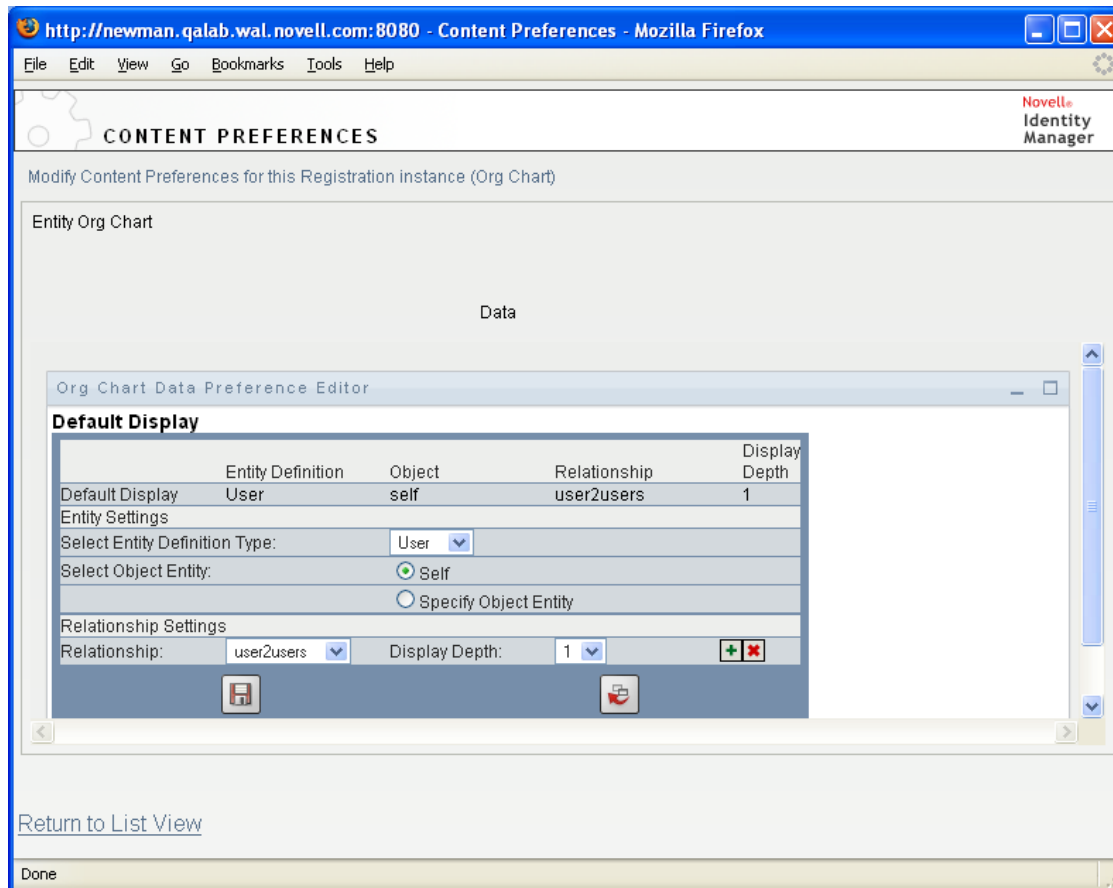


To edit the entity and relationships available to the org chart, click edit button . See [Editing Data/Relationship Preferences \(page 251\)](#). To modify the display settings for the expanded nodes, click the modify button . See [Modifying Expanded Nodes \(page 252\)](#).

## Editing Data/Relationship Preferences

This set of preferences affects the initial display of the org chart and the relationships displayed when users click the expand/collapse relationship button. . You can define any number of relationship levels.


**Figure 13-8** Edit Default Data/Relationship Preferences



**Table 13-4** Org Chart Data/Relationship Preference

Preference	Description
<i>Entity Settings</i>	<p>The <i>Select Entity Definition Type</i> preference lets you choose the entity whose relationships you want to display. Only entities defined in the directory abstraction layer are available in this drop-down list.</p> <p>The <i>Select Object Entity</i> preference lets you choose the chart's root entity. Click the object selector button to search for an object. If the selected entity type definition is a user, then you can select Self instead of an object. Choosing Self means that the org chart root is the logged-on user.</p>

Preference	Description
<i>Relationship Settings</i>	<p>The settings in this category let you specify the details about the relationships displayed by the default chart.</p> <p>The <i>Relationship</i> preference lets you choose a relationship from the drop-down list. Only the relationships that make sense for the selected entity are included in this list.</p> <p>The <i>Display Depth</i> preference controls how many levels of the relationship are displayed. Only display depths allowed for the selected relationship are displayed.</p>

The expanded node preferences are the same, except that they control the relationships displayed after the user clicks the expand/collapse button  .

### Modifying Expanded Nodes


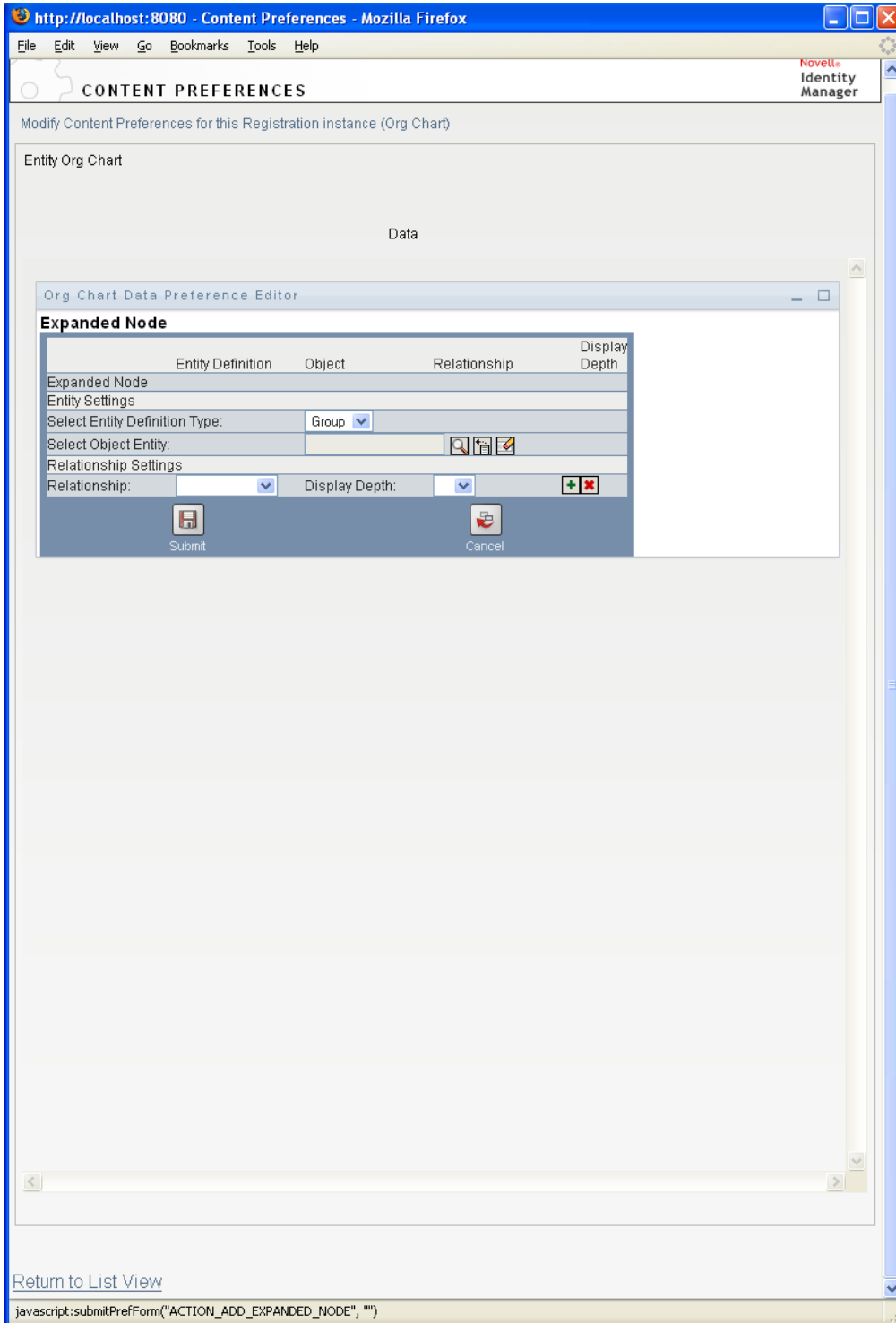
*Expanded nodes* preferences let you control what is displayed when the user clicks the expand/collapse button of the org chart.  .



Figure 13-9 Preferences for Modifying Expanded Nodes



## Org Chart Presentation Layout Preferences

The *Org Chart Presentation Layout* preferences let you define the HTML layout for the display of the org chart entries. You can use the HTML editor available from the preferences sheet, or you can

use the HTML editor of your choice for more precise editing. See [“Using an External HTML Editor” on page 263](#).

The HTML editor, available from the preferences page, provides a WYSIWYG interface for defining the layout of the leaves of the org chart. It provides the typical features of an HTML editor for defining text formatting and lists, specifying anchors and images, and so on. Use the *Keywords* drop-down list to place attributes, commands, and navigation URLs within the layout area. When you choose a keyword from the drop-down list, it is inserted with the proper syntax, but you can also add HTML within the layout area.

Figure 13-10 Org Chart Presentation Layouts Preferences

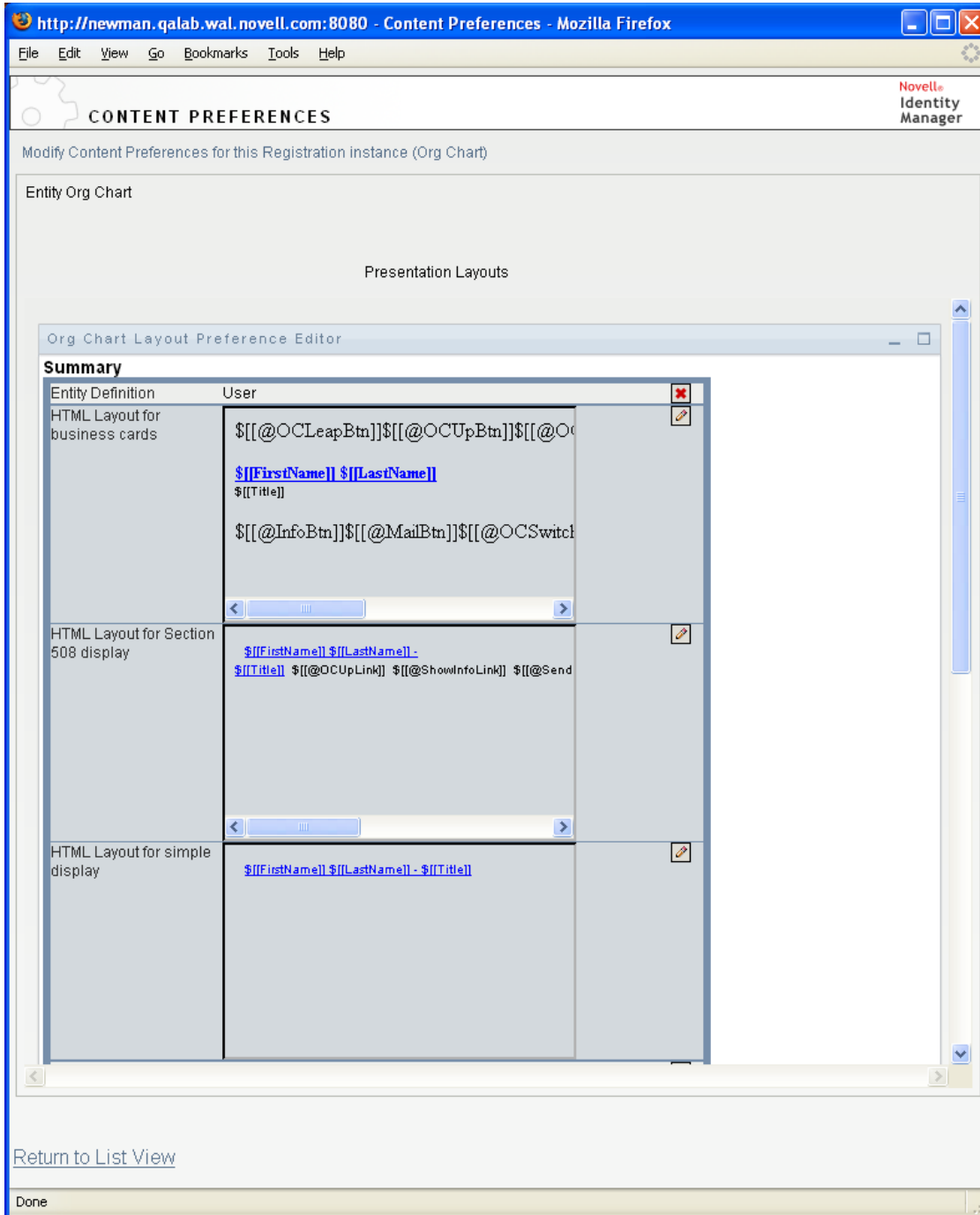


Table 13-5 HTML Layout Definitions

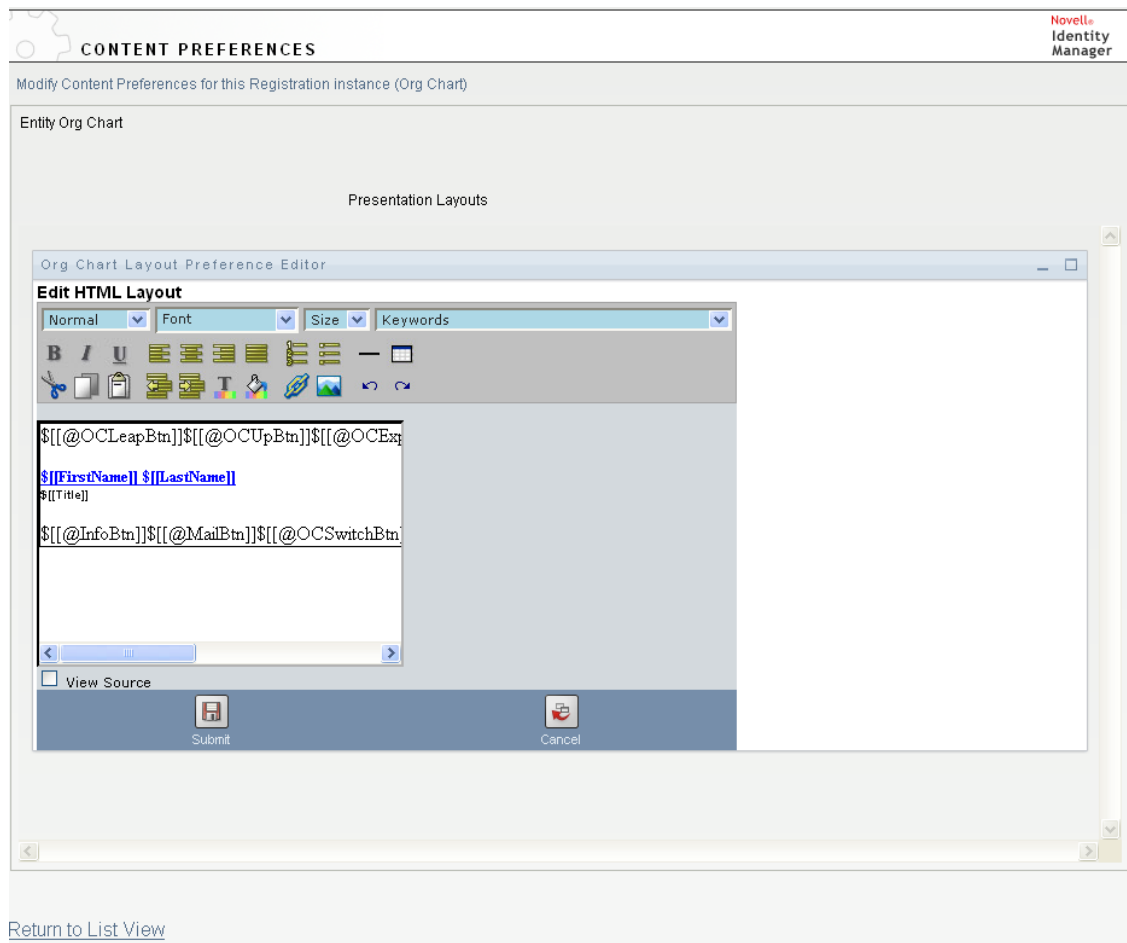
Layout Section	Description
HTML Layout Section Business Cards	The default layout. The layout displayed when Tree Presentation is set to 0, 2, or 4.

Layout Section	Description
HTML Layout Section for Section 508 Display	The default layout for the Accessible Pane.
HTML Layout Section for Simple Layout	The layout when the Tree Presentation is set to 1, 3, or 5.

## Using the HTML Editor

You access the HTML editor by clicking the *Edit* button. The HTML editor is shown in [Figure 13-11](#).

**Figure 13-11** HTML Editor



## HTML Editor Features and Keywords

[Table 13-6](#) describes the HTML editor features and *Keywords* drop-down list. To save your layouts, click *Submit*.

**Table 13-6** HTML Editor Features

Feature	Tip
Insert Link button	<p data-bbox="443 272 551 298">In Mozilla:</p> <ol data-bbox="463 324 1059 435" style="list-style-type: none"><li data-bbox="463 324 1059 350">1. Select the text you want to link, then click <i>Insert Link</i>.</li><li data-bbox="463 364 883 391">2. Type the URL and click <i>Create Link</i>.</li><li data-bbox="463 405 733 431">3. Save the preferences.</li></ol> <p data-bbox="443 457 498 483">In IE:</p> <ol data-bbox="463 510 1213 691" style="list-style-type: none"><li data-bbox="463 510 674 536">1. Click <i>Insert Link</i>.</li><li data-bbox="463 550 883 576">2. Type the URL in the pop-up window.</li><li data-bbox="463 590 1213 651">3. Select the text you want to link, then click <i>Create Link</i> in the pop-up window.</li><li data-bbox="463 665 733 691">4. Save the preferences.</li></ol> <hr/> <p data-bbox="443 727 1244 838"><b>NOTE:</b> If your image or URL is located in the upper-left quadrant of the HTML editor, the pop-up window overlaps it. Because the pop-up cannot be moved, you must create the text you want elsewhere in the editor and cut and paste it to the correct location.</p>
	Add Image button

Feature	Tip
Keyword drop-down List: Attributes	<p>The set of attributes available for this entity. When designing your layout, you can use the Keywords drop-down list to insert variables that are replaced at runtime with specific attribute values. You can also type the attributes directly in the editor using the following syntax:</p> <pre data-bbox="571 374 760 401">\$ [ [keyword] ]</pre> <p>where <i>keyword</i> is the value of an entity attribute such as <code>LastName</code>.</p> <p>You can concatenate attributes using this syntax:</p> <pre data-bbox="571 546 887 572">\$ [ [keyword+keyword] ]</pre> <pre data-bbox="571 616 936 643">\$ [ [FirstName+LastName] ]</pre> <p>For example, you can concatenate as many attributes as you want and can also include quoted strings like this:</p> <pre data-bbox="571 768 1110 794">\$ [ [keyword+"sample text"+keyword] ]</pre> <p>This renders the values of the keywords and the quoted text.</p> <hr/> <p><b>NOTE:</b> When a keyword is mistyped in a layout, it is rendered as-is in the org chart (including the <code>\$([])</code>).</p>
Keyword drop-down List: Commands	<p>These commands allow the Org Chart portlet to display the links or buttons for the built-in links described in <a href="#">"Built-in links."</a> on page 238.</p> <p>The keyword commands generate:</p> <ul style="list-style-type: none"> <li>◆ Navigation URLs. See <a href="#">Table 13-7, "Org Chart Keywords: Built-in Action URLs,"</a> on page 259.</li> <li>◆ Action Links. See <a href="#">Table 13-8, "Org Chart Keywords: Built-in Action Links,"</a> on page 261.</li> <li>◆ Navigation Buttons. <a href="#">Table 13-9, "Org Chart Buttons Built-in Action Buttons,"</a> on page 262.</li> </ul> <p>There is a set of commands that generate buttons for the HTML display and a set of commands that generate links for the accessible view. The links do not display with link attributes. See <a href="#">Table 13-8 on page 261.</a></p>

**Table 13-7** *Org Chart Keywords: Built-in Action URLs*

Menu Item	Source Created	Usage
<i>OrgChart Navigation Click (Link)</i>	@OCNavClick	<p>Use this keyword for an onClick event. It makes the clicked entity the new org chart root.</p> <p>To use this keyword:</p> <ol style="list-style-type: none"><li>1. Click <i>View Source</i>.</li><li>2. Type the @NavClick keyword using this syntax:</li></ol> <pre>&lt;A href="javascript:return false;" onClick="\$ [ [@NavClick] ] "&gt;\$ [ [SomeAttribute] ]&lt;/A&gt;</pre> <p>where <i>SomeAttribute</i> is an entity attribute that becomes a clickable link.</p> <p>The "javascript:return false;" is required. Omitting it will cause an error.</p>
<i>OrgChart Up Navigation (Link)</i>	@OCUpClick	<p>Use this keyword for an onClick event. It navigates to the current entity's parent. If there is more than one parent, it displays a popup menu with selectable options.</p> <p>To use this keyword, you must:</p> <ol style="list-style-type: none"><li>1. Click <i>View Source</i>.</li><li>2. Type @OCUpClick using this syntax:</li></ol> <pre>&lt;A href="javascript:return false;" onClick="\$ [ [@OCUpClick] ] "&gt;\$ [ [SomeAttribute] ]&lt;/A&gt;</pre> <p>where <i>SomeAttribute</i> is an entity attribute that becomes a clickable link.</p> <p>The "javascript:return false;" is required. Omitting it will cause an error.</p>

Menu Item	Source Created	Usage
	@OCExpCollClick	<p>Use this keyword on an onClick event. It allows the user to Expand/Collapse existing relationships from the clicked entity. To use this keyword, you must:</p> <ol style="list-style-type: none"> <li>1. Click <i>View Source</i>.</li> <li>2. Type @OCExpCollClick using this syntax:</li> </ol> <pre data-bbox="883 491 1361 612">&lt;A href="javascript:return false;" onClick="\$ [ [@OCExpCollClick] ] " &gt;\$ [ [SomeAttribute] ] &lt;/A&gt;</pre> <p>where <i>SomeAttribute</i> is an entity attribute that becomes a clickable link.</p> <p>The "javascript:return false;" is required. Omitting it will cause an error.</p>



Menu Item	Source Created	Usage
<i>OrgChart Navigation Url (Link)</i>	@OCNavURL	<p>Specify a URL or entity attribute to display as a link. When clicked, the org chart displays with the clicked entity becoming the root node. This is only valid when the Source and Target entities are the same object type. For example, in the Manager-Employee relationship, both are users.</p> <p>Use this keyword as follows:</p> <ol style="list-style-type: none"> <li>1. Click <i>View Source</i>.</li> <li>2. Type the @NavUrl keyword using this syntax:</li> </ol> <pre>&lt;a href="javascript:\$ [[@NavUrl]] " &gt;someText&lt;/a&gt;</pre> <p>where <i>someText</i> is the text or an entity attribute. In the following example, <i>Click here</i> becomes a clickable link:</p> <pre>&lt;a href="javascript:\$ [[@NavUrl]] " &gt;Click here&lt;/a&gt;</pre> <p>Here, the <i>FirstName</i> attribute is the clickable link:</p> <pre>&lt;a href="javascript:\$ [[@NavUrl]] " &gt;\$ [[FirstName]]&lt;/a&gt;</pre> <p>With Internet Explorer, do not use the following syntax. IE adds a context before the @NavURL; it will not display correctly.</p> <pre>&lt;a href="\$ [[@NavUrl]] "&gt;someText&lt;/ a&gt;</pre>

The keywords in [Table 13-8](#) generate localized text links for use on the HTML pane.





**Table 13-8** *Org Chart Keywords: Built-in Action Links*





Menu Item	Source Created	Renders as a Localized Link of This Text
<i>Expand/Collapse Current Relationship (Link)</i>	@OCLazyExpCollLink	<p><i>Expand/Collapse current relationship</i></p> <p>Finds the first reentrant relationship and collapses it.</p>

Menu Item	Source Created	Renders as a Localized Link of This Text
<i>Org Chart Up Button (Link)</i>	@OCUpLink	<i>Go up a level</i>  Goes to the current entity's parent. If there is more than one parent, it displays a popup that allows the user to select the parent.
<i>Show Info (Link)</i>	@ShowInfoLink	<i>Show info</i>  Launches the Detail portlet for the selected entity.
<i>Email Info (Link):</i>	@SendInfoLink	<i>Email Info</i>  Launches an e-mail that contains the clicked entity's information.
<i>Email to team (Link)</i>	@MailTeamLink	<i>Email to team</i>  Launches an e-mail to the selected entity's team.

The keywords in [Table 13-9](#) generate image buttons for use with the HTML pane.

**Table 13-9** *Org Chart Buttons Built-in Action Buttons*

Menu Item	Syntax	Renders As
<i>OrgChart Leap (Action Button)</i>	@OCLeapBtn	  The button makes the clicked entity the new root.
<i>OrgChart Up Button (Action Button)</i>	@OCUpButton	  The button goes to the current entity's parent. If there is more than one parent, it displays a popup that allows the user to select the parent.
<i>Choose relationship to Expand/Collapse (Action Button)</i>	@OCExpColBtn	  This buttons expands/collapses existing relationships from the clicked entity.
<i>Expand/Collapse current relationship (Action Button)</i>	@OCLazyExpColBtn	  This button finds the first reentrant relationship and collapses it.

Menu Item	Syntax	Renders As
<i>OrgChart (Action Button)</i>	@OCSwitchBtn	 <p>This buttons shows the available relationships from the clicked entity. When the user picks one, the clicked entity becomes the new root and the selected relationship is expanded.</p>
<i>Info (Action Button)</i>	@InfoBtn	 <p>Displays the detail portlet for the selected entity.</p>
<i>IM (Action Button)</i>	@IMBtn	 <p>Allows the user to send instant messages and add contacts. The entity must include the appropriate attributes or the org chart displays a message indicating that no data is available.</p>
<i>Mail (Action Button)</i>	@MailBtn	 <p>Launches an e-mail that contains the clicked entity's information.</p>

## Using an External HTML Editor

Use the following process to work in an external HTML editor:

- 1 Create the HTML source for the entity attributes, commands, and keywords using *HTML Layout Editor*, available in the preferences.
- 2 Copy the HTML source to the editor of your choice.
- 3 Make the changes that you want.
- 4 Copy the HTML source back to the HTML Layout Editor preference when you have finished editing it.

### 13.2.3 Dynamically Loading Images

To display images that are stored in your Identity Vault (such as user photos), you can add the attribute name to the business card. For example, adding the User Photo attribute to the business card layout displays the user's photo.

If you store images outside the Identity Vault, you need to use the IMG: tag within the View Source mode of the HTML Editor as follows:

- 1 Go to the Org Chart portlet's preferences and access the HTML Editor.
- 2 Click *View Source*.
- 3 Use the IMG: tag to combine a location, an attribute key, and a file extension using a syntax like this:

```
$$[[IMG:"URL" + attribute-key-name + "fileextension"]]
```

The following example shows the syntax you would use if you stored employee photos as JPG images by Last Name in the /images subdirectory of your application server:

```
$$[[IMG:"http://myhost:8080/images/"+LastName+".jpg"]]
```

At runtime, the org chart concatenates the URL with the LastName attribute and the file extension .jpg.

The HTML Editor supports a flexible syntax. It supports any combination of text and attributes so that the syntax is:

```
$$[[IMG:"some text" + attribute-key-name + ...]]
```

## 13.3 Configuring Org Chart for Guest Access

To configure the org chart portlet for anonymous access you must modify settings in the Org Chart preferences and also in the User Application WAR file. The steps are described in:

- ♦ [Section 13.3.1, “Modifying the Org Chart Preferences,” on page 264](#)
- ♦ [Section 13.3.2, “Modifying the User Application WAR,” on page 264](#)

### 13.3.1 Modifying the Org Chart Preferences

- 1 Go to *Administration > Portlet Admin*.
- 2 Register and name a new instance of the OrgChartPortlet, for example, Public OrgChart.
- 3 Select the new instance, then go to the *Settings* tab.
- 4 Set *Requires Authentication* to false, then click *Save Settings*.
- 5 Go to the *Preferences* tab and modify the preferences as needed.
- 6 Reference this instance of Org Chart from the Create or Detail portlets defined for anonymous access.

### 13.3.2 Modifying the User Application WAR

The org chart portlet relies on controls defined in the User Application WAR's `UIControlRegistry.xml` file. By default, these controls require authentication. To allow guest access to the org chart portlet, you must set the authentication requirement to false in the definitions for the `portal` and `vdm` services in the `WEB-INF\UIControlRegistry.xml` file. Perform these instructions in a test environment before attempting them on a working version of the User Application. Make sure you backup your files before you begin.

To change the authentication requirements for the `portal` and `vdm` service definitions:

- 1 Open the User Application WAR and extract the contents.
- 2 Locate the `UIControlRegistry.xml` file in the WAR's `WEB-INF` directory.
- 3 In the `UIControlRegistry.xml` file, locate the service definition for the `portal` service. It is shown below:

```
<service resultType="json" authenticated="true" config="false">
```

```
<key>portal</key>
<classname>com.novell.srvprv.impl.servlet.service.PortalBridge
  </classname>
</service>
```

**4** Change the value of *authenticated* to *false*.

**5** In the `UIControlRegistry.xml` file, locate the service definition for the `vdm` service. It is shown below:

```
<service resultType="json" authenticated="false" config="false">
  <key>vdm</key>
  <classname>com.novell.srvprv.impl.servlet.service.VDMBridge
    </classname>
</service>
```

**6** Change the value of *authenticated* to *false*.

**7** Save your changes.

**8** Repackage the User Application WAR file.

**9** Deploy the updated WAR in your test environment.



# Resource Request Portlet

This section describes how to set up and customize the Resource Request portlet for use with the User Application. It includes these topics:

- ♦ [Section 14.1, “About the Resource Request Portlet,” on page 267](#)
- ♦ [Section 14.2, “Configuring the Resource Request Portlet,” on page 267](#)
- ♦ [Section 14.2.1, “Setting Preferences,” on page 268](#)

## 14.1 About the Resource Request Portlet

The Resource Request portlet allows the guest or anonymous user to execute resource requests. For example, you could set up a resource request that allows a user to register (which adds an Identity Vault) upon a completed and approved workflow.

## 14.2 Configuring the Resource Request Portlet

Follow these steps to configure the Resource Request portlet:

**Table 14-1** *Resource Request Configuration Steps*

Step	Task	Description
1	Define the anonymous user for your system.	Are you using the LDAP guest, or a special user defined in the Identity Vault? What privileges will this user need in order to execute the workflow? Does the workflow have the correct property attributes set?  For more information about the anonymous user, see <a href="#">Chapter 1, “Introduction to the User Application,” on page 21</a> .
2	Specify the resource request to be executed from this portlet.	For more information, see <a href="#">Section 14.2.1, “Setting Preferences,” on page 268</a> .
3	Create a new page to contain the resource request. The security on this page should allow guest or anonymous access.	For more information, see <a href="#">Section 6.3, “Creating and Maintaining Shared Pages,” on page 155</a> .  After you create the new shared page, make sure that you specify the Guest Category and deselect the page’s <i>View permission Set to Admin only</i> .
4	Test the resource request as the anonymous user.	Verify that the workflow completes as expected.

---

**TIP:** When you create the workflows to use with the Resource Request portlet and you define the To token in the e-mail notification as `_default_`, the addressee expression must be an IDVault expression.

---

## 14.2.1 Setting Preferences

Preferences include:

**Table 14-2** *Resource Request Portlet: General and Custom Preferences*

Preference	Description
Resource Request	Click <i>View/Edit Custom Preference</i> to access the list of resource requests to add to the page. This list is populated with any resource requests deployed to the User Application driver.  Choose a single resource request. The list is populated with the resource requests that are deployed to the User Application driver.



# Search List Portlet Reference

This section describes how to set up and customize the Search List portlet for use with the Identity Manager User Application. Topics include:

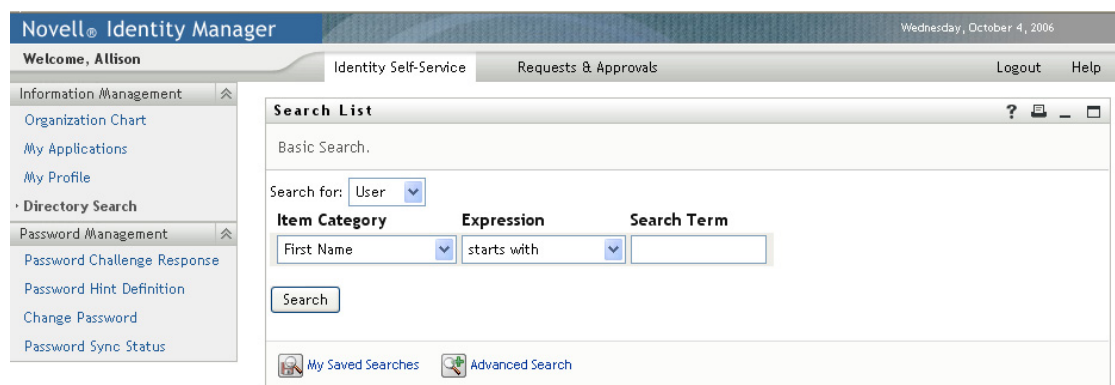
- ◆ [Section 15.1, “About Search List,” on page 269](#)
- ◆ [Section 15.2, “Configuring the Search List portlet,” on page 273](#)
- ◆ [Section 15.2.2, “Setting Search List preferences,” on page 275](#)
- ◆ [Section 15.3, “Configuring Search List for Anonymous Access,” on page 280](#)

## 15.1 About Search List

The Search List portlet allows users to search and display the contents of the Identity Vault. It is the basis for the Directory Search action of the Identity Manager User Application *Identity Self-Service* tab. The Directory Search action is configured to allow users to search for users and groups, but you can modify it to change the scope of searchable objects and attributes.



[Figure 15-1 on page 269](#) shows how the Directory Search action allows users to define search criteria.

**Figure 15-1** Basic Search



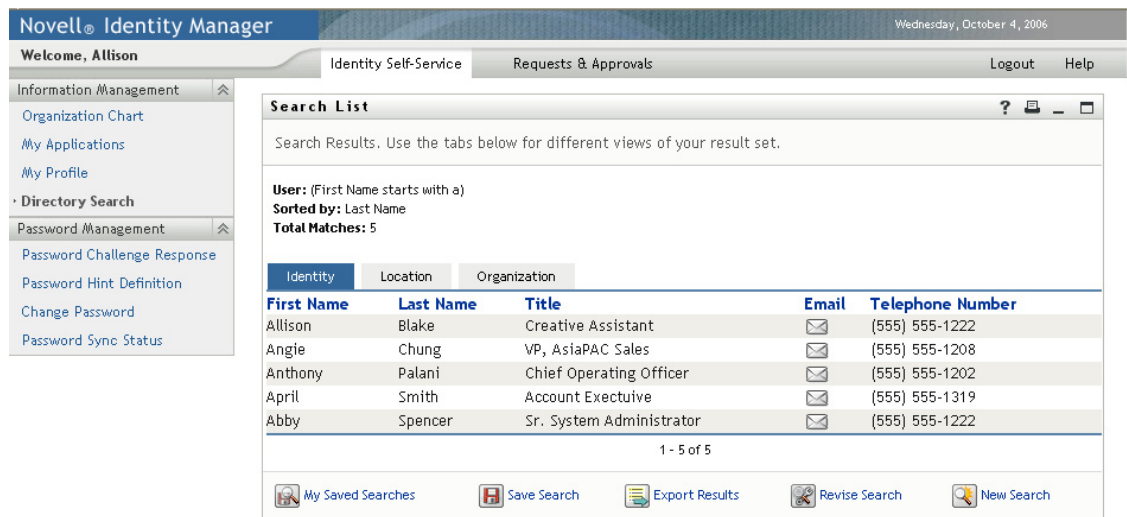
**Table 15-1** Directory Search Criteria

User Interface Element	Description
Search for	Users select the object type to search.
	For more information on defining the contents of this list, see <a href="#">Section 15.2.2, “Setting Search List preferences,” on page 275.</a>

User Interface Element	Description
With this criteria	<p>Users define the search criteria by selecting attributes and search operators from the drop-down list.</p> <p>When users select <i>Advanced Search</i>, they are able to specify multiple rows and multiple blocks of search criteria groupings that can be made inclusive (AND) or exclusive (OR).</p> <p>For more information on defining the searchable attributes, see <a href="#">“Setting Search List preferences” on page 275</a>.</p>
Search	<p>Runs the specified search criteria.</p> <p>For more information on defining the default search, see <a href="#">“Setting Search List preferences” on page 275</a>.</p>
My Saved Searches	<p>Allows the user to run, edit, or delete a previously saved search.</p>
 My Saved Searches	
Advanced Search	<p>Lets users add rows or blocks of search criteria, but in an advanced search, they are able to specify multiple rows and multiple blocks of search criteria groupings that can be made inclusive (AND) or exclusive (OR).</p> <p>For more information on defining the searchable attributes, see <a href="#">“Setting Search List preferences” on page 275</a>.</p>
 Advanced Search	

This example shows how the portlet displays (using sample data) after the search criteria *First name starts with A* is entered:

**Figure 15-2** Sample Search List Results



The screenshot shows the Novell Identity Manager interface. The main content area displays the 'Search List' portlet with the following information:






- User:** (First Name starts with a)
- Sorted by:** Last Name
- Total Matches:** 5

Identity	Location	Organization		
First Name	Last Name	Title	Email	Telephone Number
Allison	Blake	Creative Assistant	✉	(555) 555-1222
Angie	Chung	VP, AsiaPAC Sales	✉	(555) 555-1208
Anthony	Palani	Chief Operating Officer	✉	(555) 555-1202
April	Smith	Account Executive	✉	(555) 555-1319
Abby	Spencer	Sr. System Administrator	✉	(555) 555-1222

At the bottom of the portlet, there are navigation options: 1 - 5 of 5, My Saved Searches, Save Search, Export Results, Revise Search, and New Search.

You can configure the Search List portlet to use any of the features listed in [Table 15-2 on page 271](#).

**Table 15-2** Search List Portlet Features

User Interface Element	Description
<i>Identity, Location, Organization</i> tabs	Users click one of these tabs to see the results list displayed in different ways.  For more information on formats, see <a href="#">“About Results List Display Formats” on page 271</a> .
My Saved Searches  My Saved Searches	Allows users to select a previously saved search.
Save Search  Save Search	Allows users to save search criteria and rerun the saved searches as needed. The searches are saved to the currently logged on user’s <code>srvprvQueryList</code> attribute.
Export Results  Export Results	Lets users export the search results to a different format.
Revise Search  Revise Search	Lets users change the search criteria.
New Search  New Search	Lets users define a new search.

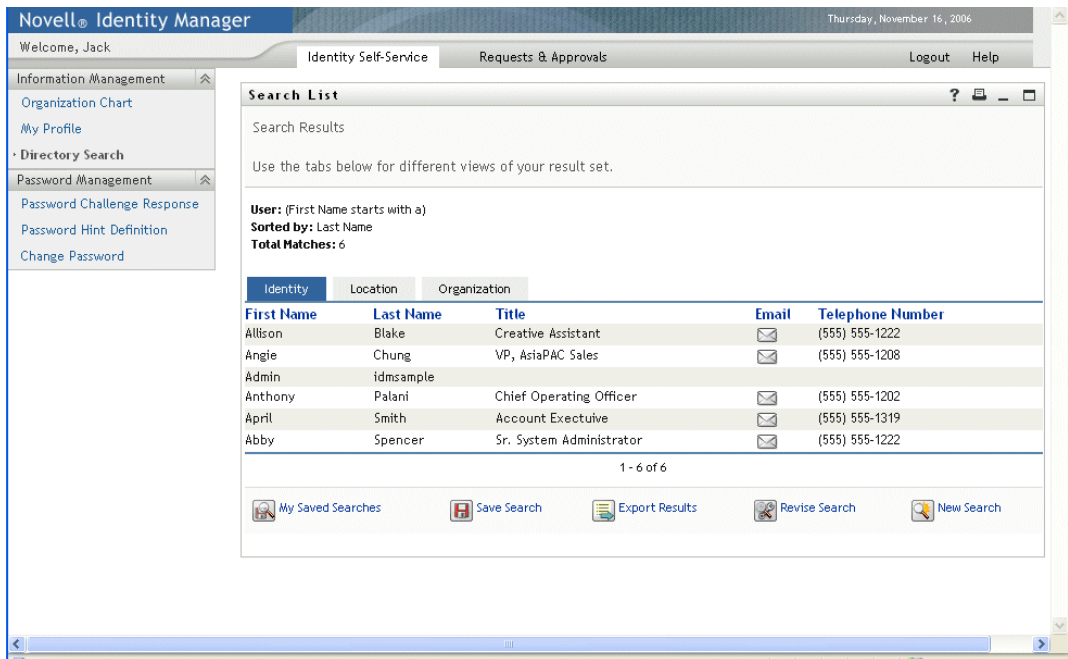
By default, Search List also allows users to:

- ◆ Print the search results
- ◆ Launch e-mail from the results list
- ◆ Launch the Detail portlet from the results list

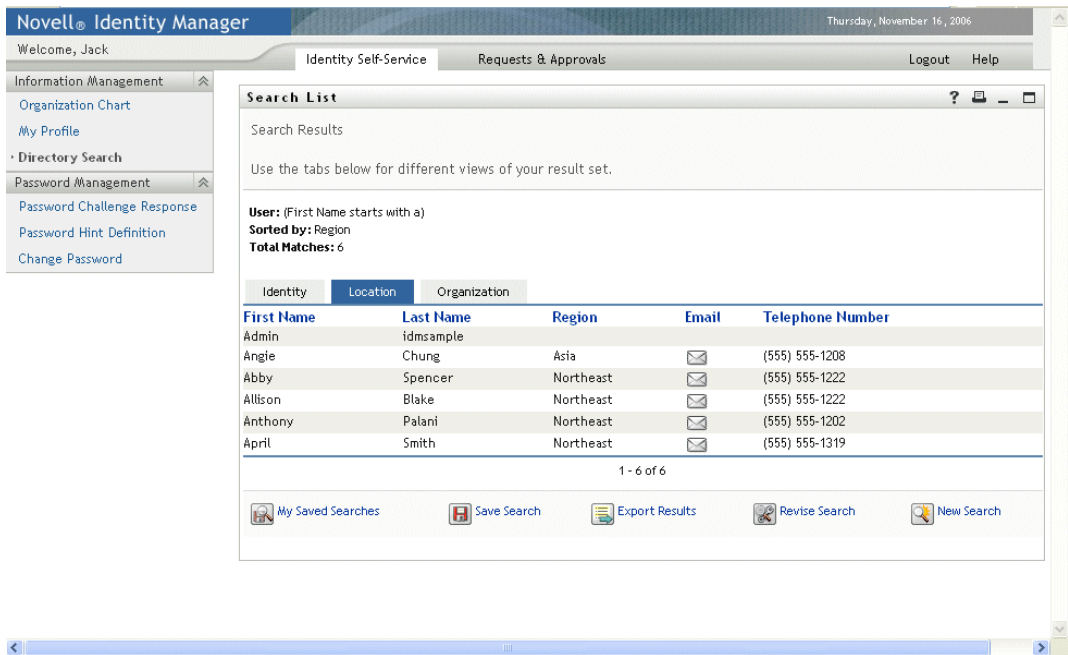
### 15.1.1 About Results List Display Formats

You can define how data that is returned from the Identity Vault search is displayed to users. The data can be organized in one or more of these page types:

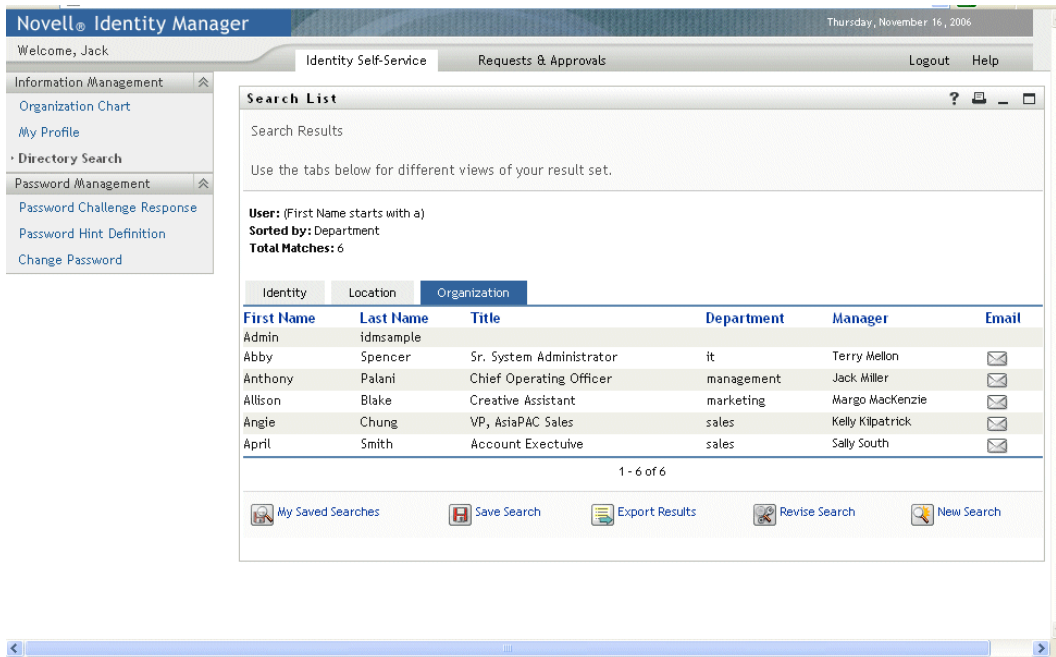
- ◆ Identity Pages typically include contact information, as shown here:



- ◆ Location Pages typically include location information, as shown here:



- ◆ Organization Pages typically include organization hierarchy information, as shown here:



You can define other result list formats using the portlet’s complex preferences. For example, if your Identity Vault schema includes information about employee skills, you can set up a results list to display this information.

Depending on how you configure the portlet, users are able to:

- ◆ Choose the types of Identity Vault objects to search (such as users and groups)
- ◆ Specify the criteria that they want to search (such as First name starts with, Last name includes, and so on)
- ◆ Choose the display format that they want to view the search results
- ◆ Change the sort order

## 15.2 Configuring the Search List portlet

To configure the Search List portlet, follow the steps in [Table 15-3](#).

**Table 15-3** Search List Portlet Configuration Steps

Step	Task	Description
1	Define: <ul style="list-style-type: none"> <li>◆ The entities and attributes you allow users to search.</li> <li>◆ How you display the results list.</li> </ul>	<p>You can use the predefined Directory Search action that gets installed with the Identity Manager User Application as-is. You can modify it, or you can create your own.</p> <p>For more information, see <a href="#">“Setting Search List preferences” on page 275</a>.</p>
2	Verify that the set of entities and attributes for searching are defined in the directory abstraction layer.	For more information, see <a href="#">Section 1.2.2, “Directory Abstraction Layer,” on page 24</a> .

Step	Task	Description
3	Determine how you want users to access the portlet.	Do you want users to launch this portlet from an existing or a new page?  For more information about pages, see <a href="#">Chapter 6, "Page Administration," on page 139</a> .
4	Set preferences for the portlet.	Preferences for the search list portlet let you define: <ul style="list-style-type: none"> <li>◆ The attributes displayed for each results list format.</li> <li>◆ The results list display format that a search produces.</li> <li>◆ The default sort order for the results list formats.</li> </ul> For more information, see <a href="#">Section 15.2.2, "Setting Search List preferences," on page 275</a> .
5	Test your settings.	Verify that the results lists show the desired attributes.
6	Set eDirectory™ rights and establish any indexes needed to enhance performance.	eDirectory rights:  To execute a search: <ul style="list-style-type: none"> <li>◆ The user performing the search needs Browse rights to any users or objects being searched.</li> </ul> To save a search (for non-Administrative users): <ul style="list-style-type: none"> <li>◆ <i>Trustee</i> of the organizational unit and the organization where they will be executing the search.</li> <li>◆ <i>User</i> requires write, self, and supervisor rights.</li> </ul> <b>Performance enhancement.</b> The performance of the search can be improved by adding an eDirectory value index to the attribute on which the search is based.

For more information on defining different results list display formats, see [Section 15.2.2, "Setting Search List preferences," on page 275](#).

## 15.2.1 Directory Abstraction Layer Setup

The entities and attributes that can be selected from the search criteria drop-down list and data returned from the Identity Vault searches must be defined in the directory abstraction layer. [Table 15-4](#) shows the properties that you should set for the entities and attributes used by search list.

**Table 15-4** Search List Entities and Attributes

Definition Type	Setting	Directory Abstraction Layer Value
entity	view	Selected (true)

Definition Type	Setting	Directory Abstraction Layer Value
attribute	enable	Selected (true).
	search	Selected (true).  Any attribute that you want to appear in the list of available search criteria must have search=true. When false, you cannot define a search on this attribute or include it in a results list format.
	hide	Unselected (false).  Any attribute that you want to include in the results list must have hide=false.

**Other Directory abstraction layer settings.** The directory abstraction layer data type, format type, filters, and search scope also impact the Search List portlet. The data type and format type affect the appearance; the filter and search scope affect how much data is returned.

For more information, see *Identity Manager User Application: Design Guide*.

## 15.2.2 Setting Search List preferences

You can define two types of preferences:

- ♦ [“Search preferences” on page 275](#)
- ♦ [“Results List format preferences” on page 277](#)

### Search preferences

The search preferences are contained in a single preference page:

Search List

Preference	Preference Value	Req.	Read only	Hide																		
<a href="#">Reset</a> Default Mode:	<div style="border: 1px solid #ccc; padding: 2px; width: fit-content;">My Saved Searches</div> <div style="margin-top: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="3">Choices</th> </tr> <tr> <th>Value</th> <th>Display</th> <th></th> </tr> </thead> <tbody> <tr> <td>MODE_SIMP</td> <td>Basic Search</td> <td><a href="#">Ins Del</a></td> </tr> <tr> <td>MODE_ADVA</td> <td>Advanced Se</td> <td><a href="#">Ins Del</a></td> </tr> <tr> <td>MODE_SAVE</td> <td>My Saved Se</td> <td><a href="#">Ins Del</a></td> </tr> <tr> <td colspan="3" style="text-align: center;"><a href="#">Add</a></td> </tr> </tbody> </table> </div>	Choices			Value	Display		MODE_SIMP	Basic Search	<a href="#">Ins Del</a>	MODE_ADVA	Advanced Se	<a href="#">Ins Del</a>	MODE_SAVE	My Saved Se	<a href="#">Ins Del</a>	<a href="#">Add</a>			<a href="#">Detail</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Choices																						
Value	Display																					
MODE_SIMP	Basic Search	<a href="#">Ins Del</a>																				
MODE_ADVA	Advanced Se	<a href="#">Ins Del</a>																				
MODE_SAVE	My Saved Se	<a href="#">Ins Del</a>																				
<a href="#">Add</a>																						
<a href="#">Reset</a> Pagination:	<div style="border: 1px solid #ccc; padding: 2px; width: fit-content;">10</div> <div style="margin-top: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2">Range</th> </tr> <tr> <th>Min</th> <th>Max</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> </div>	Range		Min	Max	<input type="text"/>	<input type="text"/>	<a href="#">Detail</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>												
Range																						
Min	Max																					
<input type="text"/>	<input type="text"/>																					
<a href="#">Reset</a> Results Limit:	<div style="border: 1px solid #ccc; padding: 2px; width: fit-content;">0</div> <div style="margin-top: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2">Range</th> </tr> <tr> <th>Min</th> <th>Max</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> </div>	Range		Min	Max	<input type="text"/>	<input type="text"/>	<a href="#">Detail</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>												
Range																						
Min	Max																					
<input type="text"/>	<input type="text"/>																					
<a href="#">Reset</a> Search and List complex preference:	<a href="#">View/Edit Custom Preference</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																		

The search preferences are defined in [Table 15-5 on page 277](#).



**Table 15-5** Search List Portlet Preferences

Preference	What to Do
Default Mode	<p>Specify how you want the portlet to display when a user first accesses it. Values are:</p> <p><i>Basic Search.</i> Allows users to enter a single search criteria. For example:</p> <pre>First Name starts with A</pre> <p><i>Advanced search.</i> Allows users to define multiple search criteria in one or more search blocks. Users can use the <code>and</code> and <code>or</code> logical operators within the search criteria or among the search blocks. For example, users can create a search like this:</p> <pre>(First Name starts with A or First Name starts with B) and (Region = Northeast or Region = Southeast)</pre> <p>OR</p> <pre>(First Name starts with A and Last Name starts with B) or (First Name starts with B and Last Name starts with A)</pre> <p><i>My Saved Searches.</i> Displays a list of searches saved by the currently logged in user. The searches are saved in the user's <code>srprvQueryList</code> attribute.</p> <hr/> <p><b>NOTE:</b> Users can access any of these modes at runtime by executing or editing a search or clicking a button at the bottom of the portlet.</p>
Pagination	The maximum number of rows shown at a time.
Results Limit	The maximum number of matches returned by the search. If set to 0, then the maximum defers to the directory abstraction layer setting.
Search and List complex preference	<p>Click to refine the</p> <ul style="list-style-type: none"><li>◆ Entities to search</li><li>◆ Result set type</li><li>◆ Attributes to include in the pages and the order in which they appear</li></ul>

### Results List format preferences

The complex preferences page lets you define the entities to include in the search and how to format the results list. The default preferences page looks like this:

Modify Content Preferences for this Registration instance (Search List)

Search List

Search and List complex preference

**Search List**

**Summary**

Entity Definition	User	<input type="checkbox"/>
Show Email as icon	<input checked="" type="radio"/> true <input type="radio"/> false	
Result List Types	default	<input type="checkbox"/>
Identity	<input checked="" type="radio"/> sort	<input type="checkbox"/>
Attributes	First Name	<input type="checkbox"/>
	Last Name	<input checked="" type="checkbox"/>
	Title	<input type="checkbox"/>
	Email	<input type="checkbox"/>
	Telephone Number	<input type="checkbox"/>
Location	<input type="radio"/> sort	<input type="checkbox"/>
Attributes	First Name	<input type="checkbox"/>
	Last Name	<input type="checkbox"/>
	Region	<input checked="" type="checkbox"/>
	Email	<input type="checkbox"/>
	Telephone Number	<input type="checkbox"/>
Organization	<input type="radio"/> sort	<input type="checkbox"/>

[Return to List View](#)

The complex preferences are listed in [Table 15-6 on page 279](#).

**Table 15-6** Search List Portlet: Complex Preferences

Preference	What to Do
Entity Definition	<p>Each object that is valid for searching (<code>view=true</code>) has a corresponding Entity Definition block on this preferences page. Use these preferences to:</p> <ul style="list-style-type: none"><li>◆ Define the objects included in the search.</li><li>◆ Modify the results list format definitions (such as adding and removing the attributes that are displayed and their default sort order).</li><li>◆ Remove any objects that you do not want included in the search by clicking <i>Delete</i>, shown on the Entity Definition line. This deletes the entire entity definition block.</li></ul> <p>You can add the object back to the search later by clicking <i>Add Entity Definition</i> (located at the bottom of the page) and completing the wizard selection panels.</p> <hr/> <p><b>TIP:</b> If an object does not appear in this list, but is listed in the directory abstraction layer, check the <i>view</i> modifier (on the entity object). If it is set to false, then the entity cannot be used by the identity portlets.</p>
Show email as Icon	<p>When set to <i>True</i> and an e-mail attribute is specified in the results list, it displays as an icon. When set to <i>False</i>, the e-mail attribute displays the full e-mail address. The e-mail attribute (whether text or icon) is a clickable <i>mailto:</i> link.</p>
Results List Types (default)	<p>Specifies the results list default format for the current entity. The default is used only when a different format is not selected by the current user.</p>
Results List display format block	<p>Specifies the display format (such as Identity, Location, or Organizational pages) and includes the set of attributes to include for the type.</p> <p>To remove a Results List Type:</p> <ul style="list-style-type: none"><li>◆ Click <i>Delete</i> next to the <i>Results List Type</i>.</li></ul> <p>This deletes the page type and all of its associated attributes from the search.</p> <p>To add a result set page:</p> <ul style="list-style-type: none"><li>◆ Click <i>Expand</i> and select the result set format from the list of choices.</li></ul>

Preference	What to Do
Attributes	<p>Specifies the set of attributes that will be displayed for the particular display format.</p> <p>To add or remove an attribute:</p> <ul style="list-style-type: none"> <li>◆ Click the <i>Modify attributes</i> button.</li> <li>◆ To add an attribute, select it (from the list of Available attributes).</li> <li>◆ Click the arrow to move it to the Selected list. Do the reverse to remove an attribute from the Results List.</li> <li>◆ To reorder the attributes list, click the up and down arrows to the right of the selected list.</li> <li>◆ Click <i>Submit</i>.</li> </ul> <p><b>Attributes and data types.</b> The attribute's data type affects the way it is displayed. For example, if an attribute is defined as a sub-type of local list or global list then possible values are displayed in a drop-down list box in the Basic or Advanced Search Criteria screens. If the type is DN then a finder and history button are displayed to allow users to select a value in the Basic or Advanced Search Criteria screens, and the DN are resolved to a user-friendly display in the results list. The data type and sub-type also restrict the comparison operator displayed for the user to ensure that only valid comparisons are constructed.</p> <p>For more information, see <a href="#">Section 1.2.2, "Directory Abstraction Layer," on page 24</a>.</p>
Results List display format block Sort	<p>The sort order for the Results List is based on this attribute. The default sort order only takes effect if the Result Set Type is not the display format for the current user session.</p> <p><b>Multi-valued attributes and single-valued attributes.</b> The number of records displayed in a results list varies depending on whether the sort attribute is single- or multi-valued. Sorting on multi-value attributes generally appears to result in more records, although the total number of matches remains the same. This is because each value of a multi-valued attribute is shown on a line by itself.</p>

### Completing the Preferences Panel

To verify that you have submitted valid entries, click *Submit*. If an entry is invalid, you will see an error message displayed at the top of the preferences page. When you are able to resolve all of the errors, click *Return to List View*, then click *Save Preferences*.

## 15.3 Configuring Search List for Anonymous Access

To set up the Search List portlet for anonymous access:

- 1 Go to *Administration > Portlet Admin*.
- 2 Register and name a new instance of the Search List portlet, for example, Public Search.
- 3 Select the new instance and go to *Settings*.

**4** Set *Requires Authentication* to false, then click *Save Settings*.

**5** Go to *Preferences*, then

- ♦ Change *Default Search Mode* to *Basic* or *Advanced* (Saved Search mode is not valid for an anonymous user).
- ♦ Consider specifying a Detail Portlet instance that is also set up for public access (*Requires Authentication* is set to false). If you use the default DetailPortlet, the user will be forced to log in when viewing the detail of any result list link.
- ♦ Go to *View/Edit Custom preferences* and remove any entities or attributes that you do not want the guest user to see.

To create a new shared page for the anonymous Search List:

**1** Go to *Administration > Page Admin*.

**2** Create a new Page and add it to the Guest Pages category (and any other categories for logged-in users.)

**3** Click *Add Permissions*. Deselect *View Permissions set to admin only*.

**4** Save the page.

If the Search List portlet instance requires a DNLookup attribute, you need to change the ParamListPortlet setting *Requires Authentication* to false.



# Configuring and Managing Provisioning Workflows



These sections describe how to configure and manage provisioning requests, provisioning workflows, and provisioning teams:

- ♦ [Chapter 16, “Configuring the User Application Driver to Start Workflows,” on page 285](#)
- ♦ [Chapter 17, “Configuring Provisioning Request Definitions,” on page 299](#)
- ♦ [Chapter 18, “Managing Provisioning Workflows,” on page 329](#)
- ♦ [Chapter 19, “Configuring Provisioning Teams,” on page 351](#)





# Configuring the User Application Driver to Start Workflows

This section describes the User Application driver and how to configure it to automatically trigger a workflow based on an event in the Identity Vault.

- ♦ [Section 16.1, “About the User Application Driver,” on page 285](#)
- ♦ [Section 16.2, “Setting Up Workflows to Start Automatically,” on page 286](#)

## 16.1 About the User Application Driver

The User Application driver is responsible for starting provisioning workflows and for notifying the User Application of changes in the Identity Vault (for example, when you make changes to the directory abstraction layer using the Designer for Identity Manager). Only the Subscriber channel is used in this driver. The driver processes messages from the Identity Vault to the User Application running on an application server. Although there are events that occur in the User Application that are reported back to the Identity Vault, these events do not flow through the Publisher channel of the User Application driver.

When the application server is started, the driver establishes a session with the application server. The driver sends messages to the User Application running on the application server (for example, “retrieve a new set of virtual directory definitions”).

The source components of the driver include:

- ♦ `ComposerDriverShim.jar` – the Composer Driver Shim. It is installed in the `lib` directory `\Novell\NDS\lib` in Windows or the `classes` directory `/usr/lib/dirxml/classes` in Linux.
- ♦ `srvprvUAD.jar` – The Application Driver Shim. It is installed in the `lib` directory `\Novell\NDS\lib` in Windows or the `classes` directory `/usr/lib/dirxml/classes` in Linux.
- ♦ `UserApplicationDriver.xml` - A file that contains configuration data for setting up the new driver. It is installed in the `DirXML.Drivers` directory, which is `\Tomcat\webapps\nps\DirXML.Drivers` in Windows or `/usr/lib/dirxml/rules/DirXML.Drivers` in Linux.

The User Application driver components are installed when you install Identity Manager. Before you can run the Identity Manager User Application, you must add the User Application driver to a new or existing driver set, and activate the driver.

Depending on your work environment, very little configuration of the User Application driver might be required, or you might want to implement a complex set of business rules in the driver policies. The User Application driver provides the same flexible mechanisms for data synchronization as other Identity Manager drivers.

## 16.2 Setting Up Workflows to Start Automatically

When the provisioning module is installed, workflows are automatically started when a user starts a provisioning request by requesting a resource. In addition, the Identity Manager User Application driver listens for events in the Identity Vault and, when configured to do so, responds to events by starting the appropriate provisioning workflows. For example, you can configure the User Application driver to automatically start a provisioning workflow if a new user is added to the Identity Vault. You configure the User Application driver to automatically start workflows using Identity Manager policies and rules.

### 16.2.1 About Policies

You can use filters and policies with the User Application driver in the same way that you can with other Identity Manager drivers. When an event occurs in the Identity Vault, Identity Manager creates an XML document that describes the event. The XML document is passed along the channel to the connected system (in this case, the connected system is the User Application). Filters and policies associated with a driver allow you to define how to respond to the event, and in the process transform that XML document to the format that is expected by the connected system. Identity Manager provides several categories of policies (for example, Event Transformation, Command Transformation, Schema Mapping, Output Transformation) that you can apply, in a prescribed order, to transform the XML document.

This section provides an example of starting a workflow based on events in the Identity Vault. Although any of the policies can be used to trigger a workflow, the example presented in this section demonstrates the easiest and most useful method.

When you create a User Application driver, an Event Transformation Policy is created for use by the driver. The Event Transformation Policy is responsible for creating the XML document that is processed by the remaining Subscriber channel policies.

---

**NOTE:** Do not change the Event Transformation policy that was created when the User Application driver was created. The DN of this policy begins with `Manage.Modify.Subscriber`. Changing this policy might cause the workflow process to fail.

---

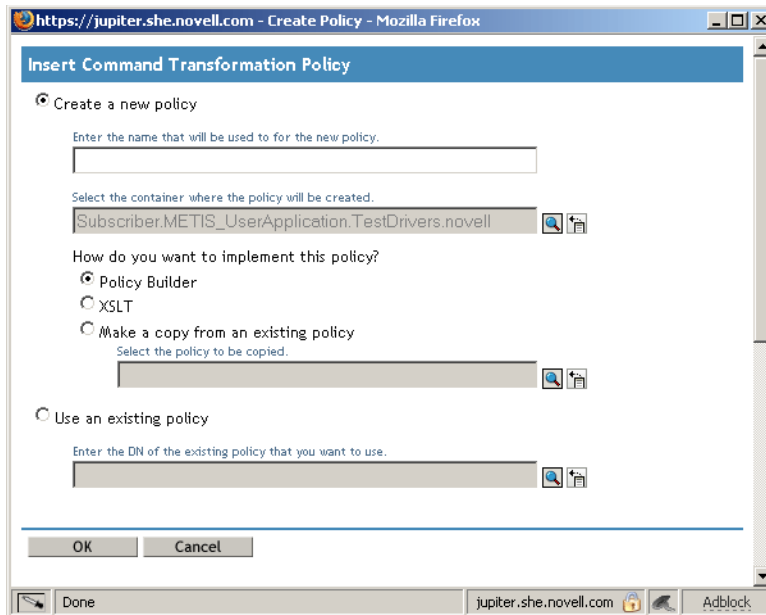
An empty Schema Mapping Policy is also created. You can use this policy as a starting point for triggering a workflow, based on events in the Identity Vault.

### 16.2.2 Using the Policy Builder

The easiest way to automatically start a workflow based on an Identity Vault event is to use the Policy Builder. The Policy Builder provides a Start Workflow action that simplifies the process of setting up a workflow to start automatically.

- 1 In iManager, expand the *Identity Manager Role*, then click *Identity Manager Overview*.
- 2 Specify a driver set.
- 3 Click the driver for which you want to manage policies. The *Identity Manager Driver Overview* opens.
- 4 Click the policy that you want to edit.

5 Click *Insert* to open the Policy Builder.



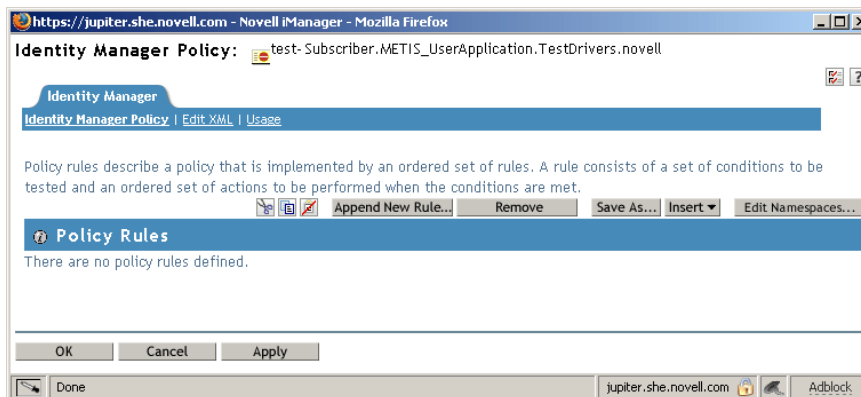
6 Click *Create a new policy*.

7 Type a name for the policy.

8 Click *Policy Builder*.

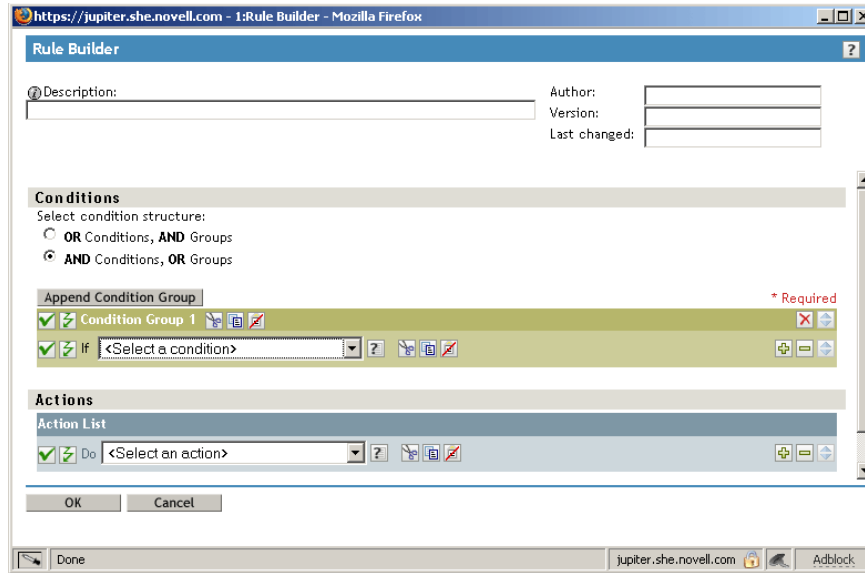
9 Click *OK*.

iManager displays a screen that lists defined policy rules.



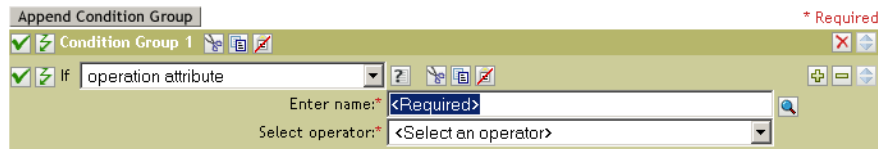
10 Click *Append New Rule*.

iManager displays the *Rule Builder*.



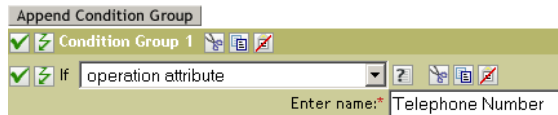
**11** Type a *Description* for the rule.

**12** Select *operation attribute* for the *If* condition in *Condition Group 1*.



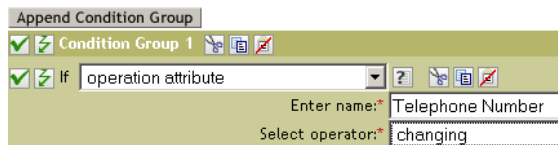
**13** Use the *Browse attributes* button for the *Enter name* field to specify the Identity Vault attribute that you want to use to start the workflow.

For example, to start a workflow when a telephone number changes, select the *Telephone Number* attribute.



**14** Use the *Select Operator* list to select the operator to use to test the specified attribute.

For example, to start a workflow when a telephone number changes, select *changing*.



- 15 Select *start workflow* from the *Action* list.

- 16 Use the Object Selector in the *Enter provisioning request DN* field to select the provisioning request definition that you want to be executed when the *if* condition is true.

The *Enter user application URL* and *Enter authorized user DN* fields are filled in automatically.

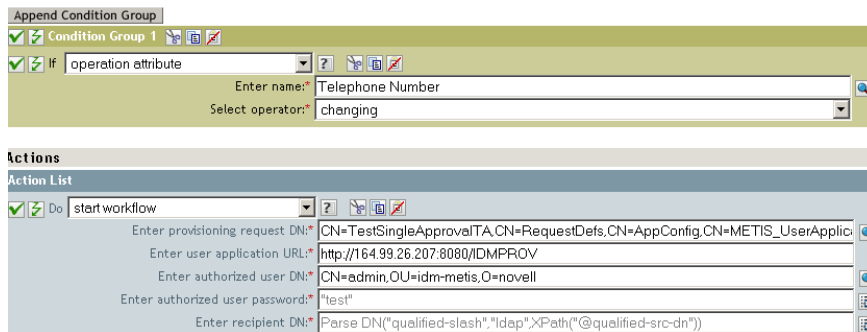
- 17 Type the password for the User Application administrator in the *Enter authorized user password* field.

We recommend using a named password, because typing a password in clear text is a security risk. See “Named Password” in the [Policies in iManager in Identity Manager 3.5](http://www.novell.com/documentation/idm35/index.html?page=/documentation/idm35/policy_imanager/data/bookinfo.html) ([http://www.novell.com/documentation/idm35/index.html?page=/documentation/idm35/policy\\_imanager/data/bookinfo.html](http://www.novell.com/documentation/idm35/index.html?page=/documentation/idm35/policy_imanager/data/bookinfo.html)) guide.

- 18 In the *Enter recipient DN* field, specify the DN of the recipient of the workflow in LDAP format.

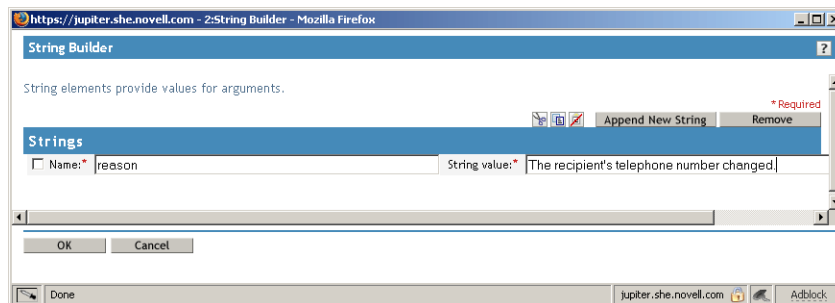
The expression for the recipient DN must evaluate to a DN that conforms to RFC 2253 format (in other words, cn=user,ou=organizational unit,o=organization). For example, you can click the *Argument Builder* button in the *Enter recipient DN* field to create the following expression to pass the recipient’s DN to the workflow:

```
Parse DN ("qualified-slash", "ldap", XPath("@qualified-src-dn"))
```



- 19 Specify the arguments for the workflow in the *Enter additional arguments* field.

You must use this field to specify the *reason* attribute, which is required by the workflow. You can click the *String Builder* button in the *Enter additional arguments* field to specify the *reason* attribute and create a value for the attribute (for example, “the recipient’s telephone number has changed”).



- 20 Click *OK* to close the Rule Builder.  
 21 Click *OK* to close the Policy Builder.  
 22 Click *OK* to close the Policies screen.  
 23 Make sure that you add any attributes needed by the workflow to the filter.

In the example described in this procedure, you would need to add *Telephone Number* and *CN* to the filter. For information about adding objects to the filter, see “Controlling the Flow of Objects with the Filter” in the *Policies in iManager in Identity Manager 3.5* ([http://www.novell.com/documentation/idm35/index.html?page=/documentation/idm35/policy\\_imanager/data/bookinfo.html](http://www.novell.com/documentation/idm35/index.html?page=/documentation/idm35/policy_imanager/data/bookinfo.html)) guide.

### 16.2.3 Using the Schema Mapping Policy Editor

The Schema Mapping Policy Editor provides an alternative method of starting a workflow automatically, by mapping Identity Vault attributes to workflow runtime data. To get you started, the User Application driver provides an empty policy to edit. Workflow runtime data is available from the workflow definition template described in [Chapter 17, “Configuring Provisioning Request Definitions,” on page 299](#).

When a workflow is created, the following global attributes are created in the Identity Vault:

- ◆ `<workflowName>_StartWorkflow`. This attribute starts a workflow.

- ◆ `<workflowName>_recipient`. This attribute accepts runtime data needed by the workflow from the Identity Vault.
- ◆ `<workflowName>_reason`. This attribute accepts runtime data needed by the workflow from the Identity Vault.

Two other attributes always exist and accept runtime data needed by the workflow from the Identity Vault:

- ◆ AllWorkflows:reason
- ◆ AllWorkflows:recipient

Ensure you have the following information before you set up a workflow to start based on an event in the Identity Vault:

- ◆ The name of the Identity Vault attribute that you want to use as a trigger for the workflow
- ◆ The name of the workflow that you want to start. All workflows include a special attribute named `<workflowName>_StartApprovalFlow`. You configure a workflow to start automatically based on an event in the Identity Vault by mapping the desired eDirectory attribute to the `<workflowName>_StartApprovalFlow` attribute for the workflow.

### To set up a workflow to start based on an event in the Identity Vault:

- 1 In iManager, click the *Identity Manager Overview* link under Identity Manager in the iManager navigation tree.



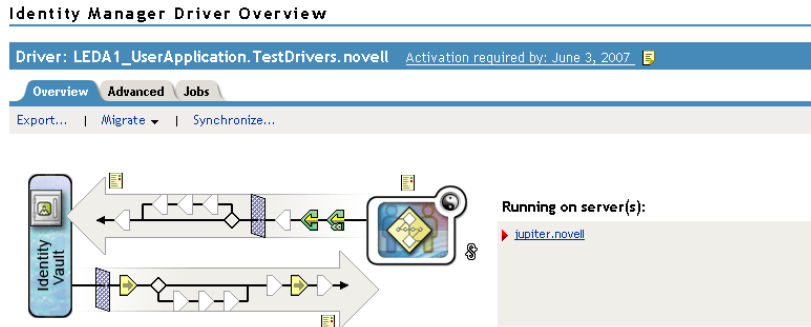
The Identity Manager Overview page displays. This page prompts you to select a driver set.

- 2 Click *Search Entire Tree*; then click *Search*. The Identity Manager Overview page displays, with a graphic that depicts the drivers in the currently selected driver set.
- 3 Click the large driver icon for the User Application driver:

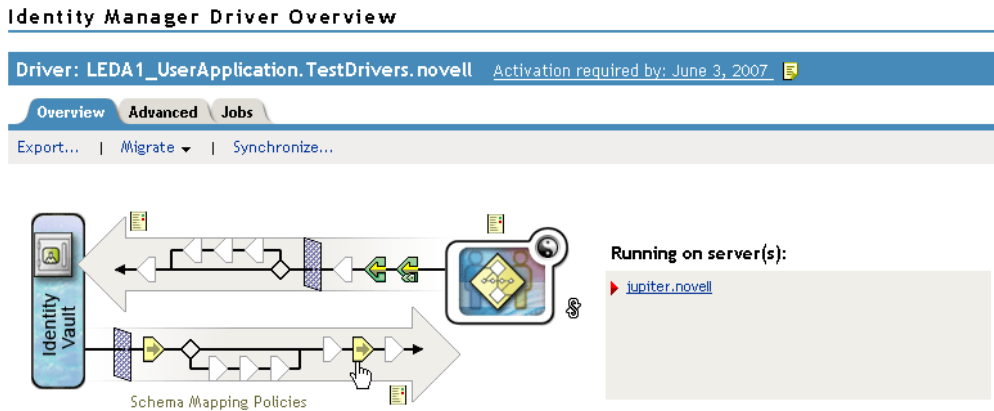


UserApplication

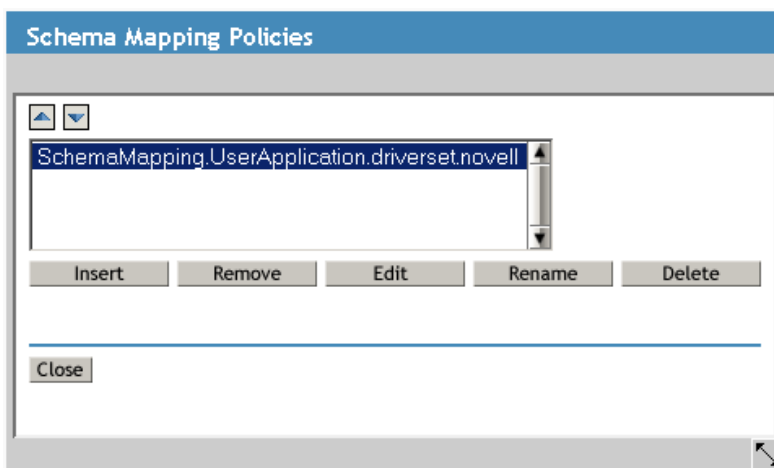
The Identity Manager Driver Overview displays:



The top horizontal arrow represents the Publisher channel (which is not used in the User Application driver) and the bottom horizontal arrow represents the Subscriber channel. As you pass the mouse pointer over an object in the graphic, a description of the object displays:

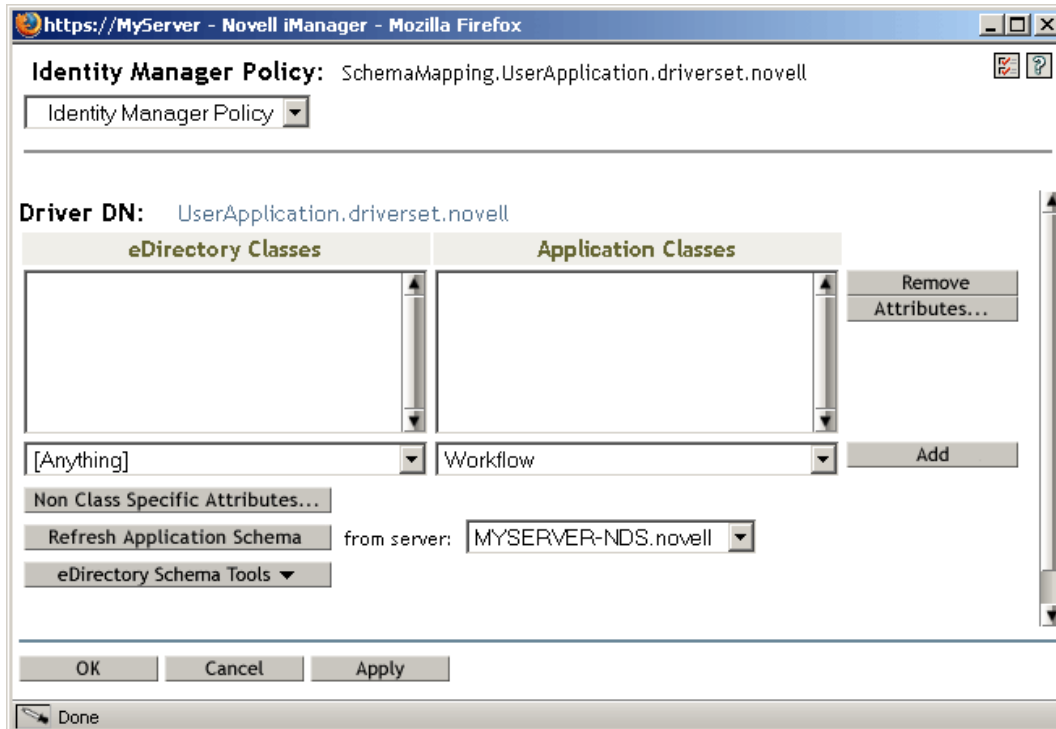


- 4 Click the *Schema Mapping Policies* icon. The *Schema Mapping Policies* dialog box displays:



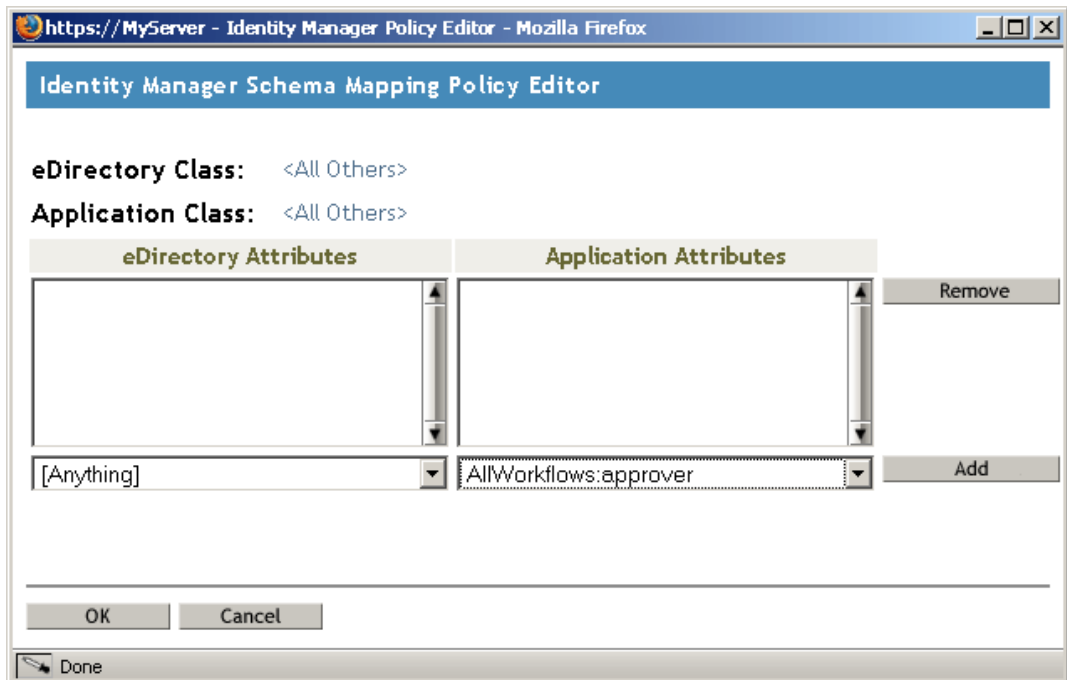


- 5 Click *Edit*. The Identity Manager Policy dialog box displays. (This dialog box maps Identity Vault classes to application classes, but this procedure uses it to map eDirectory attributes to global User Application attributes.)



- 6 Click *Refresh Application Schema*. A message displays informing you that the driver must be stopped in order to read the schema, then restarted. It might take about 60 seconds to refresh the schema. This step reads the latest set of workflow information in preparation for the following step, which specifies the information to move from the Identity Vault to the workflow that will be started.
- 7 Click *OK* to refresh the schema. A message displays when the schema refresh is completed.
- 8 Click *OK* to close the schema refresh message. You are returned to the Identity Manager Policy dialog box.

- 9 Click *Non Class Specific Attributes*. The Identity Manager Schema Mapping Policy Editor displays.



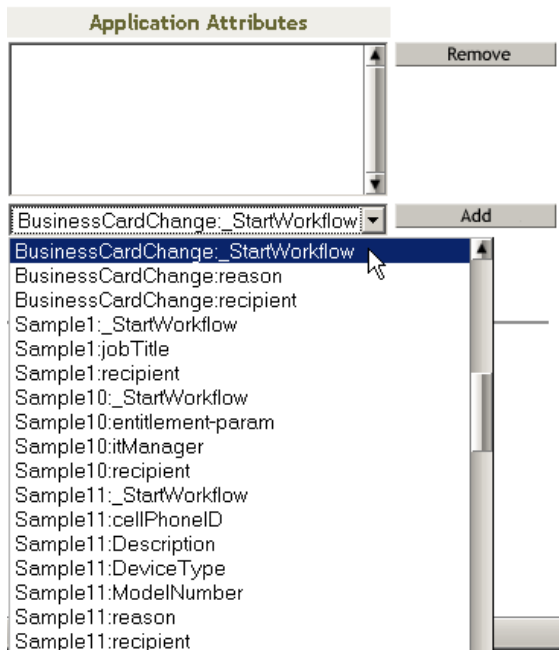
The *eDirectory Attributes* drop-down list contains all eDirectory attributes.

The *Application Attributes* drop-down list contains the attributes in all active Workflows. Attributes in the list are prefaced with either `AllWorkflows` (meaning that the attribute applies to all workflows) or the name of a specific workflow. If you want the same eDirectory attribute (for example `manager`) to be mapped to the `manager` attribute for all workflows, map `manager` to `Allworkflows:manager`. If you want a different eDirectory attribute (for example, `HRmanager`) to be used for a specific workflow, map the eDirectory attribute to the specific workflow attribute (for example `BusinessCardChange:manager`).

Attributes that have been mapped are displayed side-by-side in the *eDirectory Attributes* and *Application Attributes* columns.

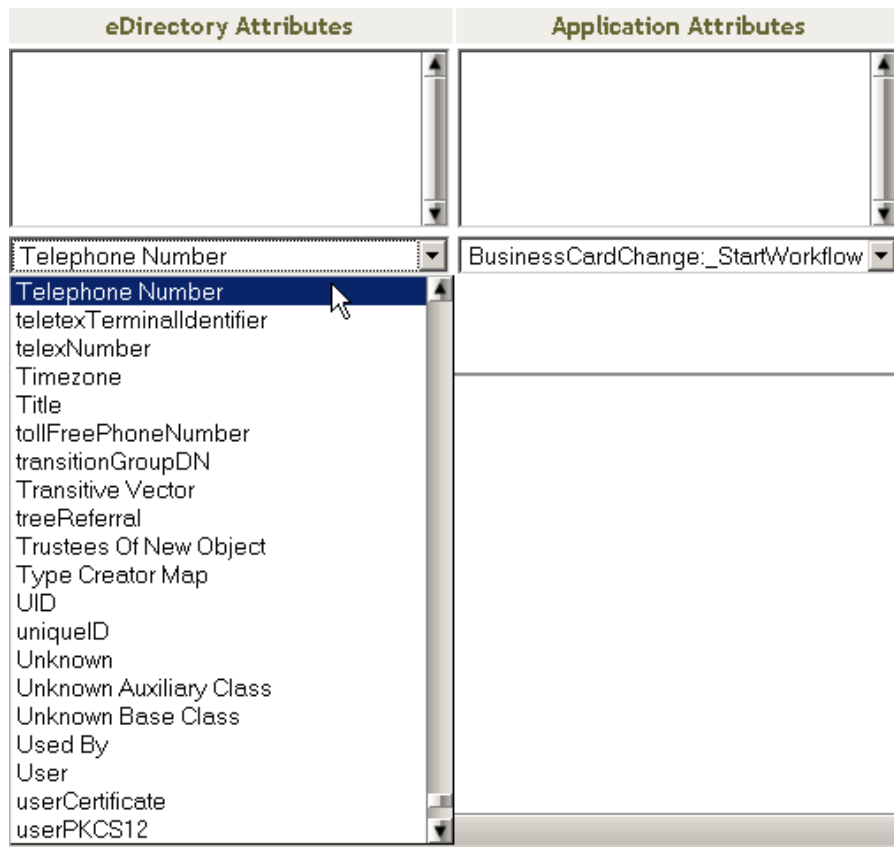
In the following steps, map the eDirectory attribute that you want to use to start the workflow to the `_StartWorkflow` attribute for that workflow. If additional eDirectory attributes are expected by the workflow, you should also map those attributes. For example, if an eDirectory `Address` attribute is the trigger for a workflow, the workflow can also require attributes like `City` and `State`. Alternatively, these attributes can be mapped in policies.

- 10** In the *Application Attributes* list, select the `_StartWorkflow` attribute for the workflow that you want to configure. The following example shows the `_StartWorkflow` attribute for a `BusinessCardChange` workflow (`BusinessCardChange_StartWorkflow`).

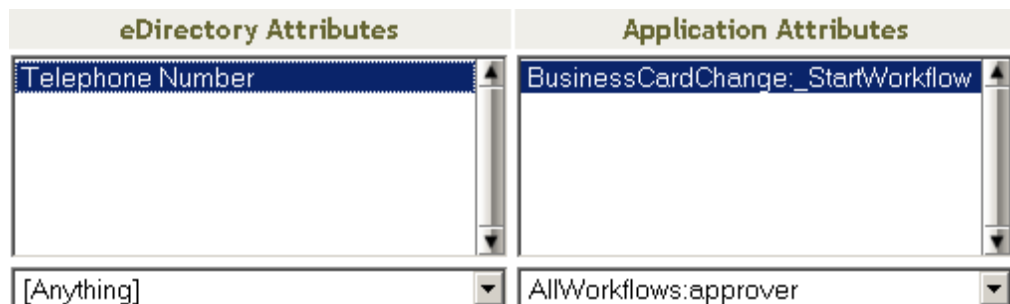


- 11** In the *eDirectory Attributes* list, select the `eDirectory` attribute that you want to use to start the workflow when that attribute changes. In the following example, the `Telephone` attribute is

selected. This means that the BusinessCardChange workflow starts whenever an employee's telephone number changes.



**12** Click *Add*. The eDirectory attribute is mapped to the Application attribute.



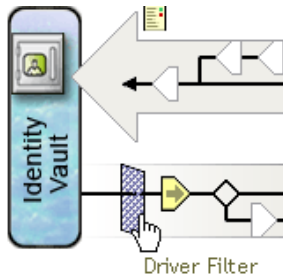
**13** Repeat **Step 10** through **Step 12** to map eDirectory attributes to the workflow `_reason` and `_recipient` attributes.

**14** If additional eDirectory attributes are needed by the workflow, repeat **Step 10** through **Step 12** until you have mapped all of the attributes that you need to map.

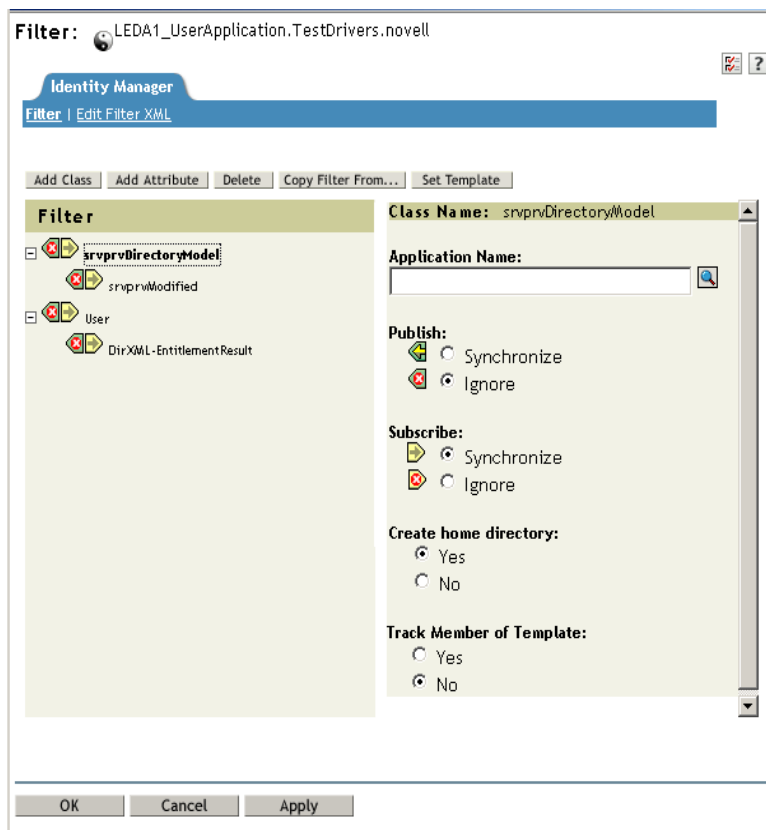
The workflow starts automatically when a change occurs in the eDirectory attribute that is mapped to an application `_startApprovalFlow` attribute. However, the eDirectory attribute only reaches the Schema Mapping policy if the eDirectory attribute is included in the Driver Filter. In the following steps, add the eDirectory attribute to the Driver Filter.

**15** Click *OK* to close the Schema Mapping Policy Editor.

- 16 Click *OK* to close the Identity Manager Policy dialog box.
- 17 Click *Close* to close the Schema Mapping Policies dialog box.
- 18 Click the *Driver Filter* icon.



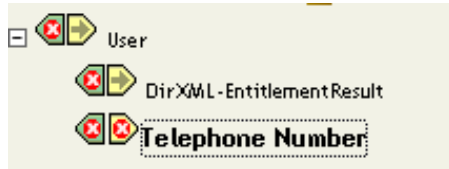
The filter window displays:



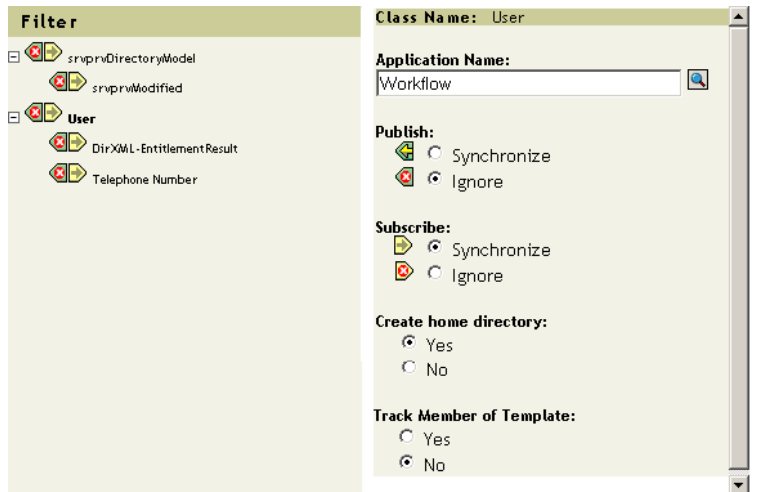
Event filters specify the object classes and the attributes for which the Identity Manager engine processes events. The read-only *Filter* list on the left shows the attributes of the class. The *Class Name* list on the right displays options associated with the target object.

- 19 Click the name of the class to which the attribute that you want to add to the filter belongs (for example, *User*).
- 20 Click *Add Attribute*. A list of attributes displays.

- 21 Select an attribute, then click *OK*. The attribute is added to the *Filter* list.



- 22 Click the attribute name. The synchronization options for the attribute are displayed on the panel on the right.



- 23 Under *Subscribe*, click *Synchronize*.



- 24 Specify any other attributes for the filter. Select *Synchronize* for an attribute if you want changes to attribute values to be reported and synchronized. Select *Ignore* if you do not want changes to attribute values to be reported and synchronized.
- 25 Click *OK*. A message displays asking you if you would like the driver to be restarted to put the changes into effect.
- 26 Click *OK*. You are returned to the Identity Manager Driver Overview page.

# Configuring Provisioning Request Definitions

# 17

This section provides instructions for configuring provisioning request definitions. Topics include:

- ◆ [Section 17.1, “About the Provisioning Request Configuration Plug-in,” on page 299](#)
- ◆ [Section 17.2, “Working with the Installed Templates,” on page 300](#)
- ◆ [Section 17.3, “Configuring a Provisioning Request Definition,” on page 302](#)

## 17.1 About the Provisioning Request Configuration Plug-in

To configure a provisioning request definition, you need to use the Provisioning Request Configuration plug-in to iManager. This plug-in lets you bind the provisioning request definition to a provisioned resource, specify the runtime characteristics of the associated workflow, and enable it for use. In this release, provisioned resources are mapped to Identity Manager entitlements.

You can find the Provisioning Request Configuration plug-in in the Identity Manager category in iManager. The plug-in includes the Provisioning Requests task in the Provisioning Configuration role. The Provisioning Requests task consists of the panels described in [Table 17-1](#).

**Table 17-1** *Provisioning Requests Task: Panels*

Panel	Description
Provisioning Driver Selection	Gives you the opportunity to select an Identity Manager User Application driver. The driver contains a set of predeployed provisioning request definitions, so you need to pick a driver before you can begin configuring your provisioning requests.
Provisioning Request Configuration	<p>Provides tools that let you:</p> <ul style="list-style-type: none"><li>◆ Browse the available provisioning request definitions and select one to configure</li><li>◆ Create a new provisioning request definition based on an existing definition</li><li>◆ Set the properties of a provisioning request definition</li><li>◆ Assign the provisioning request definition to a provisioned resource</li><li>◆ Edit the addressee and timeout settings for each activity in the associated workflow</li></ul> <p>When you choose to create a new provisioning request or edit an existing one, the plug-in runs the Provisioning Request Configuration Wizard.</p>

## 17.2 Working with the Installed Templates

You can define provisioning request definitions from scratch in the Designer for Identity Manager. Alternatively, you can define provisioning requests by modeling them after the provisioning request templates that ship with the product. To use the templates, you define new objects based on the installed templates and customize these objects to suit the needs of your organization.

The installed templates let you determine the number of approval steps required for the request to be fulfilled. You can configure a provisioning request to require:

- ◆ No approvals
- ◆ One approval step
- ◆ Two approval steps
- ◆ Three approval steps
- ◆ Four approval steps
- ◆ Five approval steps

You can also specify whether you want to support sequential or parallel processing, and whether you want to approve or deny the request in the event that the workflow times out during the course of processing.

Identity Manager ships with the templates listed in [Table 17-2](#).

**Table 17-2** *Templates for Provisioning Requests*

Template	Description
Self Provision Approval	Allows a provisioning request to be fulfilled without any approvals.
One Step Approval (Timeout Approves)	Requires a single approval for the provisioning request to be fulfilled. If an activity times out, the activity approves the request and the work item forwards to the next activity.
Two Step Sequential Approval (Timeout Approves)	Requires two approvals for the provisioning request to be fulfilled. If an activity times out, the activity approves the request and the work item forwards to the next activity.  This template supports sequential processing.
Three Step Sequential Approval (Timeout Approves)	Requires three approvals for the provisioning request to be fulfilled. If an activity times out, the activity approves the request and the work item forwards to the next activity.  This template supports sequential processing.
Four Step Sequential Approval (Timeout Approves)	Requires four approvals for the provisioning request to be fulfilled. If an activity times out, the activity approves the request and the work item forwards to the next activity.  This template supports sequential processing.



<b>Template</b>	<b>Description</b>
Five Step Sequential Approval (Timeout Approves)	<p>Requires five approvals for the provisioning request to be fulfilled. If an activity times out, the activity approves the request and the work item forwards to the next activity.</p> <p>This template supports sequential processing.</p>
One Step Approval (Timeout Denies)	<p>Requires a single approval for the provisioning request to be fulfilled. If an activity times out, the workflow denies the request.</p> <p>This template supports sequential processing.</p>
Two Step Sequential Approval (Timeout Denies)	<p>Requires two approvals for the provisioning request to be fulfilled. If an activity times out, the workflow denies the request.</p> <p>This template supports sequential processing.</p>
Three Step Sequential Approval (Timeout Denies)	<p>Requires three approvals for the provisioning request to be fulfilled. If an activity times out, the workflow denies the request.</p> <p>This template supports sequential processing.</p>
Four Step Sequential Approval (Timeout Denies)	<p>Requires four approvals for the provisioning request to be fulfilled. If an activity times out, the workflow denies the request.</p> <p>This template supports sequential processing.</p>
Five Step Sequential Approval (Timeout Denies)	<p>Requires five approvals for the provisioning request to be fulfilled. If an activity times out, the workflow denies the request.</p> <p>This template supports sequential processing.</p>
Two Step Parallel Approval (Timeout Approves)	<p>Requires two approvals for the provisioning request to be fulfilled. If an activity times out, the activity approves the request and the work item forwards to the next activity.</p> <p>This template supports parallel processing.</p>
Three Step Parallel Approval (Timeout Approves)	<p>Requires three approvals for the provisioning request to be fulfilled. If an activity times out, the activity approves the request and the work item forwards to the next activity.</p> <p>This template supports parallel processing.</p>
Four Step Parallel Approval (Timeout Approves)	<p>Requires four approvals for the provisioning request to be fulfilled. If an activity times out, the activity approves the request and the work item forwards to the next activity.</p> <p>This template supports parallel processing.</p>

Template	Description
Five Step Parallel Approval (Timeout Approves)	Requires five approvals for the provisioning request to be fulfilled. If an activity times out, the activity approves the request and the work item forwards to the next activity.  This template supports parallel processing.
Two Step Parallel Approval (Timeout Denies)	Requires two approvals for the provisioning request to be fulfilled. If an activity times out, the workflow denies the request.  This template supports parallel processing.
Three Step Parallel Approval (Timeout Denies)	Requires three approvals for the provisioning request to be fulfilled. If an activity times out, the workflow denies the request.  This template supports parallel processing.
Four Step Parallel Approval (Timeout Denies)	Requires four approvals for the provisioning request to be fulfilled. If an activity times out, the workflow denies the request.  This template supports parallel processing.
Five Step Parallel Approval (Timeout Denies)	Requires five approvals for the provisioning request to be fulfilled. If an activity times out, the workflow denies the request.  This template supports parallel processing.

**Workflows and provisioned resources.** When you create a new provisioning request definition, you bind it to a provisioned resource. You can change the provisioned resource associated with the request definition, but not the workflow or its topology.

**Categories for provisioning requests.** Each provisioning request template is also bound to a category. Categories provide a convenient way to organize provisioning requests for the end user. The default category for all provisioning request templates is *Entitlements*. The category key, which is the value of the `srvprvCategoryKey` attribute, is *entitlements* (lowercase).

You can create your own categories by using the directory abstraction layer editor. When you create a new category, make sure the category key (the value of `srvprvCategoryKey`) is lowercase. This is necessary to ensure that categories work properly in the Identity Manager User Application.

For details on creating provisioning categories, see the *Identity Manager User Application: Design Guide*.

## 17.3 Configuring a Provisioning Request Definition

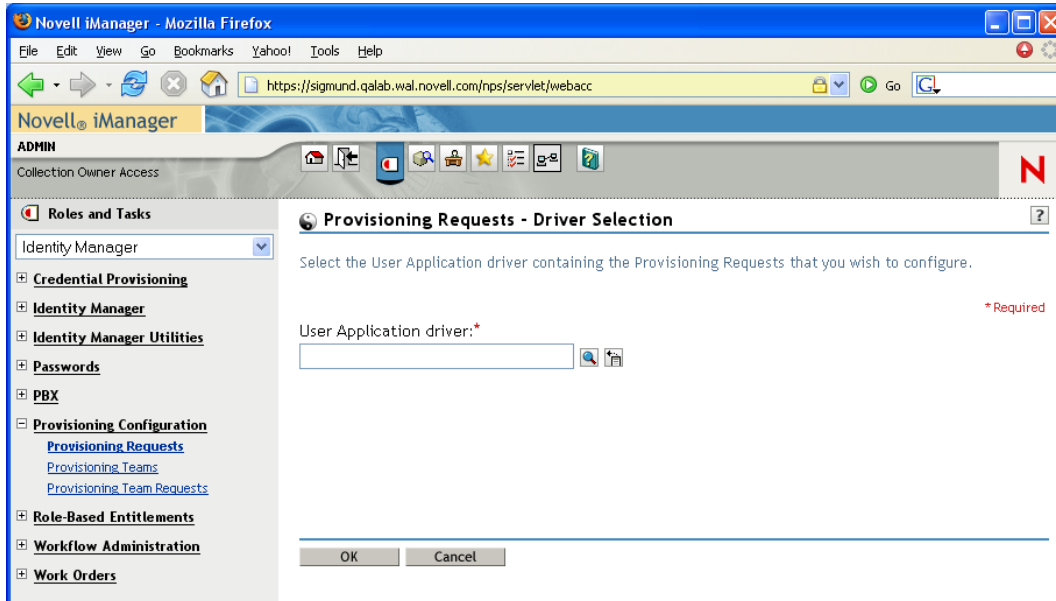
Before configuring a provisioning request definition, you need to select the Identity Manager User Application driver that contains the definition. Having selected the driver, you can create a new provisioning request definition or edit an existing definition. You can also delete provisioning request definitions, change the status of a request definition, or define rights for a request definition.

## 17.3.1 Selecting the Driver

To select an Identity Manager User Application driver:

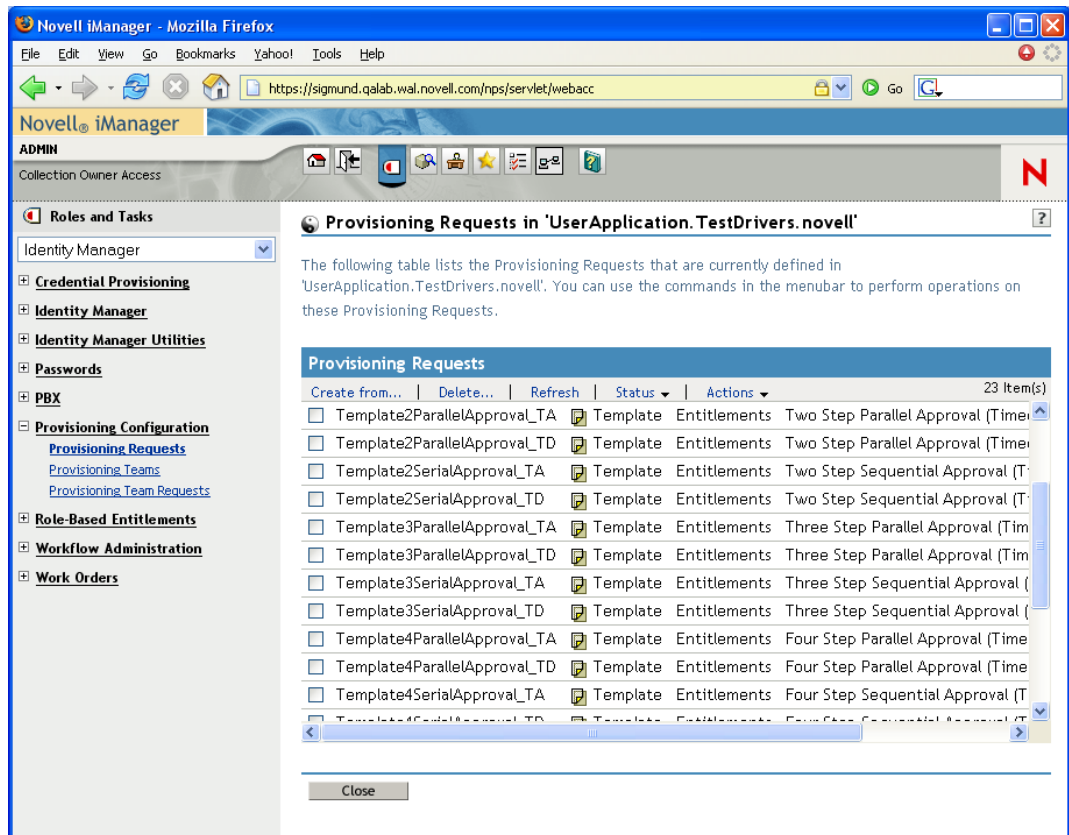
- 1 Select the *Identity Manager* category in iManager.
- 2 Open the *Provisioning Request Configuration* role.
- 3 Click the *Provisioning Requests* task.

iManager displays the User Application Driver panel.



- 4 Specify the driver name in the *User Application Driver* field, then click *OK*.

iManager displays the Provisioning Request Configuration panel. The Provisioning Request Configuration panel displays a list of available provisioning request definitions.



The installed templates appear in dark text with a status of *Template*. Request definitions that are templates do not display hypertext links because they are read only.

**NOTE:** If the request definitions were configured to use localized text, the names and descriptions for these definitions show text that is suitable for the current locale.

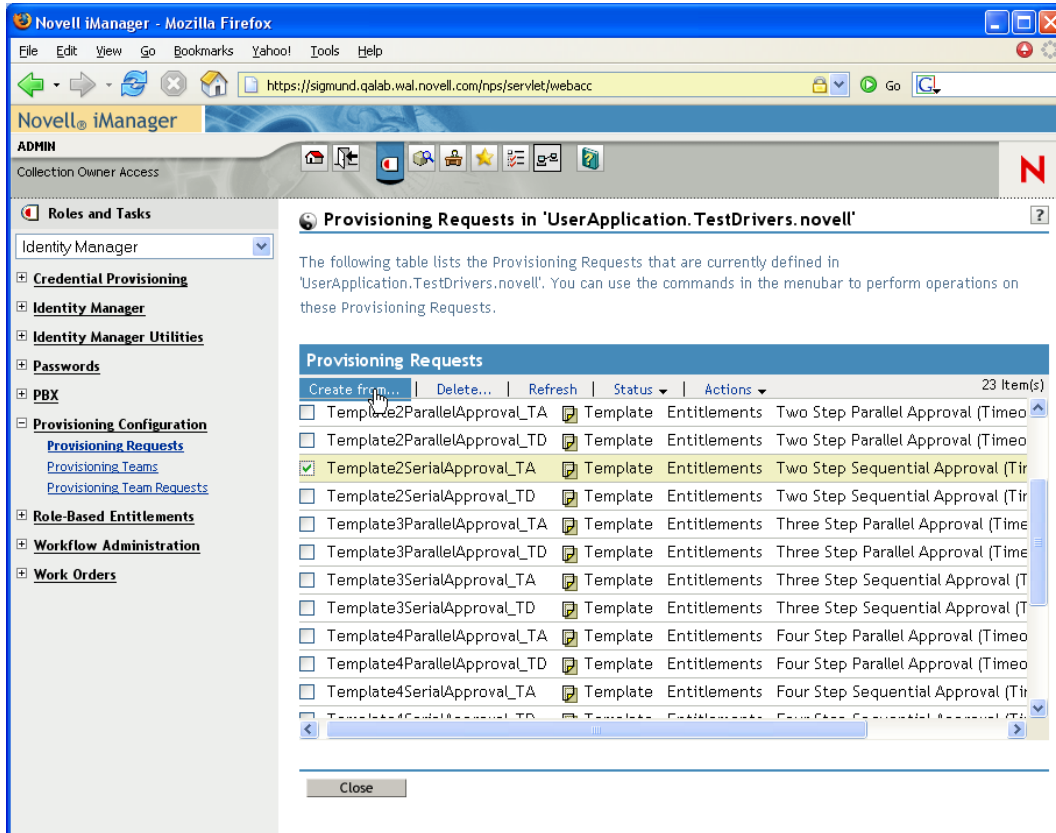
**Changing the driver.** When you have selected a driver, the driver selection remains in effect for the duration of your iManager session, unless you select a new driver. To select a new driver, click the *Actions* command, then choose *Select User Application Driver* from the *Actions* menu.

## 17.3.2 Creating or Editing a Provisioning Request

To create a new provisioning request:

- 1 Click the name of the provisioning request you want to use as a template in the Provisioning Request Configuration panel.

2 Click the *Create From* command in the Provisioning Request Configuration panel.



The first page of the Configure New Provisioning Request wizard displays.

https://sigmund.qalab.wal.novell.com - Provisioning Request Configuration Wizard - FrameSet - Mozilla Firefox

### Create New Provisioning Request

**Step 1 of 6:** Edit general Provisioning Request information.

Enter the name for the new Provisioning Request. Enter the display names and descriptions for the defined languages. English will be displayed for undefined languages.

Name (CN):

#### Provisioning Request Localized Strings

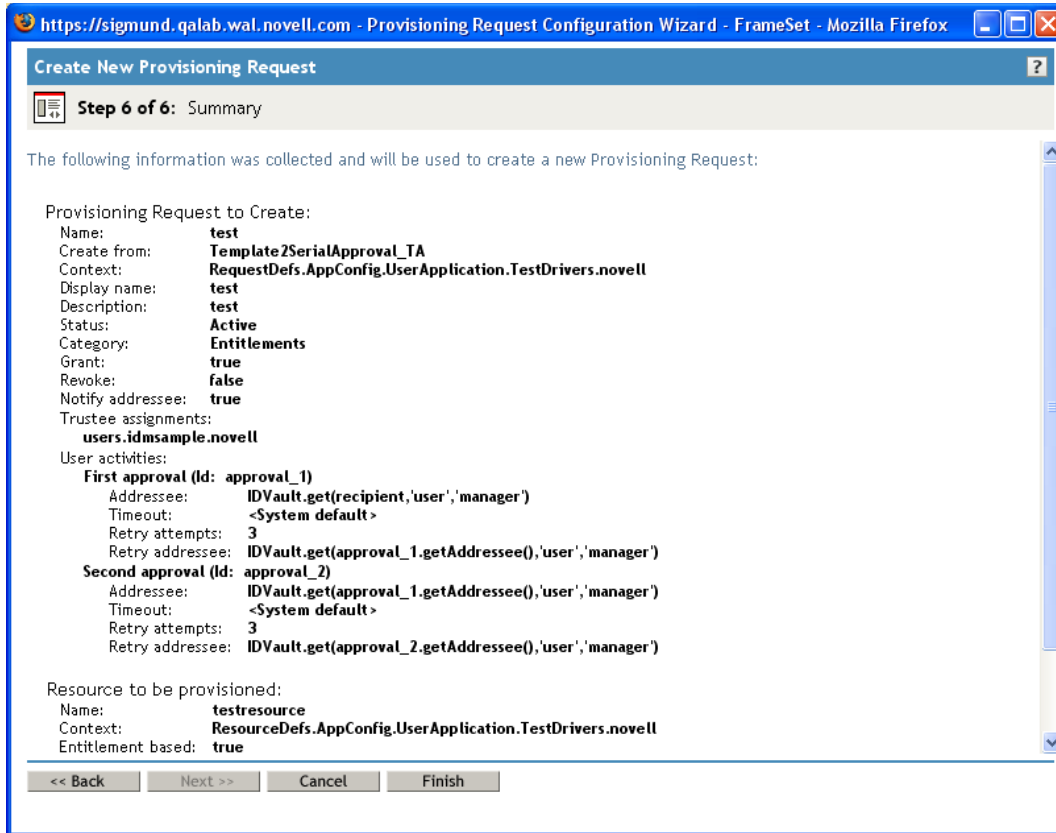
Add... | Delete...

Language	Display name	Description
<input type="checkbox"/> English	<input type="text"/>	<input type="text"/>

<< Back   Next >>   Cancel   Finish

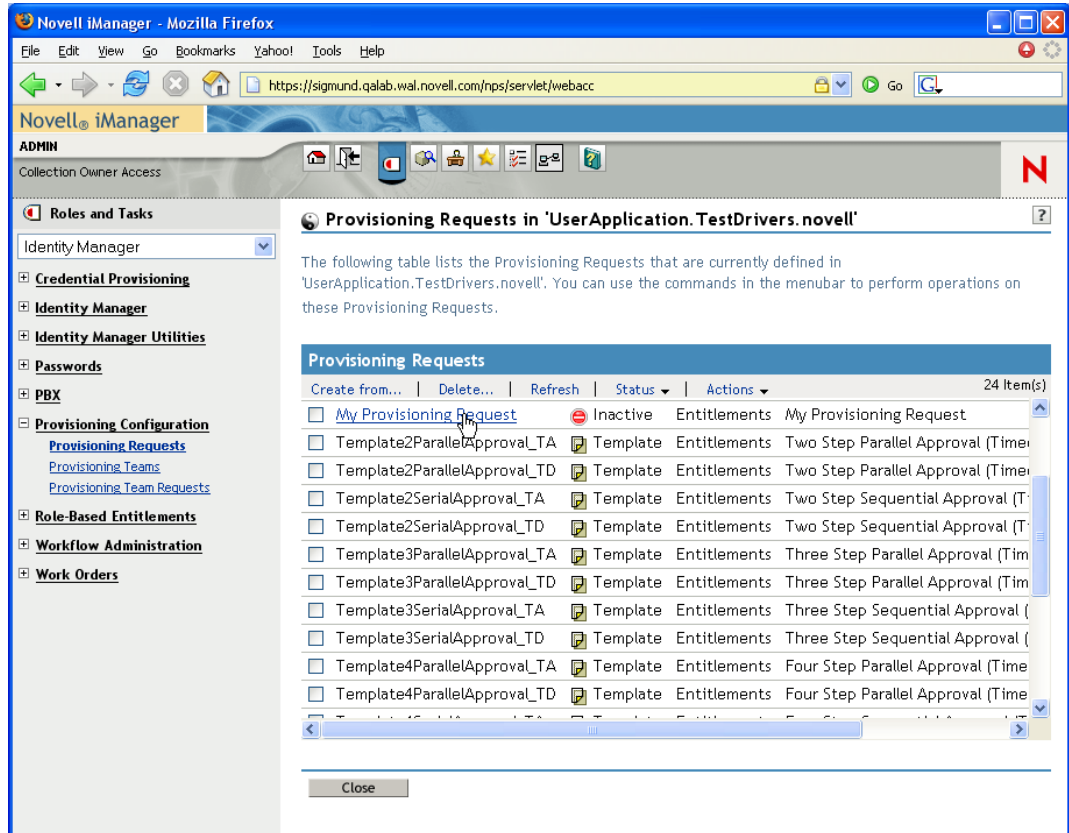
- 3 Type a common name for the new object in the *Name* field.
- 4 For each language you want to support in your application, type the localized text in the *Display Name* and *Description* fields under *Provisioning Request Localized Strings*. This text is used to identify the provisioning request throughout the User Application.
- 5 To add a new language to the list, click *Add*, then select the desired language.  
By default, a newly created provisioning request supports only English.
- 6 Click *Next*.
- 7 Specify the provisioned resource for the request definition, as described in “[Specifying the Provisioned Resource](#)” on page 309.
- 8 Configure the activities for the workflow associated with the request definition, as described in “[Configuring the Workflow Activities](#)” on page 312.
- 9 Specify the access rights for the request definition, as described in “[Specifying the Access Rights for the Provisioning Request](#)” on page 322.
- 10 Specify the initial status for the request definition, as described in “[Specifying the Initial Status of the Provisioning Request](#)” on page 323.

11 Review your settings, then click *Finish*.



To edit an existing provisioning request:

- 1 Click the name of the provisioning request in the Provisioning Request Configuration panel.



You are not permitted to edit a provisioning request that is a template. Request definitions that have a status of Template do not display hypertext links because they are read only.

If you have a large number of request definitions, you might want to sort the list by a particular column, such as the *Name* or *Description*. To sort by a particular column, click the column heading.

- 2 For each language you want to support in your application, click the check box beside the language in the list under *Provisioning Request Localized Strings*, then type the localized text in the *Display Name* and *Description* fields. This text is used to identify the provisioning request throughout the User Application.
- 3 To add a new language to the list, click *Add*, then select the desired language.  
By default, a newly created provisioning request supports only English.
- 4 Click *Next*.
- 5 Specify the provisioned resource for the request definition, as described in “[Specifying the Provisioned Resource](#)” on page 309.
- 6 Configure the activities for the workflow associated with the request definition, as described in “[Configuring the Workflow Activities](#)” on page 312.
- 7 Specify the access rights for the request definition, as described in “[Specifying the Access Rights for the Provisioning Request](#)” on page 322.
- 8 Specify the initial status for the request definition, as described in “[Specifying the Initial Status of the Provisioning Request](#)” on page 323.



9 Review your settings, then click *Finish*.

## Specifying the Provisioned Resource

This section provides instructions for specifying a provisioned resource that is based on an entitlement. It does not provide conceptual information about entitlements or instructions for creating and using entitlements.

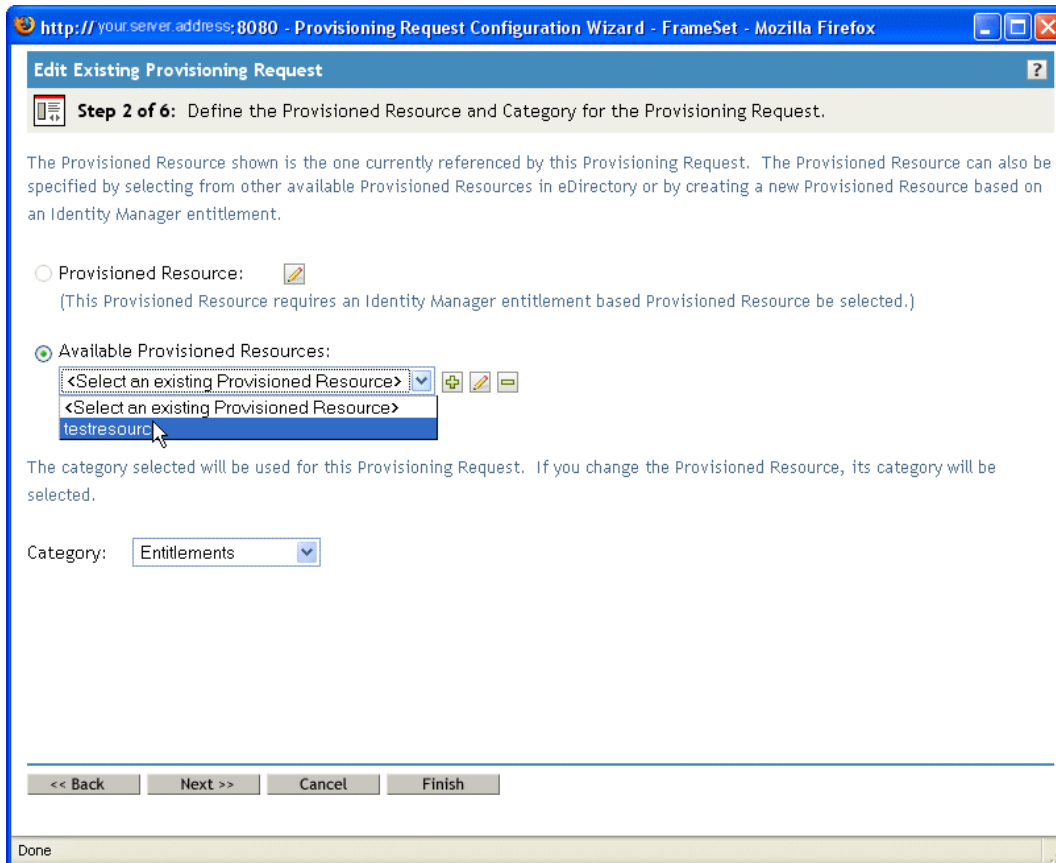
For complete details on entitlements, see the *Novell Identity Manager: Administration Guide*.

To specify the provisioned resource:

- 1 To use the target that is currently associated with the request definition, select *Provisioned resource*.

*Provisioned resource* is selected by default if you're editing a request definition that refers to a valid resource. If you're defining a new provisioning request, this option is not selected.

- 2 To bind the request definition to another resource that was previously defined within the currently selected driver, select *Available provisioned resources*, then pick a target from the drop-down list.



If the request definition was bound to a resource that is not an entitlement, you are not permitted to change the resource.

- 3 Select a category for the provisioned resource definition in the *Category* drop-down list.

The category defaults to the category for the currently selected provisioned resource. Whenever you change the provisioned resource, the category for the request definition is also changed to match the category for the resource. If you want to assign a different category to the request definition, select that category in the *Category* drop-down list.

- 4 To create a new resource based on an Identity Manager entitlement, click the + icon.



To edit an existing resource, click the pen icon.



To define the characteristics of the resource:

- 4a Specify the name for the resource in the *Name (CN)* field.
  - 4b Select a category for the resource in the *Category* drop-down list.
  - 4c Specify the entitlement in the *Entitlement* field.
  - 4d For each language you want to support in your application, click the check box beside the language in the list under *Provisioned Resource Localized Strings*, then type the localized text in the *Display Name* and *Description* fields. This text is used to identify the provisioning resource throughout the User Application.
  - 4e To add a new language to the list, click *Add*, then select the desired language.
- By default, a newly created provisioning resource supports only English.

https://sigmund.qalab.wal.novell.com - Provisioned Resource Wizard - FrameSet - Mozilla Firefox

Create New Provisioned Resource

Step 1 of 3: Edit general Provisioned Resource information.

Enter the name for the new Provisioned Resource, select its category and select its associated Identity Management entitlement. Enter the display names and descriptions for the defined languages. English will be displayed for undefined languages.

Name (CN): MyResource

Category: Entitlements

Entitlement: IDVAULT.ValueAdder1.TestDrivers.novell

Provisioned Resource Localized Strings

Add... | Delete...

Language	Display name	Description
<input checked="" type="checkbox"/> English	MyResource	This is my resource.

<< Back   Next >>   Cancel   Finish

- 5 Click *Next*.

The Provisioned Resource wizard displays a page to allow you to provide data for any parameters required for the entitlement.

https://sigmund.qalab.wal.novell.com - Provisioned Resource Wizard - FrameSet - Mozilla Firefox

### Create New Provisioned Resource

**Step 2 of 3:** Provide the necessary data to configure the Provisioned Resource.

Identity Manager Entitlement:  
Name: **IDVAULT**  
Display name: **ID Vault value set**  
Description: **manage id vault attributes**

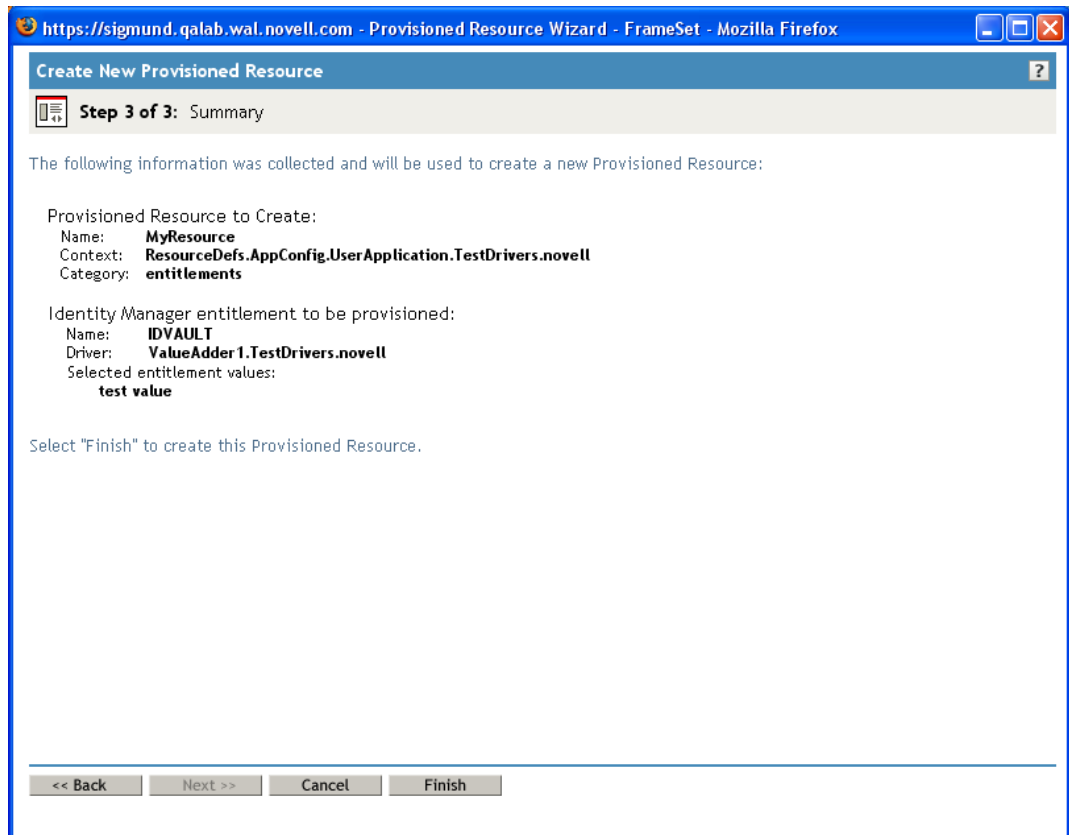
This entitlement requires that a single value be specified. The value must be entered below.

Value:

<< Back   Next >>   Cancel   Finish

6 If the entitlement does not require any entitlement parameters, click *Next*.

The Create New Provisioned Resource wizard displays the Summary page, which provides information about the resource you're defining.

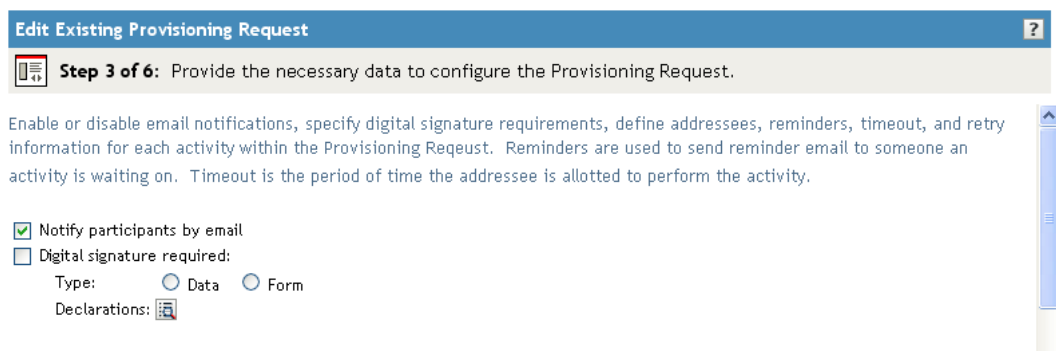


7 Click *Finish*.

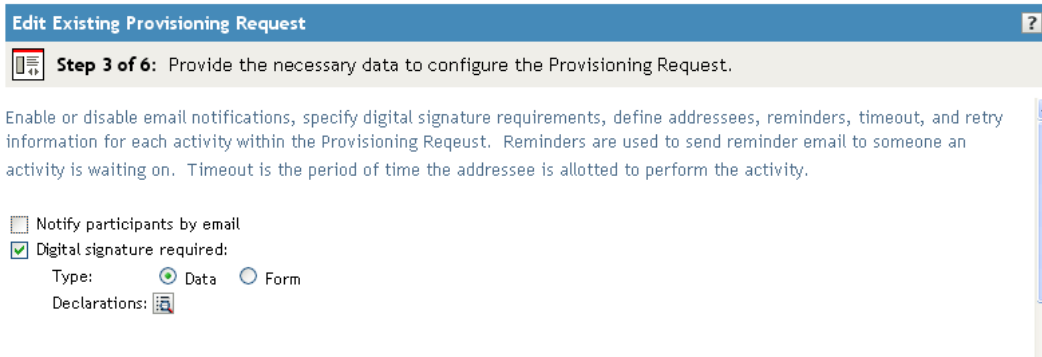
## Configuring the Workflow Activities

To configure the activities for the associated workflow:

- 1 Specify whether you want to enable e-mail notifications for the workflow by selecting or deselecting the *Notify participants by e-mail* check box.



- 2 Specify whether a digital signature is required to initiate the provisioning request by selecting or deselecting the *Digital signature required* check box.



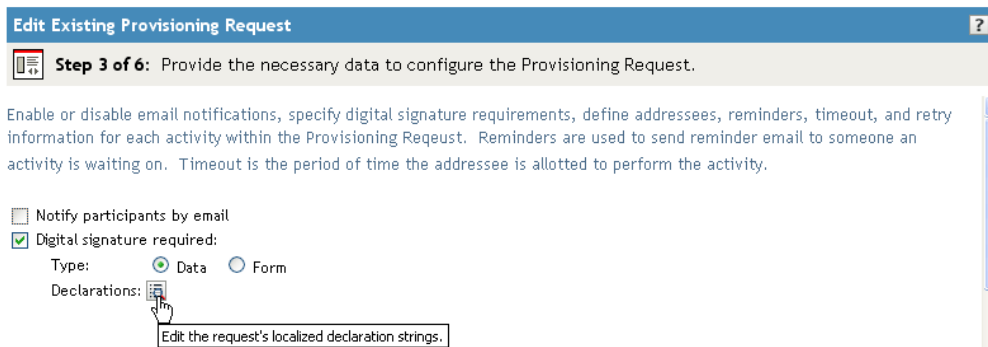
- 2a If you enable the *Digital signature required* check box, specify whether the digital signature will use data or form as its type:
- ◆ *Data* specifies that the XML signature serve as the user agreement. When Data is selected, the XML data is written to the audit log.
  - ◆ *Form* specifies that a PDF document that includes the digital signature declaration be generated. This document serves as the user agreement. The user can preview the generated PDF document before submitting a request or approval. When Form is selected, the PDF document (encapsulated in XML) is written to the audit log.

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**WARNING:** You must use Novell Audit (or Sentinel) to preserve documents that you digitally sign. Digital signature documents are not stored in the User Application database, but are stored in the logging database. You must enable logging to preserve these documents.

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- 2b If you enable the *Digital signature required* check box, you also need to specify a digital signature confirmation string. To do this, click the *Declarations* icon.



Type the signature confirmation string, then click *OK*.


- 3 (Optional) For each workflow activity, change the display label by clicking the icon beside the name of the activity (in this case, *Manager Approval*).

The screenshot shows a web browser window with the URL `https://sigmund.qalab.wal.novell.com - Provisioning Request Configuration Wizard - FrameSet - Mozilla Firefox`. The page title is "Create New Provisioning Request".

**Step 3 of 6:** Provide the necessary data to configure the Provisioning Request.

Enable or disable email notifications, specify digital signature requirements, define addressees, reminders, timeout, and retry information for each activity within the Provisioning Request. Reminders are used to send reminder email to someone an activity is waiting on. Timeout is the period of time the addressee is allotted to perform the activity.

Notify participants by email  
 Digital signature required:  
Type:  Data  Form  
Declarations:

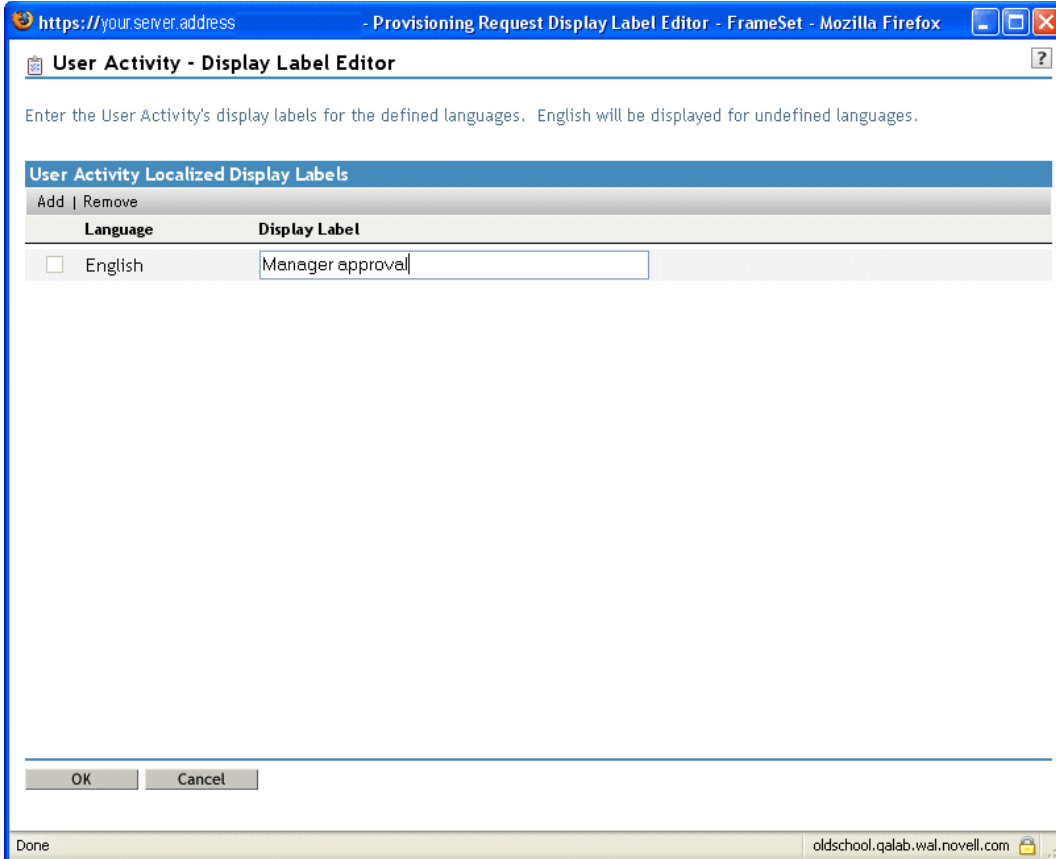
**Manager Approval**  Edit this activity's localized display labels.

Reminder email:   
 Notification email:

Digital signature required:   
Type:  Data  Form  
Declarations: <None defined>

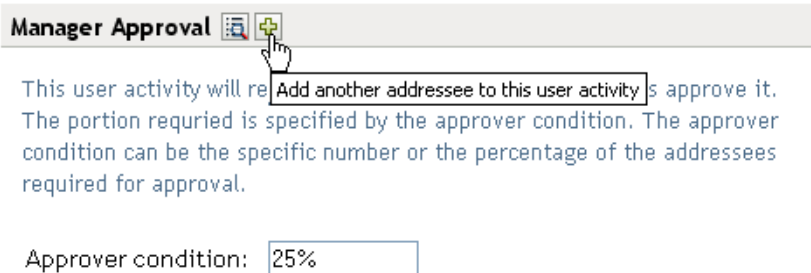
Addressee:  
 Expression: Recipient Manager   
 DN:

Type the display label in the *Display Label* field, then click *OK*.



The default display labels (First approval, Second approval, and so on) suggest that approvals are processed sequentially. For parallel flows, you might want to specify labels that do not imply sequential processing. For example, you might want to assign labels such as One of Three Parallel Approvals, Two of Three Parallel Approvals, and so on.



- 4 (Optional) For each workflow activity that supports quorums or multiple addressees, add additional addressees by clicking the *Add another addressee to this user activity* icon beside the name of the activity.

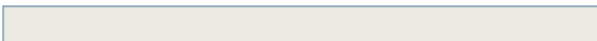




When you click this button, a new Addressee section is presented on the page. You can use the controls in this section to define an expression or DN for the addressee (as described in the next

step in this procedure). To delete the addressee, you can click the minus sign next to the addressee:

Addressee: 

Expression: Recipient  Manager 

DN:   

(e.g., CN=Admin,O=Novell)

**5** For each workflow activity, also provide the following information:

Field	Description
Reminder email	<p>Indicates whether reminder e-mail messages should be sent for this activity.</p> <p>Click the <i>Edit this activity's reminder email</i> icon to configure reminder notifications. Specify these settings:</p> <ul style="list-style-type: none"> <li>◆ <i>Start</i> specifies when to send the first reminder. The start value is an offset from the time of the first assignment associated with the activity.</li> <li>◆ <i>Interval</i> specifies how often to send reminders after the first reminder has been sent.</li> <li>◆ <i>Email Template</i> specifies the language-independent name for the template to use for reminder e-mail messages. After the template name has been specified, the notification engine can determine which language-specific template to use at runtime.</li> </ul> <p>The language-independent template can have any name you like. The default template for reminder e-mail messages is called:</p> <p>Provisioning Reminder</p> <p>Each language-specific version of a template must have a suffix that provides a language code (for example, <i>_fr</i> for French, <i>_es</i> for Spanish, and so forth).</p>

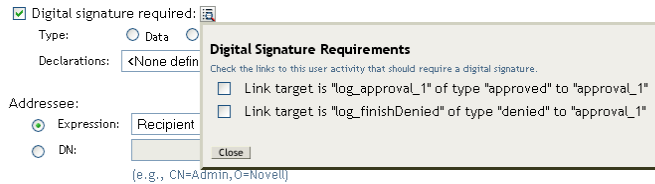


Field	Description
Notification email	<p data-bbox="525 213 1222 270">Indicates whether notification e-mail messages should be sent for this activity.</p> <p data-bbox="525 294 1176 350">Click the <i>Edit this activity's notification email</i> icon to configure notification e-mail messages. Specify these settings:</p> <ul data-bbox="551 364 1244 909" style="list-style-type: none"> <li data-bbox="551 364 1244 479">◆ <i>Email Template</i> specifies the language-independent name for the template to use for notification e-mail messages. After the template name has been specified, the notification engine can determine which language-specific template to use at runtime. The language-independent template can have any name you like. The default template for notification e-mail messages is called: <code>Provisioning Notification</code> Each language-specific version of a template must have a suffix that provides a language code (for example, <code>_fr</code> for French, <code>_es</code> for Spanish, and so forth).</li> <li data-bbox="551 737 1244 909">◆ <i>Replacement Parameters Map</i> specifies one or more substitution values for the replacement parameters used in the e-mail template. To edit an existing value, click the replacement parameter, then specify an ECMAScript expression or fixed value. To add a new substitution value, click Add, select the target parameter, then specify an expression or fixed value.</li> </ul>

Field	Description
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**Digital signature required** Indicates whether a digital signature is required to approve the request. Because each approval step might have more than one outgoing link, you need to specify whether a digital signature is required for each link.

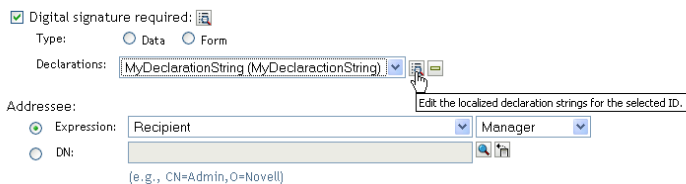
When you enable this check box, you are prompted to select the link for which a digital signature is required. Select the link, then click *Close*.



If you enable the *Digital signature required* check box, specify whether the digital signature will use data or form as its type:

- ◆ *Data* specifies that the XML signature serve as the user agreement. When Data is selected, the XML data is written to the audit log.
- ◆ *Form* specifies that a PDF document that includes the digital signature declaration be generated. This document serves as the user agreement. The user can preview the generated PDF document before submitting a request or approval. When Form is selected, the PDF document (encapsulated in XML) is written to the audit log.

If you enable the *Digital signature required* check box, you also need to specify a digital signature confirmation string. First, create an identifier for the string by selecting *Create one* in the Declarations list box. Then select the ID and click the *Declarations* icon.



Type the signature confirmation string, then click *OK*.

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Field	Description
Approver Condition	<p data-bbox="520 209 1007 235">Specifies the approver condition for quorums.</p> <p data-bbox="520 262 1248 376">When the approver type for an activity is configured to support quorums, you can set the approver condition to define the number of approvers required to approve the activity. You can specify the condition as a numeric constant or a percentage of addressees.</p> <p data-bbox="520 403 1207 457">For example, if you wanted to require a 25-percent majority, you would specify an approver condition of 25%, as shown below.</p> <p data-bbox="540 499 1238 610"><i>This user activity will require that a portion of the addressees approve it. The portion required is specified by the approver condition. The approver condition can be the specific number or the percentage of the addressees required for approval.</i></p> <p data-bbox="540 653 905 679">Approver condition: <input data-bbox="771 653 905 679" type="text" value="25%"/></p> <p data-bbox="520 749 1196 804">Alternatively, if you wanted to require approvals from two of the addressees, you would set the approver condition to 2.</p> <hr/> <p data-bbox="520 844 1245 957"><b>NOTE:</b> When quorum support is enabled for an activity, you cannot specify retry settings for the activity. Therefore, the Retry Escalation Reminder Email, Retry Attempts, Retry Interval, and Retry Addressee fields are not displayed.</p> <hr/>

Field	Description
Addressee Expression	<p>Specifies a dynamic expression that identifies the addressee for the activity. The addressee is determined at runtime, based on how the expression is evaluated.</p> <p>The first term of an addressee expression can be any of the following values:</p> <ul style="list-style-type: none"> <li>◆ Initiator</li> <li>◆ Recipient</li> <li>◆ Addressee of <i>activity-name</i></li> </ul> <p>A separate Addressee of <i>activity-name</i> term is listed in the Expression drop-down list for each activity in the workflow (except the activity you are currently configuring). The <i>activity-name</i> is the display label you specified for the activity, or the default name, if you did not specify a display label.</p> <p>The second term of an addressee expression can be either of the following values:</p> <ul style="list-style-type: none"> <li>◆ Manager</li> <li>◆ &lt;No attribute&gt;</li> </ul> <p>The Manager attribute is available automatically because it has been previously defined on the User entity in the abstraction layer. Other attributes (in addition to Manager) are available for selection if they meet the following requirements:</p> <ul style="list-style-type: none"> <li>◆ Must be defined on the User entity in the abstraction layer</li> <li>◆ Must be single-valued</li> <li>◆ Must have a DN data type</li> </ul>
Addressee DN	<p>Specifies the distinguished name for a user, group, or task group.</p> <hr/> <p><b>NOTE:</b> If you want Task Group Managers to be able to search for tasks by task group (in the My Team Tasks action in the User Application), you need to specify the task group as the addressee.</p> <hr/>
Timeout	<p>Specifies the period of time allotted for the activity to complete its processing. The timeout interval is the total time allowed for the activity, not the time allowed for each retry.</p> <p>The Timeout setting for the activity takes precedence over the Retry Attempts and Retry Interval values. Therefore, if the Timeout setting for the activity is reached before one or more of the retries have been attempted, the activity finishes processing without executing these retries. For example, if you set the timeout to 10 minutes, and define three retries with a retry interval of 5 minutes, the activity will finish after 10 minutes without attempting all of the retries. In this example, the second retry will be canceled. At the conclusion of the activity, the workflow engine will follow the link defined by the final timeout action in Designer.</p> <p>Specify a value in milliseconds, seconds, minutes, hours, or days.</p>

Field	Description
Retry Escalation Reminder Email	<p data-bbox="525 213 1256 294">Specifies whether e-mail messages should be sent to remind the current addressee of the activity that an action is required. Check this box to enable this feature.</p> <p data-bbox="525 324 1256 405">To change the retry escalation reminder notification settings for this activity, click the <i>Edit this activity's retry reminder email</i> icon to configure escalation reminder notifications. Specify these settings:</p> <ul data-bbox="551 425 1256 677" style="list-style-type: none"> <li data-bbox="551 425 1256 475">◆ <i>Start</i> specifies when to send the first reminder. The start value is an offset from the time of the retry assignment.</li> <li data-bbox="551 495 1256 546">◆ <i>Interval</i> specifies how often to send reminders after the first reminder has been sent.</li> <li data-bbox="551 566 1256 677">◆ <i>Email Template</i> specifies the language-independent name for the template to use for reminder e-mail messages. After the template name has been specified, the notification engine can determine which language-specific template to use at runtime.</li> </ul> <p data-bbox="582 697 1256 778">The language-independent template can have any name you like. The default template for reminder e-mail messages is called:</p> <p data-bbox="582 798 887 818"><code>Provisioning Reminder</code></p> <p data-bbox="582 838 1256 919">Each language-specific version of a template must have a suffix that provides a language code (for example, <code>_fr</code> for French, <code>_es</code> for Spanish, and so forth).</p>
Retry Attempts	<p data-bbox="525 939 1256 999">Specifies the number of times to retry the activity in the event that the retry interval has been reached.</p> <p data-bbox="525 1020 1256 1282">When an activity reaches the retry interval, the workflow process tries to complete the activity again, depending on the retry count specified for the activity. With each retry, the workflow process can escalate the activity to another user. In this case, the activity is reassigned to a new addressee (the user's manager, for example) to give this user an opportunity to finish the work of the activity. In the event that the last retry is executed, the activity might be marked as approved or denied, depending on how the workflow was configured.</p> <p data-bbox="525 1302 1256 1594">The Timeout setting for the activity takes precedence over the Retry Attempts and Retry Interval values. Therefore, if the Timeout setting for the activity is reached before one or more of the retries have been attempted, the activity finishes processing without executing these retries. For example, if you set the timeout to 10 minutes, and define three retries with a retry interval of 5 minutes, the activity will finish after 10 minutes without attempting all of the retries. In this example, the second retry will be canceled. At the conclusion of the activity, the workflow engine will follow the link defined by the final timeout action in Designer.</p>
Retry Interval	<p data-bbox="525 1624 1256 1766">Defines the period of time allotted for the addressee to complete the task. When the Retry Interval is reached, the workflow can optionally reassign the activity to a new addressee or try again with the original addressee. The Addressee Expression gives you control over the reassignment.</p>

Field	Description
Retry Addressee Expression	<p>Specifies a dynamic expression that identifies the user who should get this task in the event that the timeout limit has been reached.</p> <p>The retry addressee is determined at runtime, based on how the expression is evaluated.</p> <p>The first term of an addressee expression can be any of the following values:</p> <ul style="list-style-type: none"> <li>◆ Initiator</li> <li>◆ Recipient</li> <li>◆ Addressee of <i>activity-name</i></li> </ul> <p>A separate Addressee of <i>activity-name</i> term is listed in the Expression drop-down for each activity in the workflow (including the activity you are currently configuring). The <i>activity-name</i> is the display label you specified for the activity, or the default name, if you did not specify a display label.</p> <p>The second term of an addressee expression depends on how the data abstraction layer has been defined. For example, you might see the following values:</p> <ul style="list-style-type: none"> <li>◆ Manager</li> <li>◆ Group</li> <li>◆ Direct Reports</li> <li>◆ &lt;No attribute&gt;</li> </ul> <p>If you select <i>Manager</i>, each retry will escalate to a new manager at a higher level within the organization. Therefore, be sure to set the retry count to a number that is suitable for your organization. In any case, the retry count should not exceed the number of levels of management above the current addressee.</p>
Retry Addressee DN	Specifies the distinguished name for a user or group that should get this task in the event that the retry limit has been reached.

**6** When you finish configuring an activity, you might need to scroll down to see the other activities for the flow.

**7** Click *Next*.

---

**NOTE:** The number of activities you can configure varies, depending on which provisioning request definition was used as the basis for creating this definition. The number and type of entitlement parameters varies, depending on the provisioned resource associated with the request.

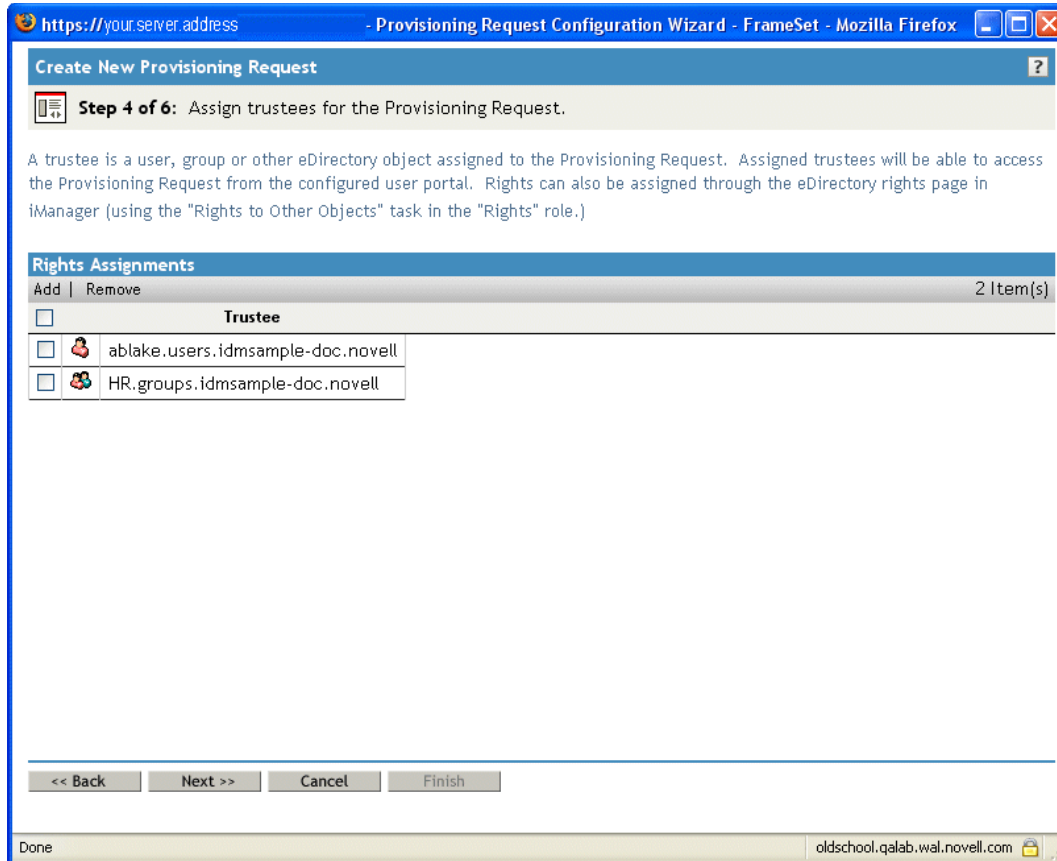
---

## Specifying the Access Rights for the Provisioning Request

To specify the access rights for a provisioning request:

**1** To add a user, group, or other eDirectory™ object to the list of trustees for this request definition, click *Add*, then select the object.

After you have added an object, it is included in the list of trustees.



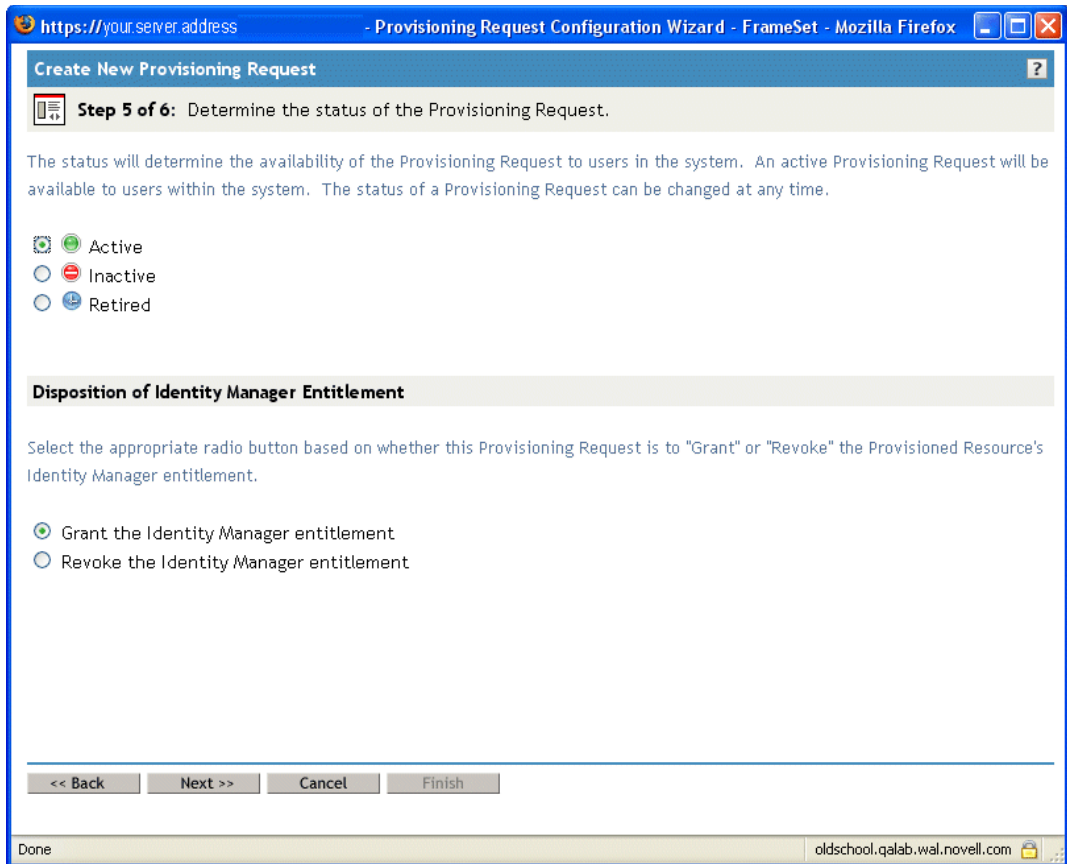
- 2 To remove a user, group, or other object, select the item in the Trustee list, then click *Remove*.
- 3 Click *Next*.

### Specifying the Initial Status of the Provisioning Request

To set the initial status of the provisioning request:

- 1 Click the button for the desired status:

Status	Description
Active	Available for use.
Inactive	Temporarily unavailable for use. This is the default.
Retired	Permanently disabled.



- 2 Click the button for the correct action (*Grant* or *Revoke*).
- 3 Click *Next*.

### 17.3.3 Deleting a Provisioning Request

To delete a provisioning request:

- 1 Select the provisioning request you want to delete by clicking the check box next to the name.  
You are not permitted to delete a provisioning request that is a template.



- 2 Click the *Delete* command in the Provisioning Request Configuration panel.

**Provisioning Requests in 'DocDriver.TestDrivers.novell'** ?

The following table lists the Provisioning Requests that are currently defined in 'DocDriver.TestDrivers.novell'. You can use the commands in the menubar to perform operations on these Provisioning Requests.

Provisioning Requests			
Create from...   Delete   Status▼   Actions▼ <span style="float: right;">43 Item(s)</span>			
<input type="checkbox"/>	Name	Status	
<input type="checkbox"/>	<a href="#">Active Directory User Account</a>	Active	The User Account entitlement grants or denies an a
<input type="checkbox"/>	<a href="#">Job Title Change</a>	Active	Single approval, Job title change with notification
<input checked="" type="checkbox"/>	<a href="#">My Provisioning Request</a>	Active	This is my provisioning request.
<input type="checkbox"/>	<a href="#">Office Change Request</a>	Active	Office Change Request
<input type="checkbox"/>	<a href="#">Oracle access</a>	Active	Oracle access request via Entitlement Double Appro
<input type="checkbox"/>	<a href="#">Request for Cellphone</a>	Active	Request for Cellphone, no approval
<input type="checkbox"/>	<a href="#">Sample 1</a>	Active	Title change with hard coded values
<input type="checkbox"/>	<a href="#">Sample 12</a>	Active	Title change with hard coded values with hard c

Close

## 17.3.4 Changing the Status of an Existing Provisioning Request

To change the status of an existing provisioning request:

- 1 Select the provisioning request for which you want to change status by clicking the check box beside the name.
- 2 Click the *Change Status* command in the Provisioning Request Configuration panel.

**Provisioning Requests in 'DocDriver.TestDrivers.novell'** ?

The following table lists the Provisioning Requests that are currently defined in 'DocDriver.TestDrivers.novell'. You can use the commands in the menubar to perform operations on these Provisioning Requests.

Provisioning Requests			
Create from...   Delete   Status▼   Actions▼ <span style="float: right;">43 Item(s)</span>			
<input type="checkbox"/>	Name	Status	
<input type="checkbox"/>	<a href="#">Active Directory User Account</a>	Active	account entitlement grants or denies an a
<input type="checkbox"/>	<a href="#">Job Title Change</a>	Active	approval, Job title change with notification
<input checked="" type="checkbox"/>	<a href="#">My Provisioning Request</a>	Active	provisioning request.
<input type="checkbox"/>	<a href="#">Office Change Request</a>	Active	Office Change Request
<input type="checkbox"/>	<a href="#">Oracle access</a>	Active	Oracle access request via Entitlement Double Appro
<input type="checkbox"/>	<a href="#">Request for Cellphone</a>	Active	Request for Cellphone, no approval
<input type="checkbox"/>	<a href="#">Sample 1</a>	Active	Title change with hard coded values
<input type="checkbox"/>	<a href="#">Sample 12</a>	Active	Title change with hard coded values with hard c

Change Status  
 Define Rights  
 Define Rights with iManager  
 Select User Application Driver

Close

- 3 Click the status in the *Status* menu:

Status	Description
Active	Available for use.
Inactive	Temporarily unavailable for use.
Retired	Permanently disabled.

- 4 Click the button for the correct action (*Grant* or *Revoke*).
- 5 Click *Finish*.

### 17.3.5 Defining Rights on an Existing Provisioning Request

To define rights on an existing provisioning request:

- 1 Select the provisioning request for which you want to define rights by clicking the check box beside the name.
- 2 Click the *Actions* command in the Provisioning Request Configuration panel.
- 3 Click the *Define Rights* command on the *Actions* menu.

**Provisioning Requests in 'DocDriver.TestDrivers.novell'** ?

The following table lists the Provisioning Requests that are currently defined in 'DocDriver.TestDrivers.novell'. You can use the commands in the menubar to perform operations on these Provisioning Requests.

Provisioning Requests				26 Item(s)
<input type="checkbox"/>	Name	Status	Actions	Description
<input type="checkbox"/>	<a href="#">My Provisioning Request</a>	Active	<ul style="list-style-type: none"> <li>Change Status</li> <li><b>Define Rights</b></li> <li>Define Rights with iManager</li> <li>Select User Application Driver</li> </ul>	Provisioning Request
<input type="checkbox"/>	<a href="#">Sample 1</a>	Active		Request with hard coded values
<input type="checkbox"/>	<a href="#">Sample 10</a>	Active		Request with hard coded values
<input type="checkbox"/>	<a href="#">Sample 2</a>	Active		Request with IDVault and XPATH examples
<input type="checkbox"/>	<a href="#">Sample 3</a>	Inactive	Software	Assignment of a laptop computer - Related Item
<input type="checkbox"/>	<a href="#">Sample 4</a>	Active	Software	Entitlement with hard coded values
<input type="checkbox"/>	<a href="#">Sample 5</a>	Active	Software	Entitlement with timer example
<input type="checkbox"/>	<a href="#">Sample 6</a>	Active	Software	Title Change
<input type="checkbox"/>	<a href="#">Sample 7</a>	Active	Software	Single approval of title change with many data
<input type="checkbox"/>	<a href="#">Sample 8</a>	Active	Category1	Eight sample
<input type="checkbox"/>	<a href="#">Sample 9</a>	Active	Human Resources	Nine sample
<input type="checkbox"/>	<a href="#">tdbtest</a>	Active	Software	this is a test
<input type="checkbox"/>	<a href="#">tdbtestOneStepApproval</a>	Active	Entitlements	TDB One Step Approval (Timeout Approves)
<input type="checkbox"/>	<a href="#">Template2ParallelApproval_TA</a>	Template	Entitlements	Two Step Parallel Approval (Timeout Approves)
<input type="checkbox"/>	<a href="#">Template2ParallelApproval_TD</a>	Template	Entitlements	Two Step Parallel Approval (Timeout Deny)
<input type="checkbox"/>	<a href="#">Template2SerialApproval_TA</a>	Template	Entitlements	Two Step Sequential Approval (Timeout Approves)

- 4 Follow the steps described in “[Specifying the Access Rights for the Provisioning Request](#)” on [page 322](#).

To define rights on a provisioning request with iManager:

- 1** Select the provisioning request for which you want to define rights by clicking the check box beside the name.
- 2** Click the *Actions* command in the Provisioning Request Configuration panel.
- 3** Click the *Define Rights with iManager* command on the *Actions* menu.



This section provides instructions for managing provisioning workflows at runtime. It also provides instructions for configuring e-mail notification for provisioning workflows.

Topics include:

- ♦ [Section 18.1, “About the Workflow Administration Plug-in,” on page 329](#)
- ♦ [Section 18.2, “Managing Workflows,” on page 329](#)
- ♦ [Section 18.3, “Configuring the E-Mail Server,” on page 337](#)
- ♦ [Section 18.4, “Working with E-Mail Templates,” on page 338](#)

## 18.1 About the Workflow Administration Plug-in

The Workflow Administration plug-in to iManager provides a browser-based interface that lets you view the status of workflow processes, reassign activities within a workflow, or terminate a workflow in the event that it is stopped and cannot be restarted.

You can find the Workflow Administration plug-in in the Identity Manager category in iManager. The plug-in includes the *Workflows* task in the *Workflow Administration* role.

The Workflow Administration role also includes the *Email Templates* and *Email Server Options* tasks. These tasks are shortcuts to other tasks listed under the Passwords role.

The Workflows task comprises the panels listed in [Table 18-1](#).

**Table 18-1** *Workflows Task: Panels*

Panel	Description
Workflows	<p>Provides the primary user interface for administering provisioning workflows. The interface lists workflows currently being processed and lets you perform various actions on these workflows.</p> <p>When you first start the Workflows task, the Workflows panel requires that you select an Identity Manager User Application driver. The driver points to a workflow server. You need to select a driver before you can log in to the server and begin workflow administration.</p> <p>When you have selected a driver, you can specify search criteria for selecting the workflows to manage.</p>
Workflow Detail	<p>Provides a read-only user interface for viewing the details about a specific workflow.</p>

## 18.2 Managing Workflows

This section includes procedures for managing provisioning workflows using the Workflow Administration plug-in:

- ♦ [Section 18.2.1, “Connecting to a Workflow Server,” on page 330](#)

- ◆ Section 18.2.2, “Finding Workflows that Match Search Criteria,” on page 332
- ◆ Section 18.2.3, “Controlling the Active Workflows Display,” on page 333
- ◆ Section 18.2.4, “Terminating a Workflow Instance,” on page 334
- ◆ Section 18.2.5, “Viewing Details about a Workflow Instance,” on page 334
- ◆ Section 18.2.6, “Reassigning a Workflow Instance,” on page 334
- ◆ Section 18.2.7, “Managing Workflow Processes in a Cluster,” on page 335

## 18.2.1 Connecting to a Workflow Server

Before you can begin managing workflows, you need to connect to a workflow server. If the User Application driver is bound to a single workflow server, you can simply specify the name of the driver to use. If the driver is associated with multiple workflow servers, you need to select the target workflow server.

To connect to a workflow server:

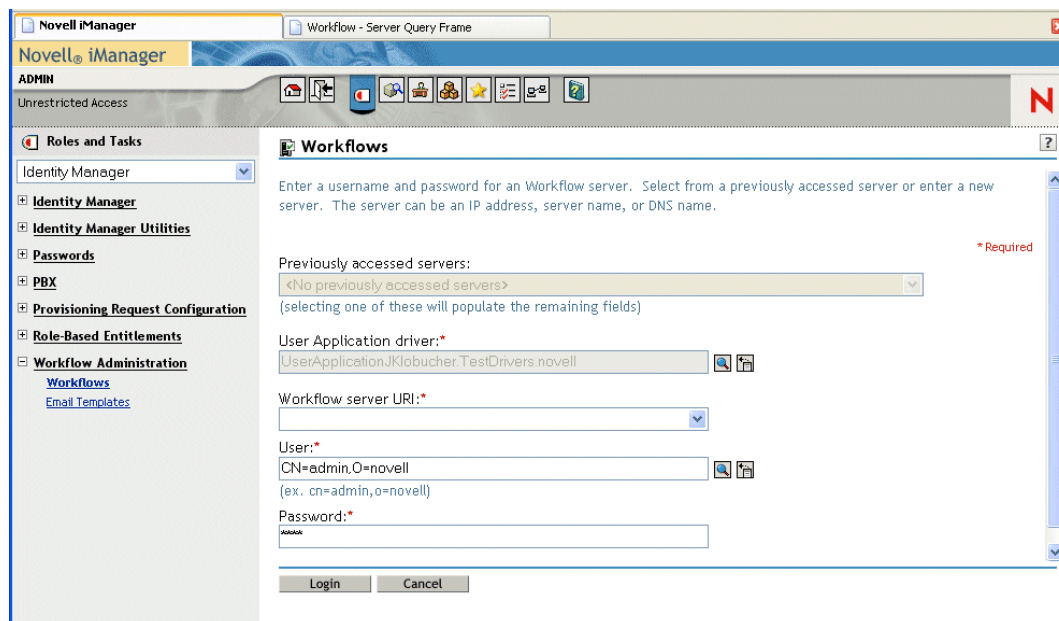
- 1 Select the Identity Manager category in iManager.
- 2 Open the *Workflow Administration* role.
- 3 Click the *Workflows* task.

iManager displays the Workflows panel.

The screenshot shows the Novell iManager interface. On the left is a navigation pane with a tree view containing 'Roles and Tasks', 'Identity Manager', 'Identity Manager Utilities', 'Passwords', 'PBX', 'Provisioning Request Configuration', 'Role-Based Entitlements', and 'Workflow Administration'. Under 'Workflow Administration', 'Workflows' is selected. The main content area is titled 'Workflows' and contains the following text: 'Enter a username and password for an Workflow server. Select from a previously accessed server or enter a new server. The server can be an IP address, server name, or DNS name.' Below this is a 'Previously accessed servers:' dropdown menu with the text '<No previously accessed servers>' and a red asterisk '\* Required' to its right. A note below the dropdown says '(selecting one of these will populate the remaining fields)'. There are three required fields: 'User Application driver:' (with a search icon), 'Workflow server URI:' (with a dropdown arrow), and 'User:' (with a search icon). The 'User' field contains the text 'CN=admin,O=novell' and a note '(ex. cn=admin,o=novell)'. At the bottom are 'Login' and 'Cancel' buttons.

- 4 If you accessed the target workflow server previously, you can select the server from the *Previously accessed servers* drop-down list.  
iManager fills in the remaining fields on the panel.
- 5 If you have not yet accessed a workflow server, specify the driver name in the *User Application Driver* field, then click *OK*.

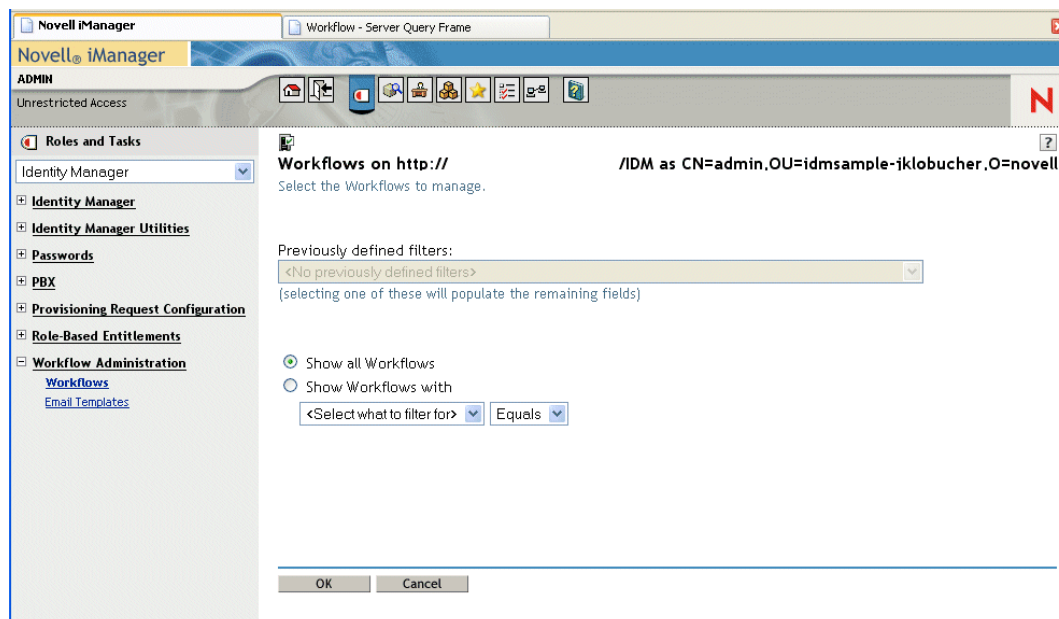
iManager fills in the *Workflow server URI* and *User* fields.



6 Type the password for the user in the *Password* field.

7 Click *Login*.

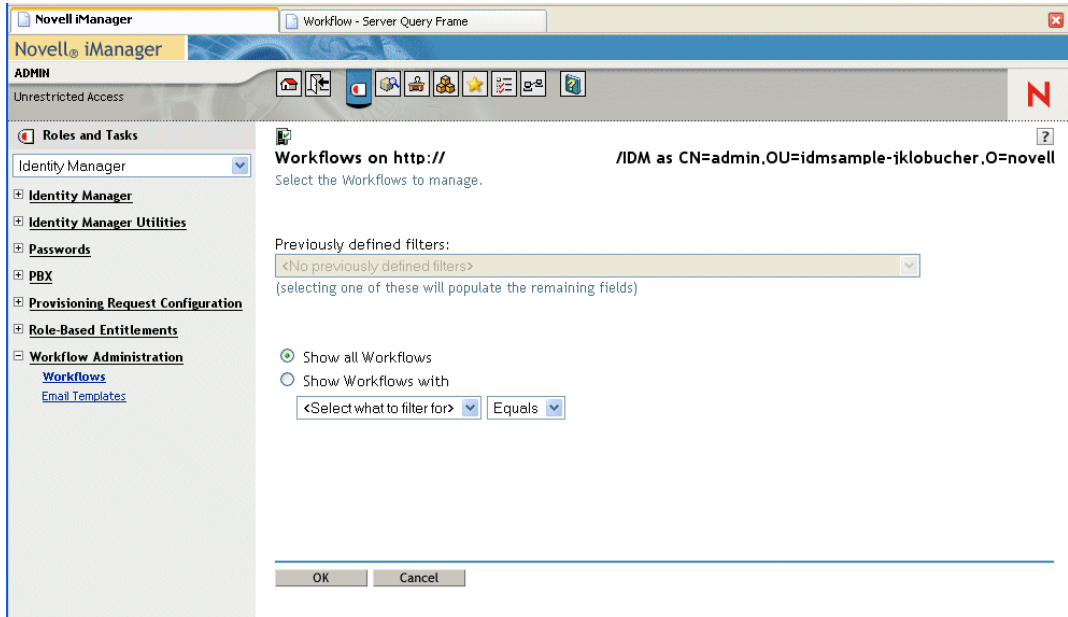
The Workflow Administration plug-in displays a page that allows you to specify a filter for finding workflows:



## 18.2.2 Finding Workflows that Match Search Criteria

If the target workflow server is running a large number of workflow processes, you might want to filter the list of workflows you see in iManager. To do this, you can specify search criteria.

- 1 Select *Show Workflows with*.



By default, *Show all Workflows* is selected. Do not change the default if you want to see the complete list of workflows on the server.

- 2 Select the attribute for which you want to specify criteria.

Attribute	Description
Creation time	Time that the workflow was initiated.
Initiator	Username of the requestor.
Recipient	Username of the recipient.
Process Status	Status of the workflow process as a whole (Completed, Running, or Terminated).
Approval status	Status of the approval process (Approved, Denied, or Retracted).
Entitlement status	Status of the entitlement initiated by the provisioning request (Error, Fatal, Success, Unknown, or Warning).

- 3 Select an operator:

Operator	Comment
Equals	Supported for all attributes.
Before	Only supported for the Creation time attribute.



Operator	Comment
After	Only supported for the Creation time attribute.
Between	Only supported for the Creation time attribute.

- 4 Specify a value in the field below the attribute and operator.

For *Creation time*, you can use the *Date and time* control to select the value. For *Initiator* and *Recipient*, you can use *Object History* or *Object Selector* to specify a value. For all other attributes, select the value from the drop-down list.

- 5 Click *OK*.

iManager displays the workflows you have selected on the Workflows panel.

**Changing the target server and filter.** When you have selected a workflow server, this selection remains in effect for the duration of your iManager session, unless you select a new server. To select a new server, click the *Actions* command, then choose *Select Server* from the *Actions* menu.

To specify different search criteria, choose *Define Filter* on the *Actions* menu.

### 18.2.3 Controlling the Active Workflows Display

The Workflows panel lists the workflows that match the search criteria you specified. In addition to filtering the list, you can control the display. For example, you can specify how often to refresh the list and sort the list on a particular column.

#### Refreshing the List of Workflows

When the workflow server is very busy, the list of active workflows can change very frequently. In this case, you should refresh the list of active workflows running on the server.

- 1 Click the *Refresh* command in the Workflows panel.
- 2 Specify the refresh interval you want to use by selecting one of these options from the *Refresh* menu:
  - ◆ Refresh Off
  - ◆ Refresh Now
  - ◆ 10 seconds
  - ◆ 30 seconds
  - ◆ 60 seconds
  - ◆ 5 minutes
- 3 Click *OK*.

#### Sorting the List of Workflows

If you have a large number of request definitions, you might want to sort the list by a particular column, such as *Name* or *Description*.

- 1 Click the heading for the sort column.

## 18.2.4 Terminating a Workflow Instance

If you do not want a workflow instance to continue its processing, you can terminate the workflow.

- 1 Select the workflow in the Workflows panel by clicking the check box next to the workflow name.
- 2 Click the *Terminate* command in the Workflows panel.

## 18.2.5 Viewing Details about a Workflow Instance

When you have displayed a set of running workflows on a particular server, you can select a workflow instance to see more details about the running process.

---

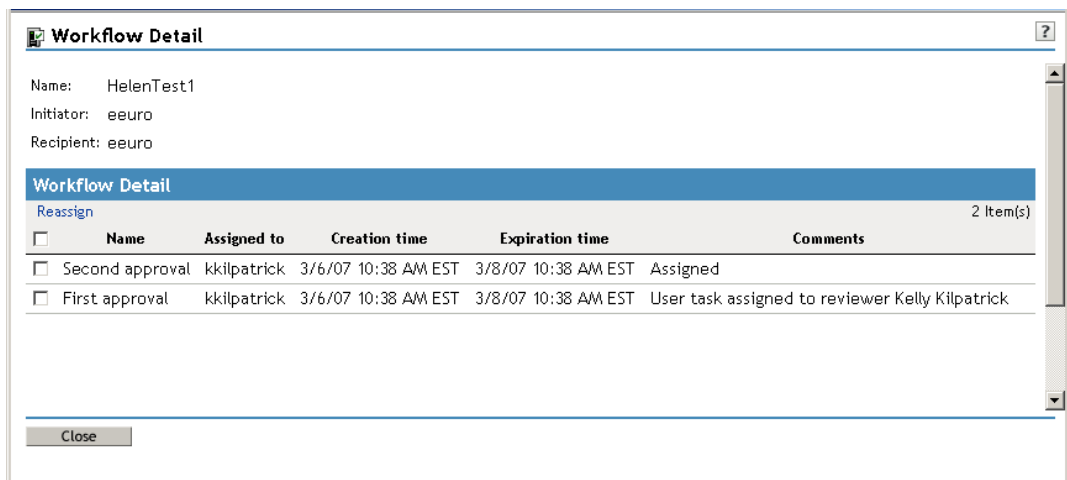
**NOTE:** If a workflow instance uses a serial processing design pattern, the display shows a single activity as current because only one user can act on the work item at any point in time. However, if the workflow handles parallel processing and branching, there might be multiple current activities for a workflow instance.

---

To view details about a particular workflow instance:

- 1 Click the name of the workflow instance in the Workflows panel.

iManager displays the Workflow Detail panel.

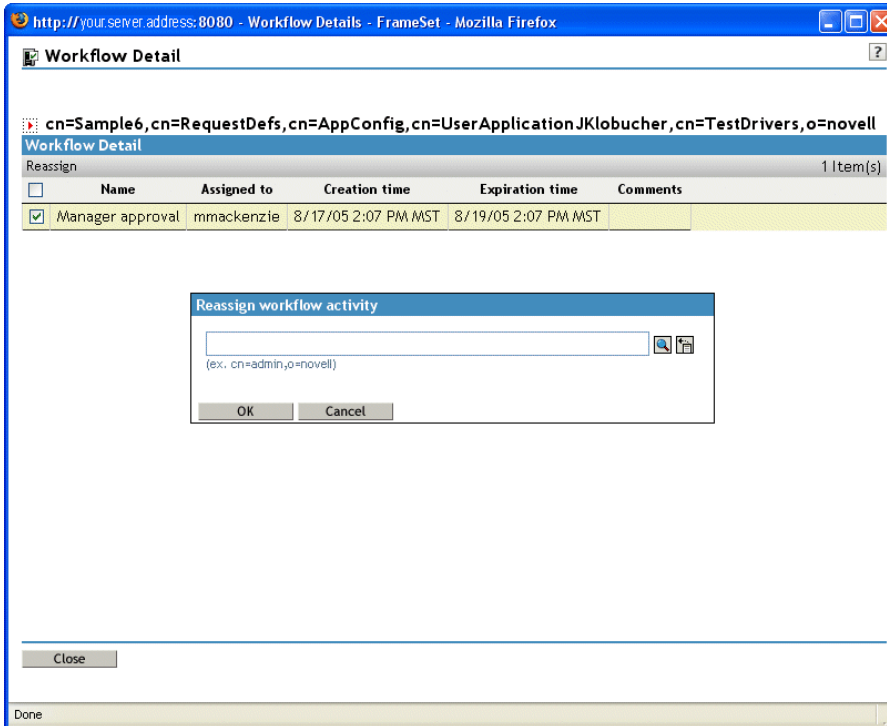


## 18.2.6 Reassigning a Workflow Instance

If a workflow instance has stopped and cannot be restarted, you can reassign the work item to another user or group.

- 1 Select the current activity associated with the workflow by clicking the check box next to the name in the Workflow Detail panel.

- 2 Click the *Reassign* command in the Workflow Detail panel.



- 3 Select the user or group to which you want to reassign the work item.

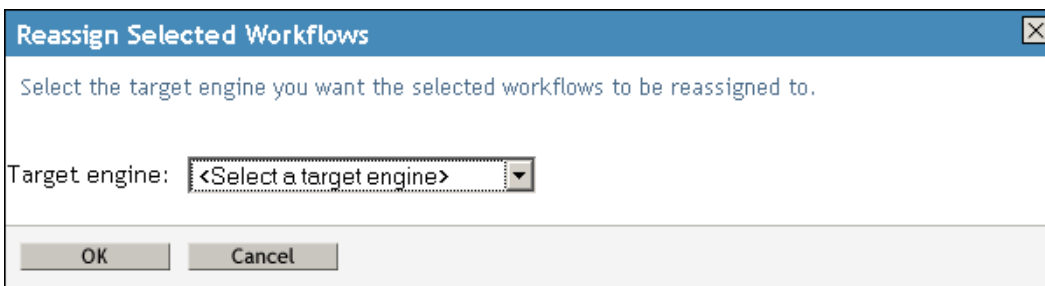
## 18.2.7 Managing Workflow Processes in a Cluster

You can use the Workflows screen to reassign processes from one workflow engine to another. For example, you could use this feature to reassign processes back to a failed workflow engine when the workflow engine is brought back online, or you could redistribute processes to other engines when an engine is permanently removed from the cluster.

The source engine(s) must be in a SHUTDOWN or TIMEDOUT state. The target engine must be restarted in order to restart the processes that were reassigned to that engine.

### Reassigning a Process from One Workflow Engine to Another

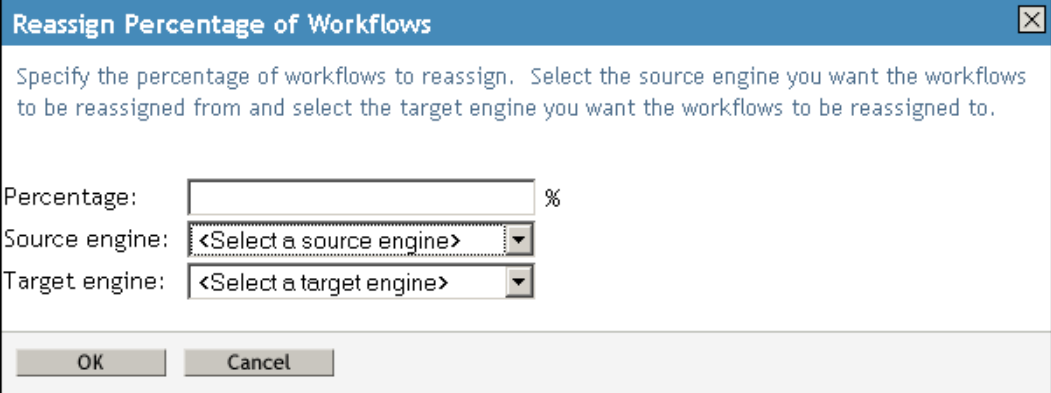
- 1 In the Workflows panel, select the workflow that you would like to reassign by clicking the check box next to the workflow name.
- 2 Select *Actions > Reassign*.



- 3 Select the workflow engine to which you want to reassign the workflow process from the *Target Engine* list.
- 4 Click *OK*.

### Reassigning a Percentage of Processes from One Workflow Engine to Another

- 1 In the Workflows panel, select the workflow that you would like to reassign by clicking the check box next to the workflow name.
- 2 Select *Actions > Reassign Percentage*.



Reassign Percentage of Workflows

Specify the percentage of workflows to reassign. Select the source engine you want the workflows to be reassigned from and select the target engine you want the workflows to be reassigned to.

Percentage:  %

Source engine:

Target engine:

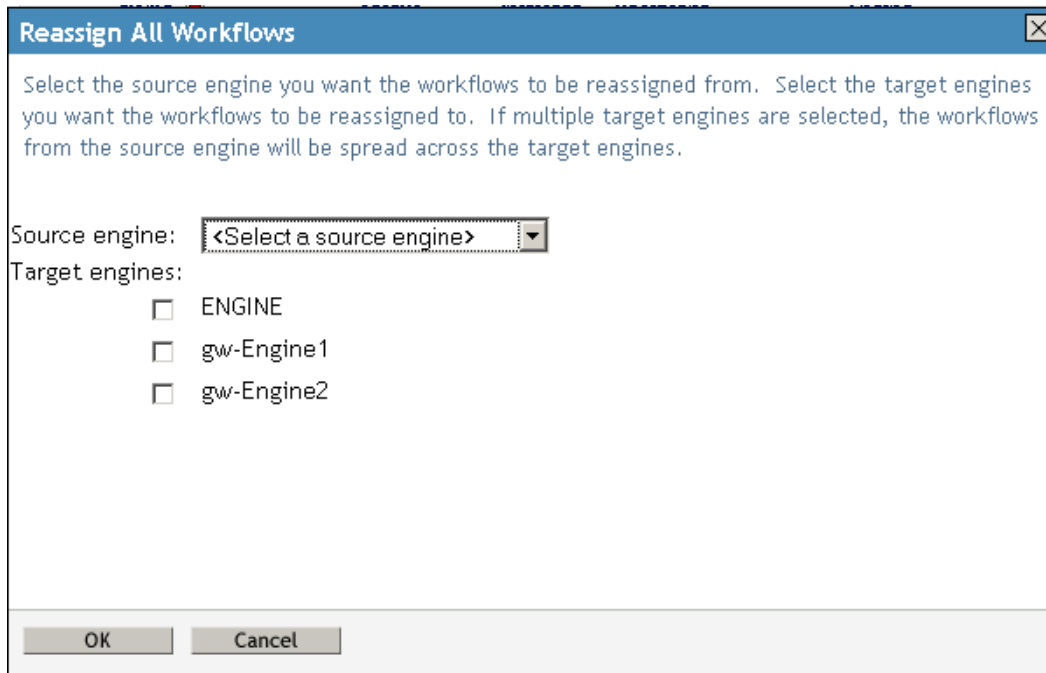
OK Cancel

- 3 In the *Percentage* field, type the percentage of workflow processes that you would like to reassign from one workflow engine to another.
- 4 Use the *Source engine* list to select the workflow engine from which you want to reassign processes.
- 5 Use the *Target engine* field to select the workflow engine to which you want to reassign processes.
- 6 Click *OK*.

### Reassigning All Processes from One Workflow Engine to Another

- 1 In the Workflows panel, select the workflow that you would like to reassign by clicking the check box next to the workflow name.

## 2 Select Actions > Reassign All.



- 3 Use the *Source engine* list to select the workflow engine from which you want to reassign processes.
- 4 Select the workflow engines to which you would like to reassign processes by clicking the check box next to the name of the workflow engine.  
If you select multiple target engines, the processes from the source engine will be evenly distributed to the target engine.
- 5 Click *OK*.

## 18.3 Configuring the E-Mail Server

A workflow process often sends e-mail notifications at various points in the course of its execution. For example, an e-mail might be sent when a user assigns a workflow activity to a new addressee.

Before you can take advantage of the e-mail notification capabilities of Identity Manager, you need to configure the SMTP e-mail server. To do this, you need to use the *Email Server Options* task within the Workflow Administration role in iManager.

---

**NOTE:** This task is a shortcut to the *Email Server Options* task under the Passwords role.

---

To configure the e-mail server:

- 1 Select the Identity Manager category in iManager.
- 2 Open the *Workflow Administration* role.
- 3 Click on the *Email Server Options* task.

iManager displays the Email Server Options panel.

The screenshot shows the 'Email Server Options' configuration window in Novell iManager. The window title is 'Novell iManager' and 'ADMIN'. The left sidebar shows a tree view with 'Email Server Options' selected. The main area contains the following fields and options:

- Host Name:** A text input field containing 'mail.novell.com'. Below it is a note: '(for example: mail.novell.com or 137.89.119.5)'.  
**From:** A text input field containing 'spitfire@novell.com'. Below it is a note: '(for example: admin@novell.com)'.  
 **Authenticate to server using credentials:**  
**User Name:** An empty text input field.  
**Password:** An empty text input field.  
**Retype password:** An empty text input field.

At the bottom of the window are 'OK' and 'Cancel' buttons.

4 Type the name (or IP address) of the host server in the *Host Name* field.

5 Type the e-mail address for the sender in the *From* field.

When the recipient opens the e-mail, this text is displayed in the *From* field of the e-mail header. Depending on your mail server settings, the text in this field might need to match a valid sender in the system in order to allow the mail server to do reverse lookups or authentication. An example is `helpdesk@company.com` instead of descriptive text such as The Password Administrator.

6 If your server requires authentication before sending e-mail, select the *Authenticate to server using credentials* check box and specify the username and password.

7 When you are finished, click *OK*.

## 18.4 Working with E-Mail Templates

Identity Manager includes e-mail notification templates that are designed specifically for workflow-based provisioning. These e-mail templates include the following.

- ◆ *New Provisioning Request* (Provisioning Notification)
- ◆ *Availability Setting Notification* (Availability)
- ◆ *Delegate Assignment Notification* (Delegate)
- ◆ *Provisioning Approval Notification* (Provisioning Approval Completed Notification)
- ◆ *Reminder - A request is waiting on your approval* (Provisioning Reminder)
- ◆ *Proxy Assignment Notification* (Proxy)

The subject lines are listed first above. The template names (as they appear in iManager and Designer) are given in parentheses.

You can edit the templates to change the content and format of e-mail messages. You can also create new templates. If you create new templates, you need to follow these naming conventions.

- ◆ The language-independent version of the Provisioning Notification template can have any name you like. The default template for notification e-mail messages is called:

Provisioning Notification

- ◆ The language-independent version of the Provisioning Reminder template can have any name you like. The default template for reminder e-mail messages is called:

Provisioning Reminder

- ◆ Each delegation template must have a name that begins with the word:

delegate

The language-independent name can be followed by one or more characters that describe the purpose or content of the template.

- ◆ Each proxy template must have a name that begins with the word:

proxy

The language-independent name can be followed by one or more characters that describe the purpose or content of the template.

- ◆ Each availability template must have a name that begins with the word:

availability

The language-independent name can be followed by one or more characters that describe the purpose or content of the template.

Each language-specific version of a template must have a suffix that provides a language code (for example, `_fr` for French, `_es` for Spanish, and so forth).

To create or edit an e-mail template, use the *Email Templates* task within the Workflow Administration role in iManager.

---

**NOTE:** This task is a shortcut to the *Edit Email Templates* task under the Passwords role.

---

You also can create and edit e-mail templates in Designer.

When you create a User Application driver in iManager or Designer, any e-mail notification templates that are missing from the standard set of e-mail notification templates are replaced. Existing e-mail notification templates are not updated. This is to prevent overwriting e-mail notification templates that you have customized. You can update existing e-mail notification templates manually using Designer (see the section “About E-Mail Notification Templates” in the *Identity Manager 3.5.1 User Application: Design Guide* (<http://www.novell.com/documentation/idm35/index.html>)). For more information about e-mail notification templates, see “Setting up E-Mail Notification Templates” in the *Novell Designer 2.1 for Identity Manager 3.5.1 Administration Guide*.

---

**NOTE:** When you use a localized e-mail template in a provisioning request definition, the preferred locale setting of the recipient of the notification is ignored. For example, the Provisioning Notification of a request using a localized e-mail notification template of Spanish will only send a Spanish e-mail, regardless of the preferred locale setting for the user.

---

## 18.4.1 Default Content and Format

This section shows you what the content of the e-mail templates looks like after you install the product. It also describes the replacement tags that can be used in the e-mail template.

### New Provisioning Request

This template identifies the provisioning request definition that triggered the e-mail message. In addition, it includes a URL that redirects the addressee to the task that requires approval, as well as a URL that displays the complete list of tasks pending for that user.

Hi,

A new provisioning request has been submitted that requires your approval.

Request name: \$requestTitle\$  
Submitted by: \$initiatorFullName\$  
Recipient: \$recipientFullName\$

Please review the details of this request at \$PROTOCOL\$://\$HOST\$: \$PORT\$/\$TASK\_DETAILS\$ to take the appropriate action.

You can review a list of all requests pending your approval at \$PROTOCOL\$://\$HOST\$: \$PORT\$/\$TASKLIST\_CONTEXT\$.

**Table 18-2** *New Provisioning Request Template: Replacement Tags*

Tag	Description
\$userFirstName\$	The first name of the addressee.
\$requestTitle\$	The display name of the provisioning request definition.
\$initiatorFullName\$	The full name of the initiator.
\$recipientFullName\$	The full name of the recipient.
\$PROTOCOL\$	The protocol for URLs included in the e-mail message.
\$SECURE_PROTOCOL\$	The secure protocol for URLs included in the e-mail message.
\$HOST\$	The host for the JBoss application server that is running the Identity Manager User Application. For information about setting the value for this parameter, see <a href="#">Section 18.4.3, “Modifying Default Values for the Template,” on page 349.</a>
\$PORT\$	The port for the Identity Manager User Application. For information about setting the value for this parameter, see <a href="#">Section 18.4.3, “Modifying Default Values for the Template,” on page 349.</a>



Tag	Description
\$SECURE_PORT\$	The secure port for the Identity Manager User Application. For information about setting the value for this parameter, see <a href="#">Section 18.4.3, “Modifying Default Values for the Template,” on page 349.</a>
\$TASKLIST_CONTEXT\$	The page that displays the list of all requests pending for the addressee.
\$TASK_DETAILS\$	The page that displays details for the request for which this e-mail message was generated.

### Availability Setting Notification

This template identifies a user whose availability has been updated. It includes the start time and expiration time of the period for which the user is unavailable, and the resources for which the user is unavailable.

Hi,

\$submitterFirstName\$ \$submitterLastName\$ has updated availability settings for

\$userFirstName\$ \$userLastName\$.

This user has \$operation\$ an availability setting that applies to the following resources:

\$resources\$

This setting indicates that \$userFirstName\$ \$userLastName\$ is unavailable to work on these resources during the timeframe outlined below:

Start time: \$startTime\$

Expiration time: \$expirationTime\$

When a user is unavailable, any delegates assigned may handle resource requests for that user.

You can review a list of your availability settings at \$PROTOCOL\$://\$HOST\$: \$PORT\$/ \$AVAILABILITY\_CONTEXT\$.

**Table 18-3** Availability Setting Notification Template: Replacement Tags

Tag	Description
\$submitterFirstName\$	The first name of the user who updated the availability setting.
\$PROTOCOL\$	The protocol for URLs included in the e-mail message.

Tag	Description
<code>\$PORT\$</code>	The port for the Identity Manager User Application. For information about setting the value for this parameter, see <a href="#">Section 18.4.3, “Modifying Default Values for the Template,”</a> on page 349.
<code>\$startTime\$</code>	The start time of the workflow for this provisioning request.
<code>\$resources\$</code>	The resources (provisioning requests) for which the addressee is unavailable.
<code>\$SECURE_PROTOCOL\$</code>	The secure protocol for URLs included in the e-mail message.
<code>\$expirationTime\$</code>	The time at which the availability will expire.
<code>\$submitterLastName\$</code>	The last name of the user who updated the availability setting.
<code>\$SECURE_PORT\$</code>	The secure port for the Identity Manager User Application. For information about setting the value for this parameter, see <a href="#">Section 18.4.3, “Modifying Default Values for the Template,”</a> on page 349.
<code>\$userFirstName\$</code>	The first name of the user to whom this availability setting applies.
<code>\$userLastName\$</code>	The last name of the user to whom this availability setting applies.
<code>\$HOST\$</code>	The host for the JBoss application server that is running the Identity Manager User Application. For information about setting the value for this parameter, see <a href="#">Section 18.4.3, “Modifying Default Values for the Template,”</a> on page 349.
<code>\$ASSIGNMENT_LIST_CONTEXT\$</code>	The context or path of the URL to the provisioning User Application.

## Delegate Assignment Notification

This template notifies a user when a provisioning request has been submitted that requires the user’s approval. It includes the name of the request, the user who submitted the request, and the full name of the recipient. It includes links for viewing the provisioning request and for viewing all provisioning requests awaiting the user’s approval.

Hi,

A new provisioning request has been submitted that requires your approval.

Request name: `$requestTitle$`

Submitted by: `$initiatorFullName$`

Recipient: `$recipientFullName$`

Please review the details of this request at `$PROTOCOL$://$HOST$: $PORT$/$TASK_DETAILS$` to take the appropriate action.

You can review a list of all requests pending your approval at `$PROTOCOL$://$HOST$: $PORT$/$TASKLIST_CONTEXT$`.

`_SUBJECT`

**Table 18-4** Delegate Assignment Notification: Replacement Tags

Tag	Description
<code>\$submitterFirstName\$</code>	The first name of the user who assigned the delegate.
<code>\$PROTOCOL\$</code>	The protocol for URLs included in the e-mail message.
<code>\$PORT\$</code>	The port for the Identity Manager User Application. For information about setting the value for this parameter, see <a href="#">Section 18.4.3, “Modifying Default Values for the Template,”</a> on page 349.
<code>\$resources\$</code>	The resources (provisioning requests) for which the delegate is available.
<code>\$SECURE_PROTOCOL\$</code>	The secure protocol for URLs included in the e-mail message.
<code>\$fromUsers\$</code>	The users for which the assigned delegate is authorized to handle resource requests.
<code>\$relationship\$</code>	The relationship defined in the directory abstraction layer that was selected for this delegate assignment.
<code>\$expirationTime\$</code>	The time at which the delegate assignment will expire.
<code>\$fromContainers\$</code>	The containers for which the assigned delegate is authorized to handle resource requests.
<code>\$fromGroups\$</code>	The groups for which the assigned delegate is authorized to handle resource requests.
<code>\$submitterLastName\$</code>	The last name of the user who assigned the delegate.
<code>\$SECURE_PORT\$</code>	The secure port for the Identity Manager User Application. For information about setting the value for this parameter, see <a href="#">Section 18.4.3, “Modifying Default Values for the Template,”</a> on page 349.
<code>\$userFirstName\$</code>	The first name of the user who has been assigned as a delegate.
<code>\$userLastName\$</code>	The last name of the user who has been assigned as a delegate.

Tag	Description
\$HOST\$	The host for the JBoss application server that is running the Identity Manager User Application. For information about setting the value for this parameter, see <a href="#">Section 18.4.3, “Modifying Default Values for the Template,”</a> on page 349.
\$ASSIGNMENT_LIST_CONTEXT\$	The context or path of the URL to the provisioning User Application.

## Provisioning Approval Notification

This template notifies a user when an approval process for a provisioning request submitted by the user has been completed.

Hi,

The approval process of your provisioning request has completed.

Request name: \$requestTitle\$  
 Request id: \$requestId\$  
 Submitted by: \$initiatorFullName\$  
 Submitted on: \$requestSubmissionTime\$  
 Recipient: \$recipientFullName\$

Status: \$requestStatus\$

**Table 18-5** Provisioning Approval Notification: Replacement Tags

Tag	Description
\$initiatorFullName\$	The full name of the initiator.
\$requestSubmissionTime\$	The time at which the request was submitted.
\$requestTitle\$	The display name of the provisioning request definition.
\$requestId	The ID of the provisioning request.
\$recipientFullName\$	The full name of the recipient.

## Reminder - A Request Is Waiting on Your Approval

This template reminds a user that a provisioning request that requires the user’s approval is waiting in a queue for approval. It includes the name of the request, the user who submitted the request, and the recipient. It includes links for viewing the provisioning request and for viewing all provisioning requests awaiting the user’s approval.

Hi,

This is a reminder that a provisioning request is sitting in your queue waiting on your approval.

Request name: \$requestTitle\$  
Submitted by: \$initiatorFullName\$  
Recipient: \$recipientFullName\$

Please review the details of this request at \$PROTOCOL\$://  
\$HOST\$: \$PORT\$/\$TASK\_DETAILS\$ to take the appropriate action.

You can review a list of all requests pending your approval at  
\$PROTOCOL\$://\$HOST\$: \$PORT\$/\$TASKLIST\_CONTEXT\$.

**Table 18-6** *Reminder - A request is waiting on your approval: Replacement Tags*

Tag	Description
\$TASKLIST_CONTEXT\$	The page that displays the list of all requests pending for the addressee.
\$PROTOCOL\$	The protocol for URLs included in the e-mail message.
\$PORT\$	The port for the Identity Manager User Application. For information about setting the value for this parameter, see <a href="#">Section 18.4.3, “Modifying Default Values for the Template,”</a> on page 349.
\$SECURE_PROTOCOL\$	The secure protocol for URLs included in the e-mail message.
\$initiatorFullName\$	The full name of the initiator.
\$recipientFullName\$	The full name of the recipient.
\$TASK_DETAILS\$	The page that displays details for the request for which this e-mail message was generated.
\$SECURE_PORT\$	The secure port for the Identity Manager User Application. For information about setting the value for this parameter, see <a href="#">Section 18.4.3, “Modifying Default Values for the Template,”</a> on page 349.
\$userFirstName\$	The first name of the addressee.
\$HOST\$	The host for the JBoss application server that is running the Identity Manager User Application. For information about setting the value for this parameter, see <a href="#">Section 18.4.3, “Modifying Default Values for the Template,”</a> on page 349.
\$requestTitle\$	The display name of the provisioning request definition.

## Proxy Assignment Notification

This template notifies the recipient that a proxy has been assigned. The user who has been assigned as a proxy is identified, as are the users, groups, and containers for which the user is authorized to act as proxy. It includes links for viewing the recipient's list of proxy assignments.

Hi,

A proxy assignment that authorizes a user to act as proxy for one or more users, groups, or containers was \$operation\$ by: \$submitterFirstName\$ \$submitterLastName\$.

Unlike delegate assignments, proxy assignments are independent of resource requests, and therefore apply to all work and settings actions.

The user selected as proxy is:

\$userFirstName\$ \$userLastName\$

The assigned proxy is authorized to handle all work for these users, groups, and containers:

Users: \$fromUsers\$

Groups: \$fromGroups\$

Containers: \$fromContainers\$

This proxy assignment expires at:

\$expirationTime\$

You can review a list of your proxy assignments at \$PROTOCOL\$:// \$HOST\$: \$PORT\$/ \$PROXY\_CONTEXT\$.

**Table 18-7** Proxy Assignment Notification: Replacement Tags

Tag	Description
\$submitterFirstName\$	The first name of the user who assigned the proxy.
\$PROTOCOL\$	The protocol for URLs included in the e-mail message.
\$PORT\$	The port for the Identity Manager User Application. For information about setting the value for this parameter, see <a href="#">Section 18.4.3, "Modifying Default Values for the Template,"</a> on page 349.
\$resources\$	The resources (provisioning requests) for which the proxy is available.

Tag	Description
\$SECURE_PROTOCOL\$	The secure protocol for URLs included in the e-mail message.
\$fromUsers\$	The users for which the assigned proxy is authorized to handle resource requests.
\$expirationTime\$	The time at which the proxy assignment will expire.
\$fromContainers\$	The containers for which the assigned proxy is authorized to handle resource requests.
\$fromGroups\$	The groups for which the assigned proxy is authorized to handle resource requests.
\$submitterLastName\$	The last name of the user who assigned the proxy.
\$SECURE_PORT\$	The secure port for the Identity Manager User Application. For information about setting the value for this parameter, see <a href="#">Section 18.4.3, "Modifying Default Values for the Template,"</a> on page 349.
\$userFirstName\$	The first name of the user who has been assigned as a proxy.
\$userLastName\$	The last name of the user who has been assigned as a proxy.
\$HOST\$	The host for the JBoss application server that is running the Identity Manager User Application. For information about setting the value for this parameter, see <a href="#">Section 18.4.3, "Modifying Default Values for the Template,"</a> on page 349.
\$ASSIGNMENT_LIST_CONTEXT\$	The context or path of the URL to the provisioning User Application.

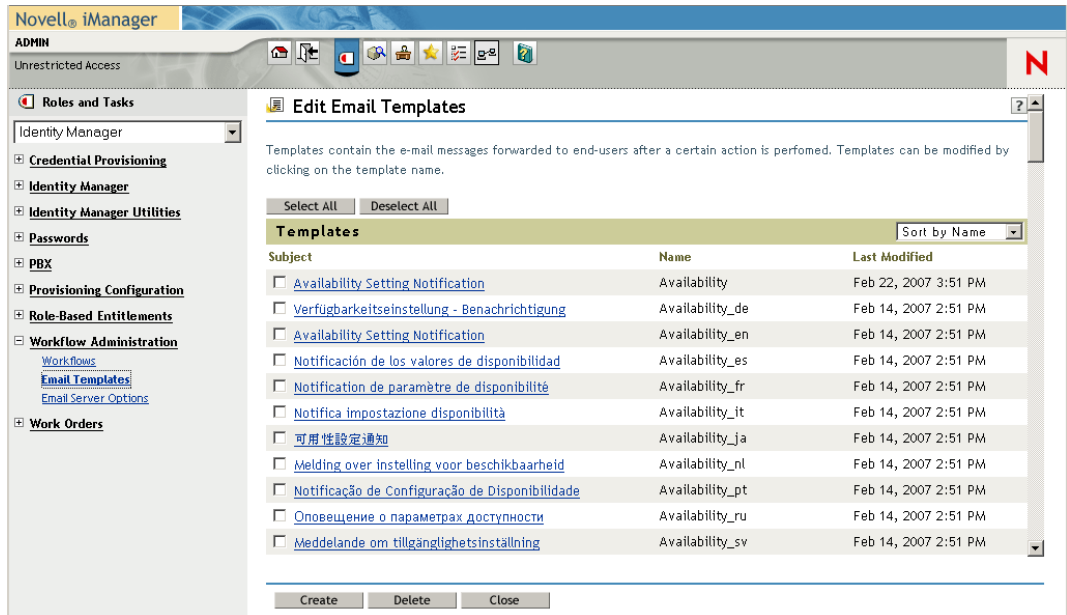
## 18.4.2 Editing E-mail Templates

You can change the content or format of the supplied e-mail templates. For information about creating e-mail templates, see “Configuring E-Mail Notification” in the *Novell Identity Manager Administration Guide*.

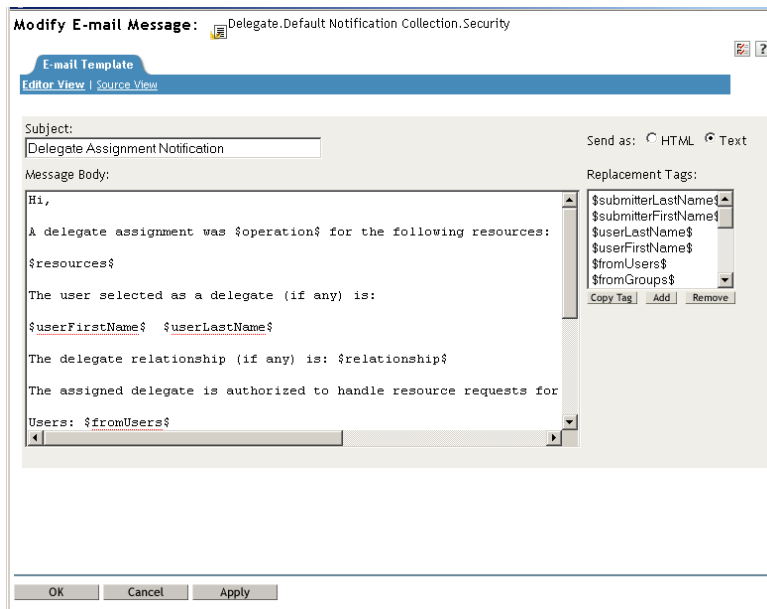
To edit a template:

- 1 Select the *Identity Manager* category in iManager.
- 2 Open the *Workflow Administration* role.
- 3 Click the *Email Templates* task.

iManager displays the *Edit Email Templates* panel.



- 4 Click the name of the e-mail template that you would like to edit.  
iManager displays the *Modify E-mail Message* screen.



- 5 Make your changes in the *Message Body* box.
- 6 If necessary, copy one or more of the supplied tags in the *Replacement Tags* list to include dynamic text in the message body.

For a description of the replacement tags, see [Section 18.4.1, “Default Content and Format,”](#) on page 340.

- 7 When you are finished, click *OK*.



## 18.4.3 Modifying Default Values for the Template

At installation time, you can set default values for several of the replacement tags used in e-mail templates. After you have completed the installation, you can also modify these values by using the User Application Configuration tool.

- 1 Run the `configupdate.sh` script in the `idm` folder.

```
./configupdate.sh
```

On Windows, run `configupdate.bat`.

The screenshot shows the 'User Application Configuration' dialog box. It is divided into four main sections: 'eDirectory Connection Settings', 'eDirectory DNs', 'eDirectory Certificates', and 'Email'. Each section contains various configuration fields, some with search icons. The 'eDirectory Connection Settings' section includes fields for LDAP Host, LDAP Non-Secure Port, LDAP Secure Port, LDAP Administrator, LDAP Administrator Password, Use Public Anonymous Account, LDAP Guest, LDAP Guest Password, Secure Admin Connection, and Secure User Connection. The 'eDirectory DNs' section includes fields for Root Container DN, Provisioning Driver DN, User Application Admin, Provisioning Application Admin, User Container DN, and Group Container DN. The 'eDirectory Certificates' section includes Keystore Path, Keystore Password, and Confirm Keystore Password. The 'Email' section includes Notify Template Host Token. At the bottom of the dialog, there are buttons for 'OK', 'Cancel', and 'Show Advanced Options'.

- 2 Make changes as necessary to any of the following fields:

Field	Description
Email Notify Host	Used to replace the <code>\$HOST\$</code> token in e-mail templates used in approval flows. If left blank, computed by the server.
Email Notify Port	Used to replace the <code>\$PORT\$</code> token in e-mail templates used in approval flows.
Email Notify Secure Port	Used to replace the <code>\$SECURE_PORT\$</code> token in e-mail templates used in approval flows.

- 3 Click *OK* to confirm your changes.

## 18.4.4 Adding Localized E-Mail Templates

To add localized e-mail templates:

- 1 Select the *Identity Manager* category in iManager.
- 2 Open the *Workflow Administration* role.
- 3 Click the *Email Templates* task.  
iManager displays the *Edit Email Templates* panel.
- 4 Identify the e-mail template (without any locale in the name) that you want to copy.
  - 4a Write down the template name to use in [Step 5](#).
  - 4b Click the template subject to open the template and view its message subject, body, and replacement tags.
  - 4c Copy the message subject, body (to be translated), and replacement tags that you want to use in your new template.
  - 4d Click *Cancel*.
- 5 Click *Create*, then enter the template name with a locale extension. For example, to create a *Forgot Hint* template in German, enter the name *Forgot Hint\_de*, where *\_de* signifies *Deutsch* (German).  
If you use a two-letter language and two-letter country code, this works fine. If you attempt to use a locale with a variant such as *en\_US\_TX*, only the variant and language are considered. Do not use locale variants when naming e-mail templates.
- 6 Click *OK*.
- 7 In the template list, click the newly created template, for example *Forgot Hint\_de*, and enter the translated subject and message body. Be sure to preserve the replacement tags surrounded by the dollar (\$) sign in the message body.
- 8 If necessary, copy one or more of the supplied tags in the *Replacement Tags* list to include dynamic text in the message body.  
For a description of the replacement tags, see [Section 18.4.1, “Default Content and Format,” on page 340](#).
- 9 Click *Apply*.
- 10 Click *OK*.

---

**NOTE:** E-mail templates only send localized content if the preferred locale is set for the user (to whom the mail is sent).

---

# Configuring Provisioning Teams

This section describes how to use the iManager plug-ins to manage provisioning teams. Topics include:

- ◆ [Section 19.1, “About the Provisioning Teams Plug-Ins,” on page 351](#)
- ◆ [Section 19.2, “Managing Provisioning Teams,” on page 353](#)
- ◆ [Section 19.3, “Managing Provisioning Team Request Rights,” on page 362](#)
- ◆ [Section 19.4, “Creating a Team to Manage Direct Reports,” on page 370](#)

## 19.1 About the Provisioning Teams Plug-Ins

The *Requests & Approvals* tab in the Identity Manager User Application includes a group of actions called *My Team’s Work*. The *My Team’s Work* actions allow you to work with team member tasks and requests in a workflow.

To configure provisioning teams, you need to use the Provisioning Team and Provisioning Team Requests plug-ins to iManager. The Provisioning Team plug-in lets you define the characteristics of a team. The Provisioning Team Requests plug-in lets you specify the request rights for a team.

---

**NOTE:** A team requests object must be defined for each team definition. Any provisioning team without a team requests object will not be available for use within the User Application.

---

You can find the Provisioning Team and Provisioning Team Requests plug-ins in the Identity Manager category in iManager. These plug-ins are listed under the Provisioning Configuration role.

### 19.1.1 About Teams

A *team* identifies a group of users and determines who can manage provisioning requests and approval tasks associated with this team. The team definition consists of a list of team managers, team members, and team options, as described below:

- ◆ The *team managers* are those users who can administer requests and tasks for the team. Team managers can also be given permission to set proxies and delegates for team members. Team managers can be users or groups.
- ◆ The *team members* are those users who are allowed to participate on the team. Team members can be users, groups, or containers within the directory. Alternatively, they can be derived through directory relationships. For example, the list of members could be derived by the manager-employee relationship within the organization. In this case, the team members would be all users that report to the team manager.

---

**NOTE:** The Provisioning Application Administrator can configure the directory abstraction layer to support cascading relationships, in which case several levels within an organization can be included within a team. The number of levels to include is configurable by the administrator.

---

- ◆ The *team options* determine the provisioning request scope, which specifies whether the team can act on an individual provisioning request, one or more categories of requests, or all

requests. The team options also determine whether team managers can set proxies for team members or set the availability of team members for the purpose of delegation.

---

**NOTE:** The User Application only supports a single level for proxy assignments. Proxy assignments are not propagated to multiple levels.

---

The Provisioning Application Administrator can perform all team management functions.

The team definition itself is managed within iManager by one or more administrative managers.

**Distinction between teams and groups** Although a team can sometimes refer to a group in the Identity Vault, a team is not the same thing as a group. When you define a group in the Identity Vault, you identify a set of users that have something in common. However, the group does not automatically have the capabilities of a team within the User Application. To take advantage of the team capabilities within the User Application, you must define a team that points to the group.

## 19.1.2 About Team Request Rights

The *team requests object* specifies a list of requests that fall within the domain of a team, as well as the rights given to the team managers. The request rights specify the actions that team managers can perform on the provisioning requests and tasks.

The team definition has a *one-to-many relationship* with the team requests object. This means that each team must have at least one team requests object associated with it, but can have more than one team requests object. Each team requests object is associated with only one team definition.

The following task scope options are configurable for team managers:

- ◆ The ability to act on tasks where the team member is an addressee
- ◆ The ability to act on tasks where the team member is a recipient

---

**WARNING:** For security reasons, the recipient task scope option is disabled by default.

Giving a team manager the ability to act on tasks where the recipient of the request is a team member can raise several security issues. First, the manager is then able to view data included on any of the forms that are displayed during the course of workflow execution, regardless of his or her trustee rights. Second, depending on the permission options (see below), a team manager could circumvent the approval process by claiming or approving the task, or by reassigning it to someone else.

---

If both of the task scope options described above are disabled, the team manager cannot view or act on any active requests. Therefore, team managers will typically want to have at least one of these options enabled.

The following permission options are configurable for team managers:

- ◆ The ability to initiate a provisioning request on behalf of a team member.
- ◆ The ability to retract a provisioning request on behalf of a team member.
- ◆ The ability to make a team member a delegate for other team members' provisioning requests.
- ◆ The ability to claim a task for a team member who is a recipient or addressee (based on the task scope).
- ◆ The ability to reassign a task for a team member who is a recipient or addressee (based on the task scope).

---

**NOTE:** The User Application only supports a single level for delegate assignments. Delegate assignments are not propagated to multiple levels.

---

The trustee rights defined for a provisioning request apply to team managers who want to initiate a request on behalf of their team members.

### 19.1.3 Using a Team to Manage Direct Reports

You can define a team that allows managers throughout an organization to control the provisioning environment for their direct reports. If defined properly, a single team definition can be used to allow *all* managers to control the activities of their direct reports, thereby removing the need to define a separate team for each reporting relationship.

Here are the basic requirements for a team that supports direct reports within an organization:

- ◆ The members of the team are defined by the Manager-Employee relationship.
- ◆ The managers of the team are defined by a dynamic group that searches subcontainers, using a search filter that retrieves only the managers.

After the team has been defined, the User Application allows all managers to use the team management actions within the navigation menu. This gives the managers the ability to control the provisioning activities that their direct reports can perform.

For details on how to define a team to manage direct reports, see [Section 19.4, “Creating a Team to Manage Direct Reports,” on page 370](#).

---

**NOTE:** This technique replaces the notion of an organizational team supported in earlier releases of the Identity Manager User Application.

---

## 19.2 Managing Provisioning Teams

Before configuring a provisioning team, you need to select the Identity Manager User Application driver that contains the definition. After selecting the driver, you can create a new team definition, edit an existing definition, or delete an existing definition.

The *Provisioning Teams* and *Provisioning Team Requests* tasks use the same driver as the *Provisioning Requests* task.

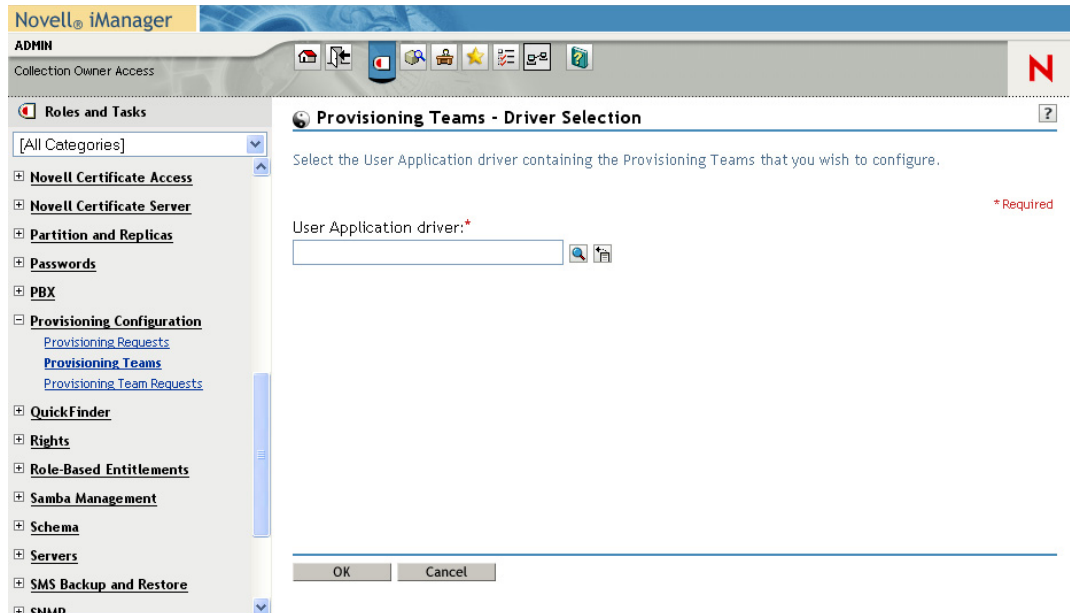
### 19.2.1 Selecting the Driver

After you have selected a User Application driver for the *Provisioning Requests*, *Provisioning Teams*, or *Provisioning Team Requests* task, you don't have to select the User Application driver again during this iManager session.

To select a User Application driver:

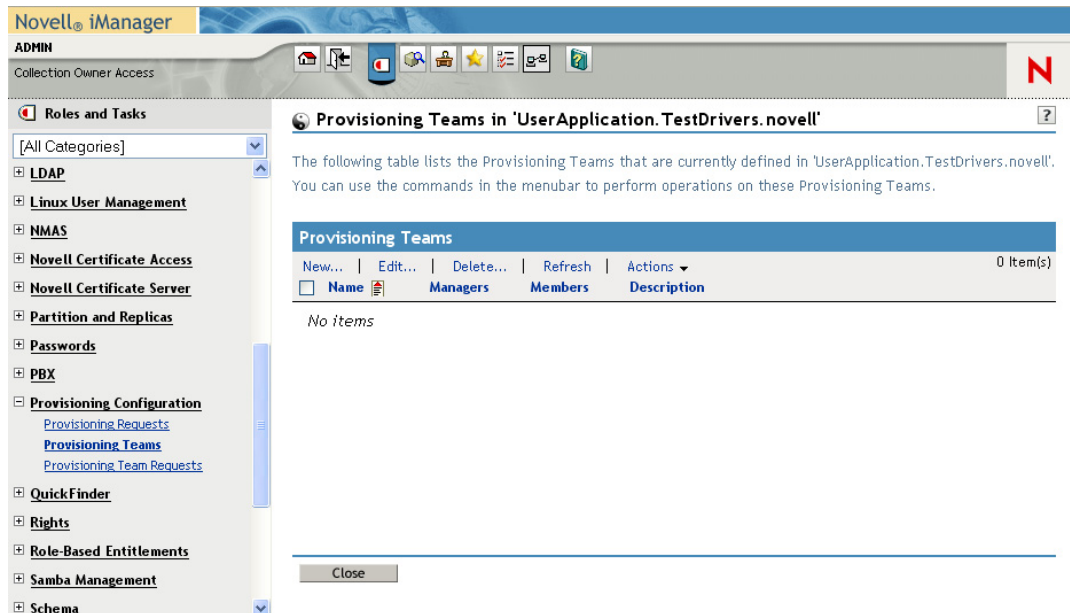
- 1 Select the *Identity Manager* category in iManager.
- 2 Open the *Provisioning Configuration* role.
- 3 Click the *Provisioning Teams* task.

iManager displays the User Application Driver panel.



- 4 Specify the driver name in the *User Application Driver* field, then click *OK*.

iManager displays the Provisioning Teams panel. The Provisioning Teams panel displays a list of existing team definitions.



**Changing the driver.** When you have selected a driver, the driver selection remains in effect for the duration of your iManager session, unless you select a new driver. To select a new driver, click the *Actions* command and choose *Select User Application Driver* from the *Actions* menu.

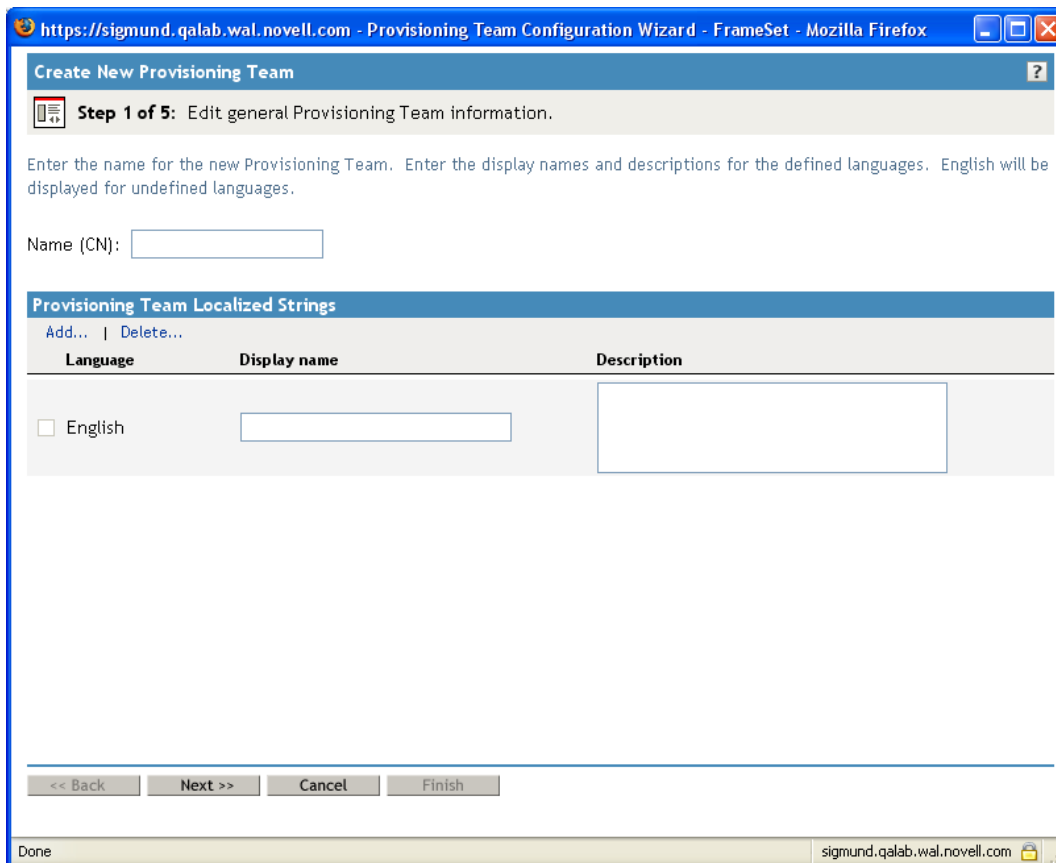
## 19.2.2 Creating or Editing a Provisioning Team

To create a new provisioning team:

- 1 Click the *New* command in the Provisioning Teams panel.

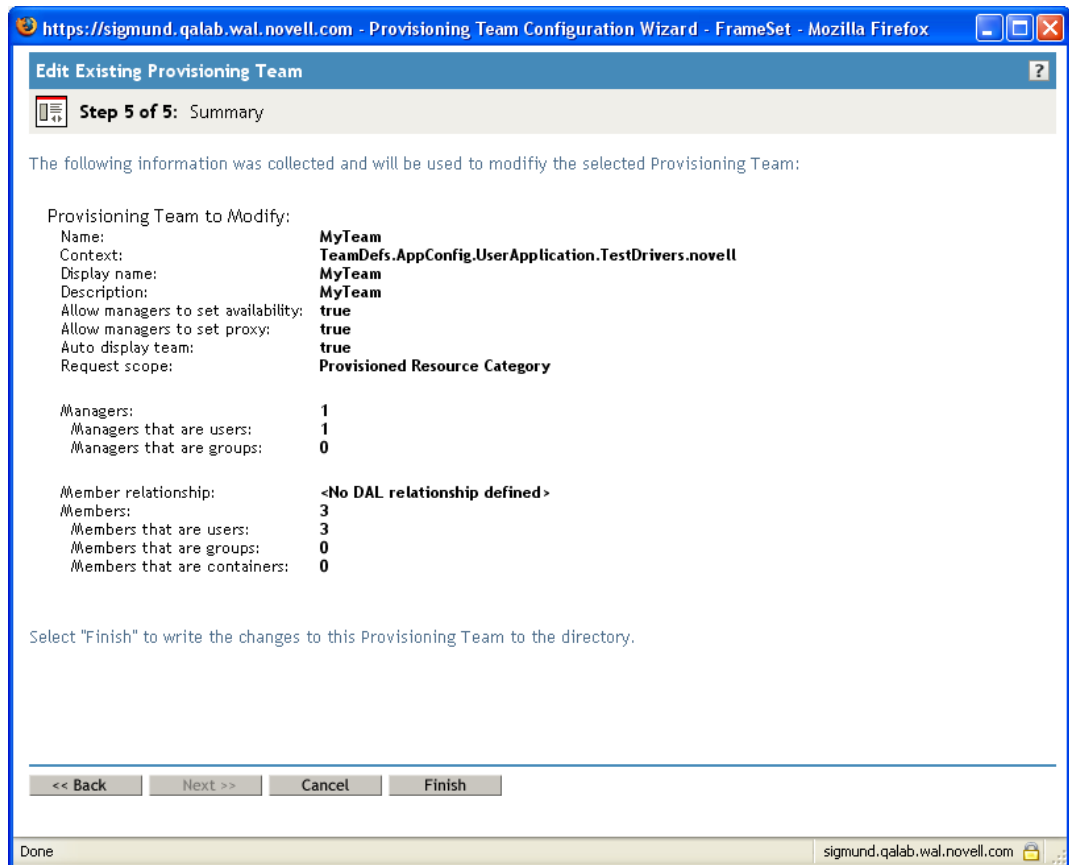


The first page of the Create New Provisioning Team wizard displays.



- 2 Type a common name for the new object in the *Name (CN)* field.
- 3 For each language you want to support in your application, type the localized text in the *Display Name* and *Description* fields under *Provisioning Team Localized Strings*. This text is used to identify the provisioning team throughout the User Application.
- 4 To add a new language to the list, click *Add*, then select the desired language.  
By default, a newly created provisioning team supports only English.

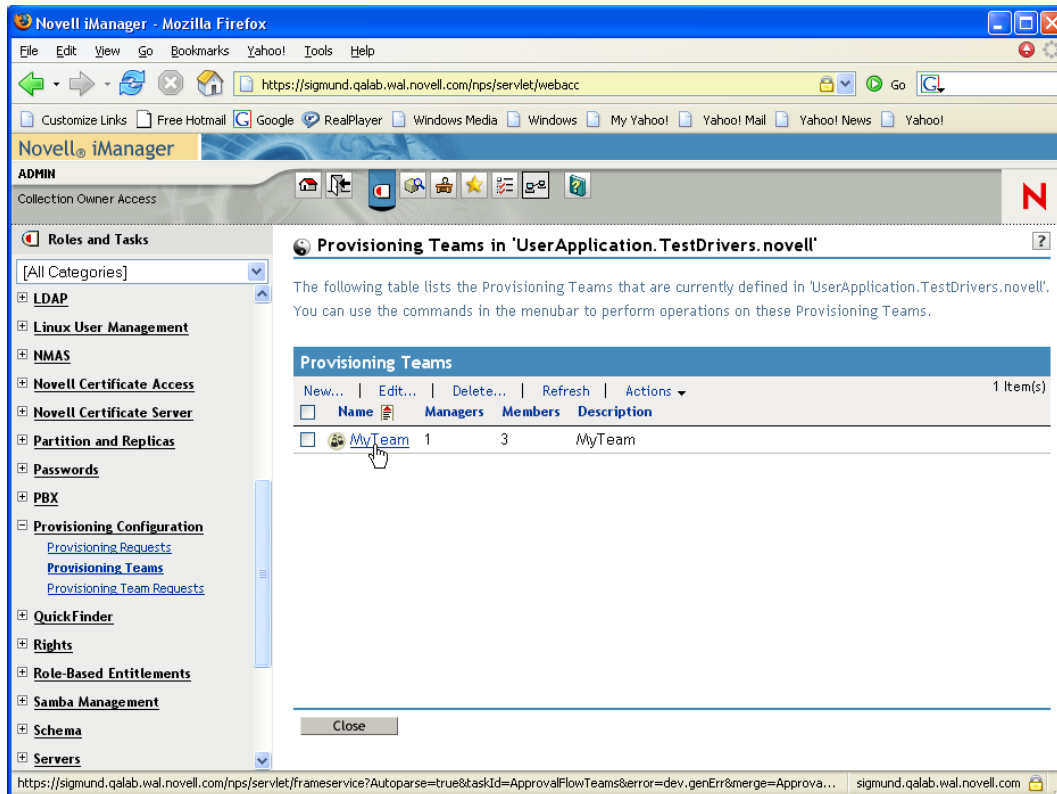
- 5 Click *Next*.
- 6 Specify the managers for the team, as described in “[Specifying the Team Managers](#)” on [page 358](#).
- 7 Specify the members of the team, as described in “[Specifying the Team Members](#)” on [page 359](#).
- 8 Specify the team options for the team, as described in “[Specifying the Team Options](#)” on [page 360](#).
- 9 Review your settings, then click *Finish*.



To edit an existing provisioning team:



- 1 Click the name of the provisioning team in the Provisioning Teams panel.



If you have a large number of team definitions, you might want to sort the list by a particular column, such as the *Name* or *Description*. To sort by a particular column, click the column heading.

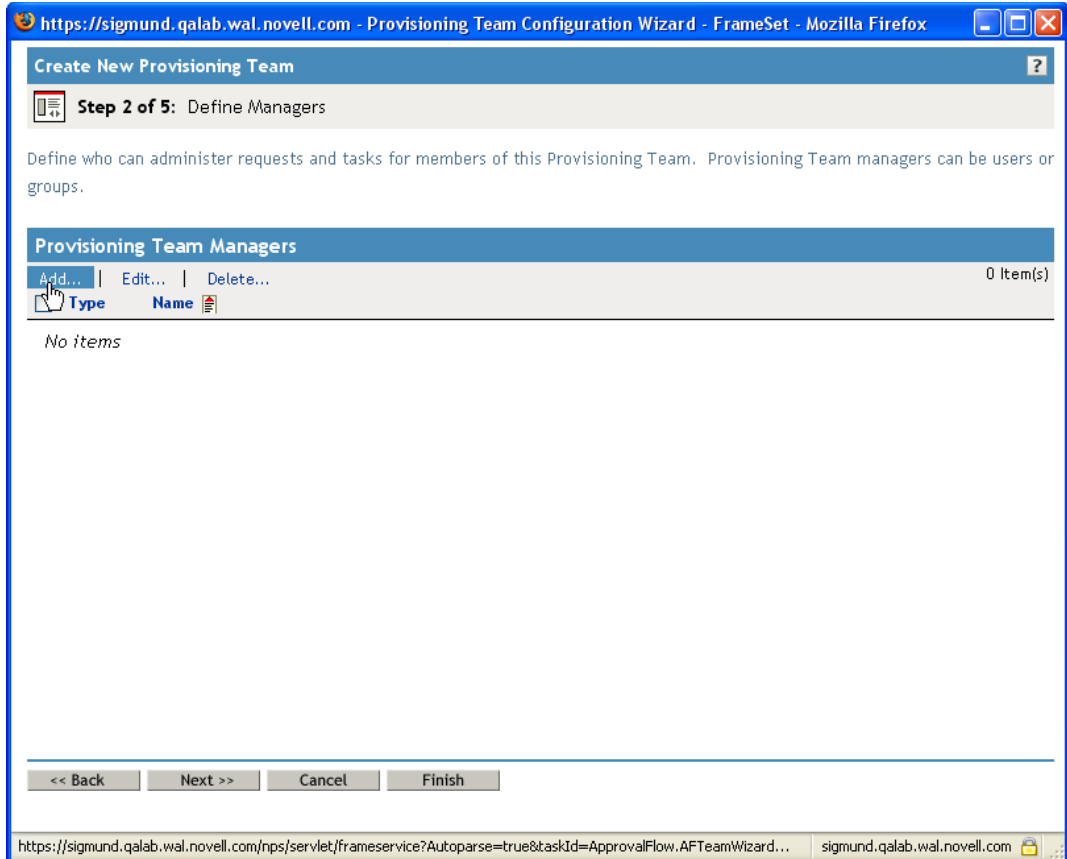
- 2 For each language you want to support in your application, click the check box beside the language in the list under *Provisioning Team Localized Strings*, and type the localized text in the *Display Name* and *Description* fields. This text is used to identify the provisioning team throughout the User Application.
- 3 To add a new language to the list, click *Add* and select the desired language.  
By default, a newly created provisioning team supports only English.
- 4 Click *Next*.
- 5 Specify the managers for the team, as described in “[Specifying the Team Managers](#)” on [page 358](#).
- 6 Specify the members of the team, as described in “[Specifying the Team Members](#)” on [page 359](#).
- 7 Specify the team options for the team, as described in “[Specifying the Team Options](#)” on [page 360](#).
- 8 Review your settings, then click *Finish*.  
iManager displays a message to remind you that you must define a team requests object for this team in order to make the team available for use within the User Application.
- 9 Click *OK*.

## Specifying the Team Managers

This section provides instructions for specifying the managers for a team.

To specify the team managers:

- 1 Click *Add*.



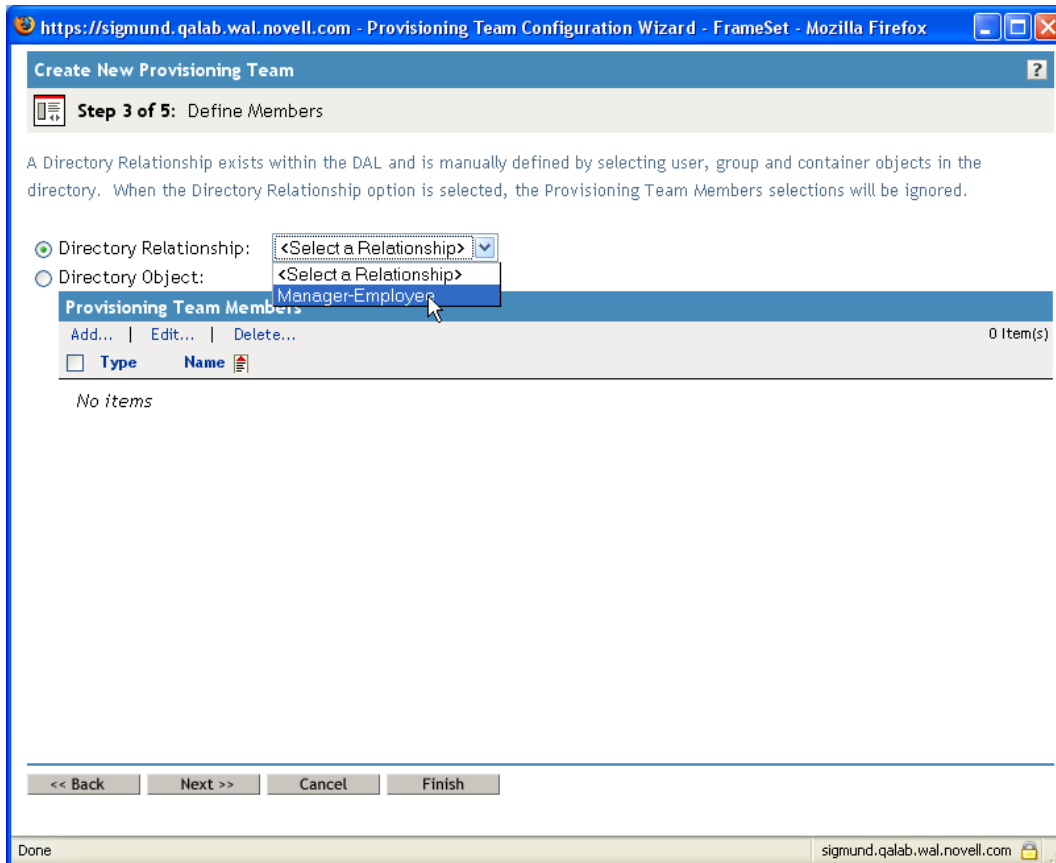
The interface displays the Object Selector.

- 2 Select one or more users or groups, then click *OK*.
- 3 Click *Next*.

## Specifying the Team Members

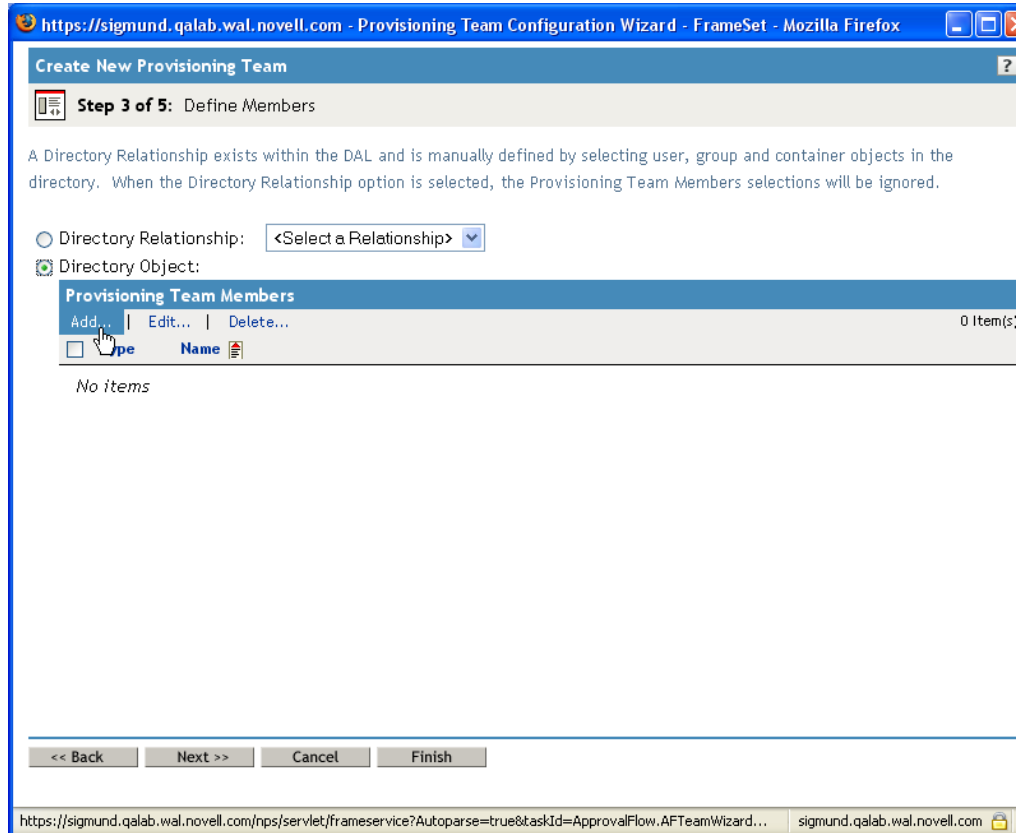
To specify the team members:

- 1 To define the members by using a directory relationship, click *Directory Relationship*, then select the relationship in the drop-down list.



- 2 To define the members by selecting them individually, click *Directory Object*, then follow these instructions:

**2a** Click *Add*.



The interface displays the Object Selector.

**2b** Select one or more users, groups, or containers, then click *OK*.

**3** Click *Next*.

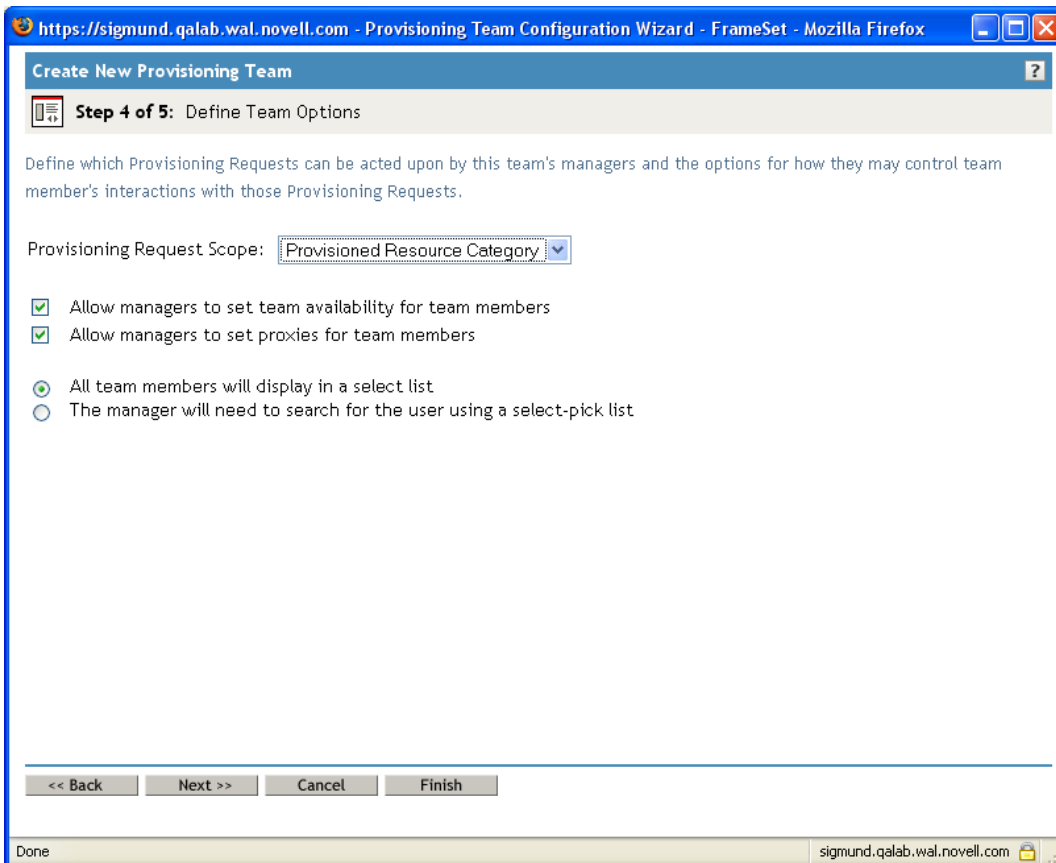
## Specifying the Team Options

To specify the team options:

- 1 Define which request types the team manager can act on by selecting one of these options in the *Provisioning Request Scope* drop-down list:
  - ◆ *Individual Provisioning Request* indicates that this team definition applies to a single request type. You specify the request type when you define the team requests object.
  - ◆ *Provisioned Request Category* indicates that this team definition applies to all request types associated with a particular category. You specify the category when you define the team requests object.
  - ◆ *All Provisioning Requests* indicates that this team definition applies to all request types.
- 2 Define the team settings, as follows:

Setting	Description
<i>Allow managers to set team availability for team members</i>	When this setting is enabled, the team managers can access the <i>Team Availability</i> action in the navigation menu of the User Application.
<i>Allow managers to set proxies for team members</i>	When this setting is enabled, the team managers can access the <i>Team Proxy Assignments</i> action in the navigation menu of the User Application.
<i>All team members will display in a select list</i>	When this option is selected, the manager can select team members in a drop-down list box. Use this option when the team has only a few members.
<i>The manager will need to search for the user using a select-pick list</i>	When this option is selected, the manager must use the Object Selector to select team members. Use this option when the team has a large number of members.

If a particular team definition does not permit team managers to set proxies or team availability settings, the manager can still view the settings defined for the team members by the administrator or by a manager of another team to which these users belong. However, the team manager cannot edit these settings, view details for these settings, or create new proxy assignments or team availability settings.



- 3 If there are any existing team requests objects that refer to this team definition, you can navigate directly to one of these objects by clicking on the object name in the list, under the heading *Provisioning Team Requests Referring to this Provisioning Team*.

#### Provisioning Team Requests Referring to this Provisioning Team

[MyTeamRequests.TeamDefs.AppConfig.UserApplication.TestDrivers.novell](#)

When you click on a team requests object, iManager asks you commit your *Provisioning Request Scope* setting. If you click *OK* to commit this setting, the user interface takes you directly to the Provisioning Team Requests plug-in to allow you to make changes to the team requests object.

### 19.2.3 Deleting a Provisioning Team

To delete a provisioning team:

- 1 Select the provisioning team you want to delete by clicking the check box next to the name.
- 2 Click the *Delete* command in the Provisioning Teams panel.

## 19.3 Managing Provisioning Team Request Rights

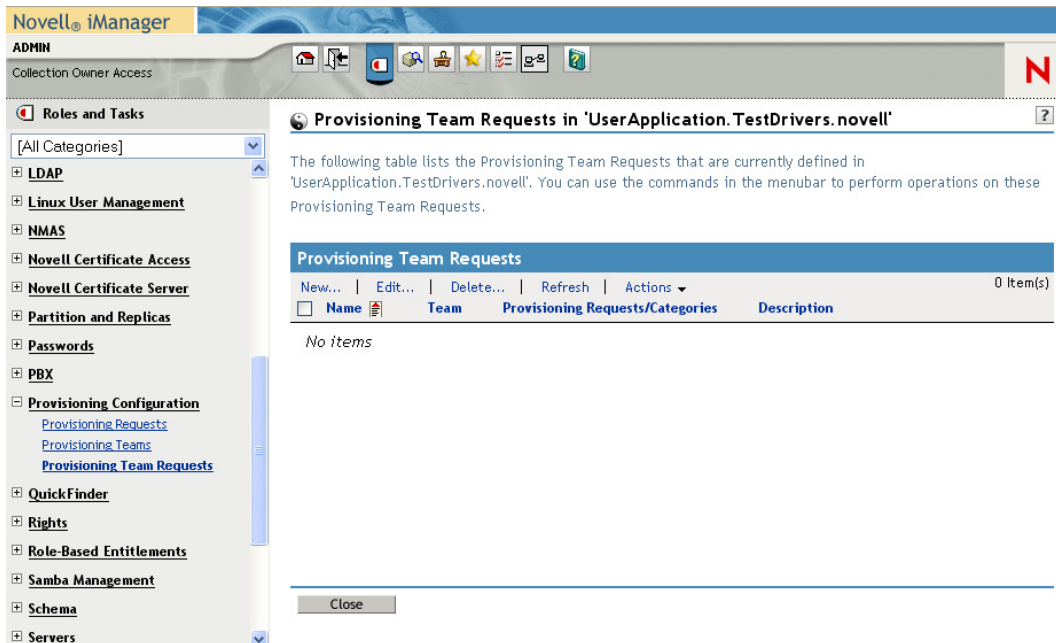
Before configuring a provisioning team requests object, you need to select the Identity Manager User Application driver that contains the definition. After selecting the driver, you can create a new team requests definition, edit an existing definition, or delete an existing definition.

### 19.3.1 Selecting the Driver

To select an Identity Manager User Application driver:

- 1 Select the *Identity Manager* category in iManager.
- 2 Open the *Provisioning Configuration* role.
- 3 Click the *Provisioning Team Requests* task.  
iManager displays the User Application Driver panel.
- 4 Specify the driver name in the *User Application Driver* field, then click *OK*.

iManager displays the Provisioning Team Requests panel. The Provisioning Team Requests panel displays a list of existing team requests objects.

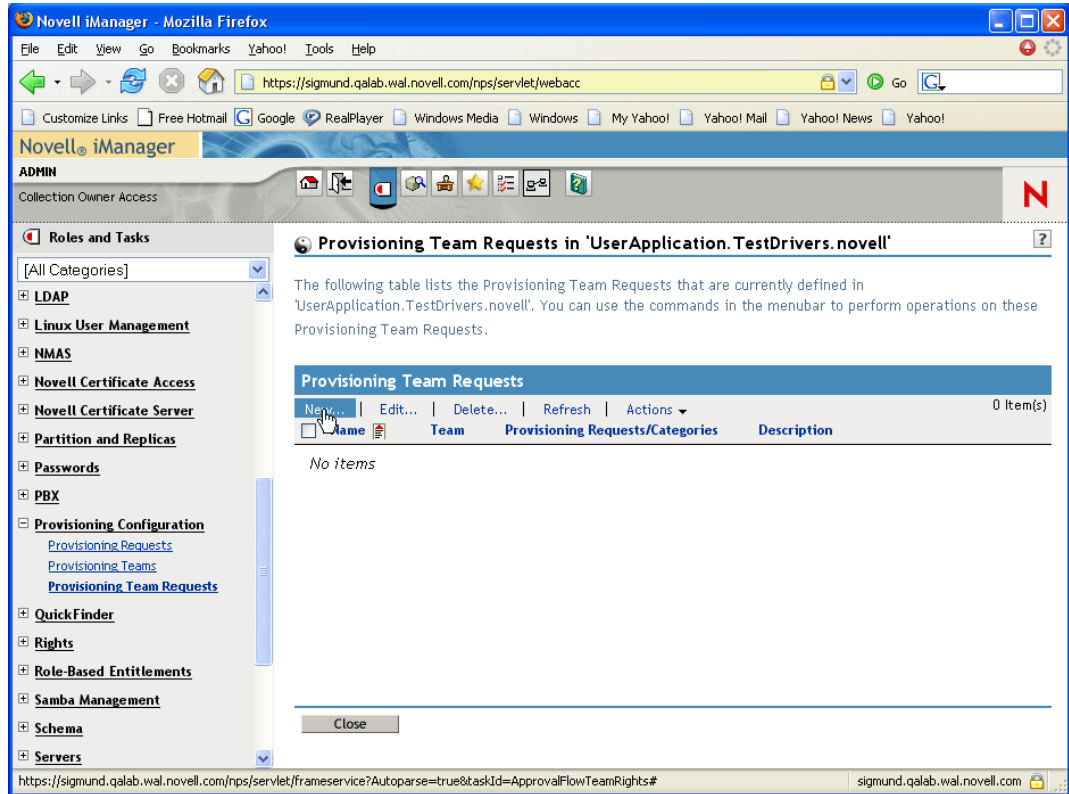


**Changing the driver.** When you have selected a driver, the driver selection remains in effect for the duration of your iManager session, unless you select a new driver. To select a new driver, click the *Actions* command, then choose *Select User Application Driver* from the *Actions* menu.

## 19.3.2 Creating or Editing a Provisioning Team Requests Object

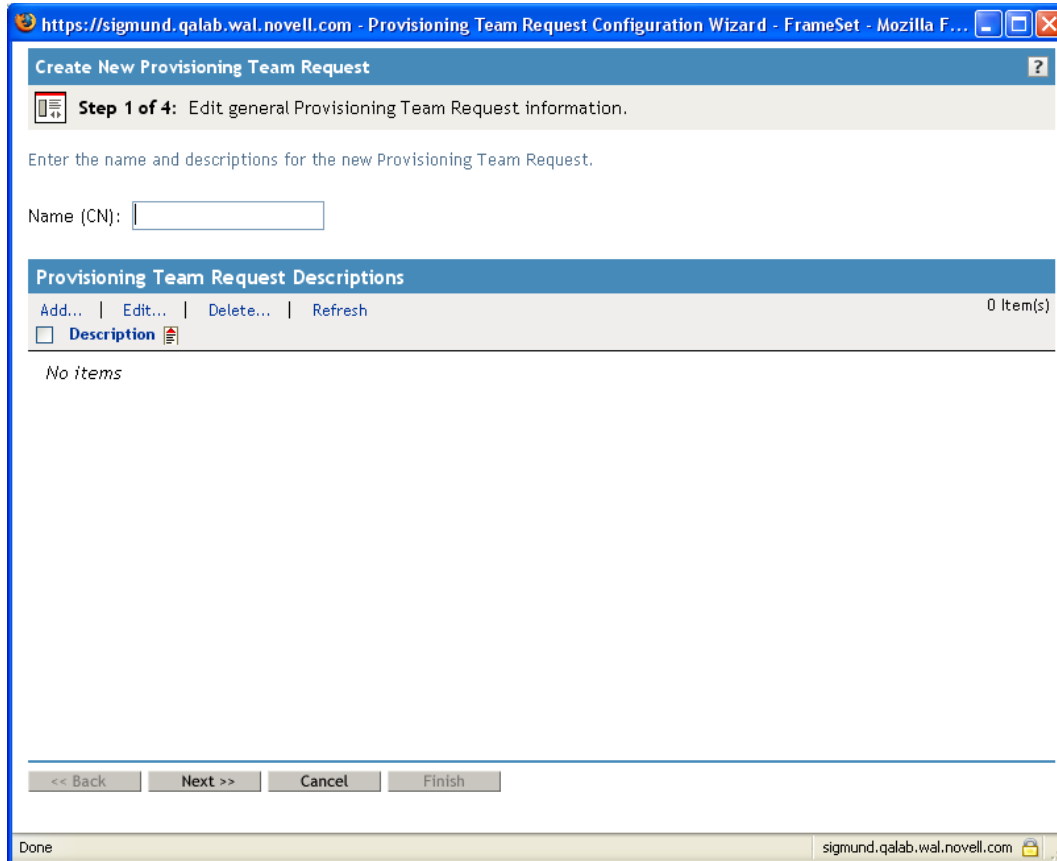
To create a new provisioning team requests object:

- 1 Click the *New* command in the Provisioning Team Requests panel.



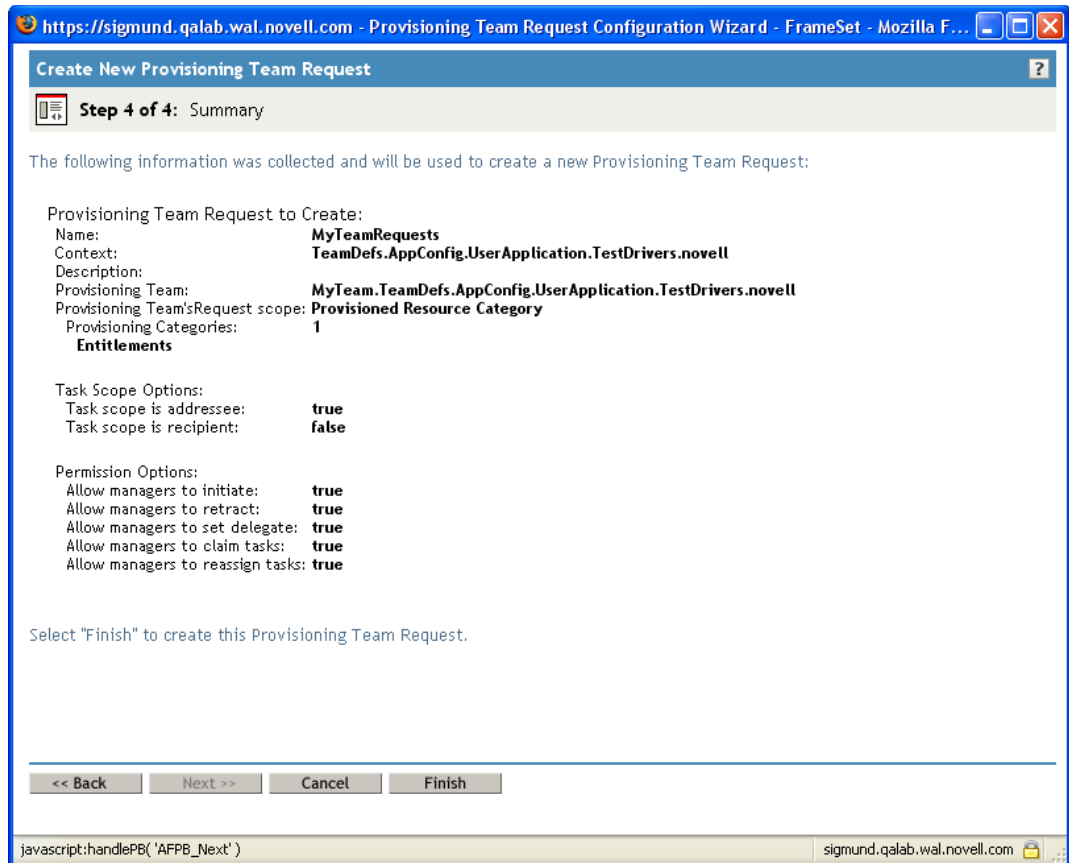


The first page of the Create New Provisioning Team Request wizard displays.



- 2 Type a common name for the new object in the *Name (CN)* field.
- 3 For each description you want to add for the team requests object, type the description text in the *Description* fields under *Provisioning Team Request Descriptions*. This text is used to identify the provisioning team requests object in iManager.
- 4 To add a new description for the team requests object, click *Add*, type the description text, then click *OK*.  
The text is then added to the *Description* field under *Provisioning Team Request Descriptions*. This text is used to describe the team requests object on the Provisioning Team Requests panel.
- 5 Click *Next*.
- 6 Select the team definition to which this team requests object applies, as described in “[Selecting the Team Definition for the Team Requests Object](#)” on page 366.
- 7 Specify the task scope and permission options for the team requests object, as described in “[Specifying the Team Requests Options](#)” on page 367.

8 Review your settings, then click *Finish*.

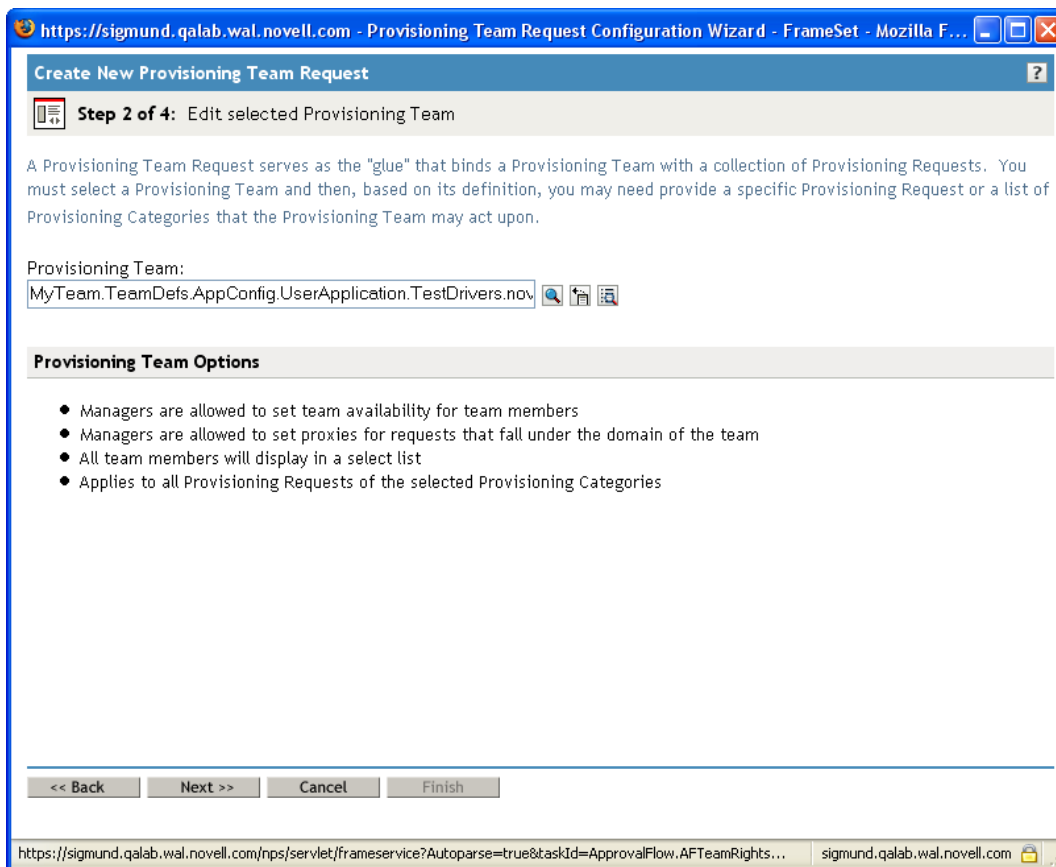


## Selecting the Team Definition for the Team Requests Object

To select the team definition:

- 1 Use the Object Selector to pick a team.

After you have made your selection, the team is displayed in the *Provisioning Team* field, and the team options settings for the team are displayed under *Provisioning Team Options*.



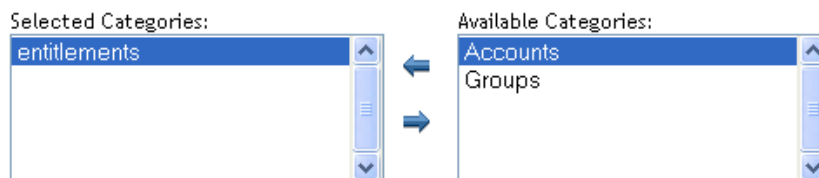
2 Click *Next*.

## Specifying the Team Requests Options

To specify the team requests options:

1 Define the scope for the team requests object:

- ♦ If the scope for the team is *Provisioned Resource Categories*, select one or more categories for this team requests object by moving them from the *Available Categories* list into the *Selected Categories* list.



- ◆ If the scope for the team is *Individual Provisioning Request*, use the Object Selector to choose the provisioning request for this team requests object.

Provisioning Request:



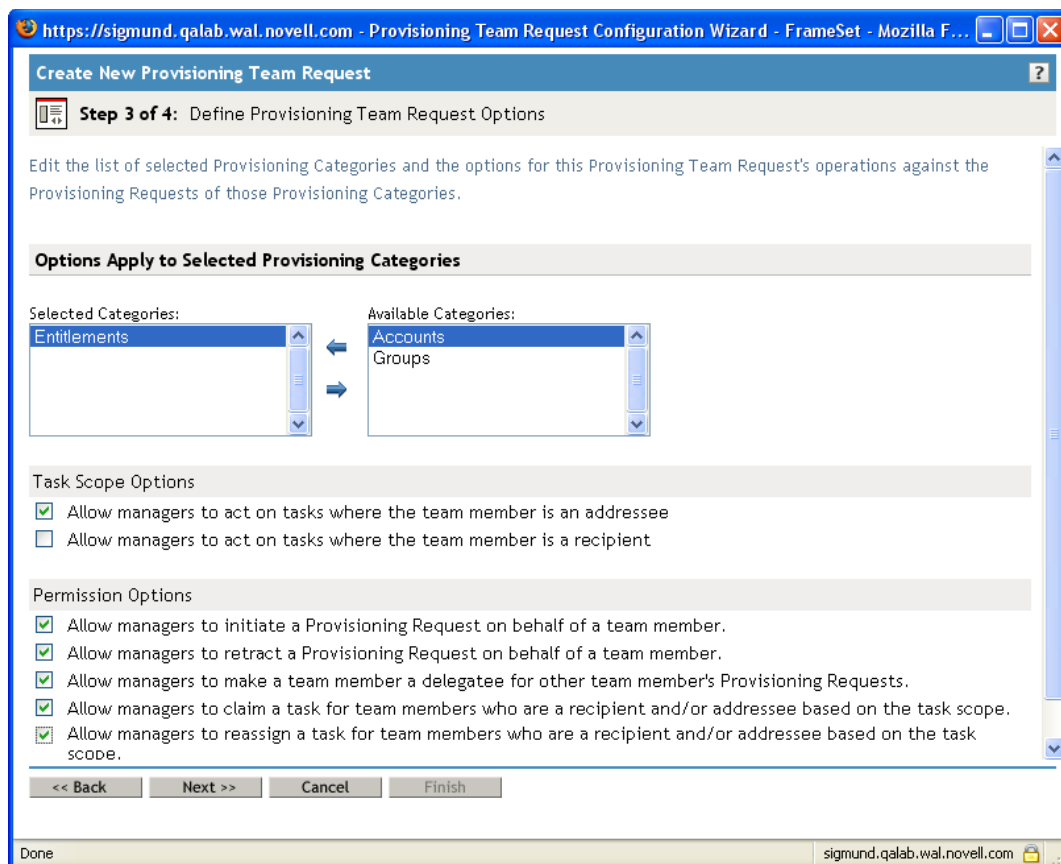

- ◆ If the scope for the team is All Provisioning Requests, you do not need to take any additional action in the team requests object.

**2** Define the task scope options, as follows:

Setting	Description
<i>Allow managers to act on tasks where the team member is an addressee</i>	<p>When this setting is enabled, the team managers can use the <i>Team Tasks</i> action within the User Application to take actions on tasks for which the team members are addressees. These actions include approving and denying requests.</p> <p>If you do not permit team managers to act on tasks for which the team member is an addressee, you can view these tasks, but you cannot see details about them, or take actions on them.</p>
<i>Allow managers to act on tasks where the team member is a recipient</i>	<p>When this setting is enabled, the team managers can use the <i>Team Tasks</i> action within the User Application to take actions on tasks for which the team members are recipients. These actions include approving and denying requests.</p> <p>If you do not permit team managers to act on tasks for which the team member is a recipient, you can view these tasks, but you cannot see details about them, or take actions on them.</p> <hr/> <p><b>NOTE:</b> For security reasons, the recipient task scope option is disabled by default. Giving a team manager the ability to act on tasks where the recipient of the request is a team member can raise several security issues. First, the manager is then able to view data included on any of the forms that are displayed during the course of workflow execution, regardless of his or her trustee rights. Second, depending on the permission options (see below), a team manager could circumvent the approval process by claiming or approving the task or reassigning it to someone else.</p>

**3** Define the permission options, as follows:

Setting	Description
<i>Allow managers to initiate a Provisioning Request on behalf of a team member</i>	When this setting is enabled, the list of resources on the <i>Request Team Resources</i> page of the User Application includes resources that are within the scope of this team. When this setting is disabled, these resources are not included.
<i>Allow managers to retract a Provisioning Request on behalf of a team member</i>	When this setting is enabled, the Retract button is displayed on the <i>Team Requests</i> page for requests that are within the scope of this team. When this setting is disabled, the Retract button is not displayed.
<i>Allow managers to make a team member a delegatee for other team member's Provisioning Requests</i>	<p>When this option is enabled, the manager can use the <i>Team Delegate Assignments</i> action to designate a team member as a delegate for another team member's provisioning requests.</p> <p>If this option is disabled, the manager can still view delegate settings defined for the team members by the administrator or by a manager of another team to which these users belong. However, the team manager cannot edit or delete these settings, view details for these settings, or create new delegate assignments.</p>
<i>Allow managers to claim a task for team members who are a recipient and/or addressee based on the task scope</i>	When this setting is enabled, the Claim button is enabled on the <i>Team Tasks</i> page for requests that are within the scope of this team. When this setting is disabled, the Claim button is greyed out.
<i>Allow managers to reassign a task for team members who are a recipient and/or addressee based on the task scope</i>	When this setting is enabled, the Reassign button is enabled on the <i>Team Tasks</i> page for requests that are within the scope of this team. When this setting is disabled, the Reassign button is greyed out.



#### 4 Click *Next*.

---

**NOTE:** The Provisioning Team Requests plug-in allows you to configure two different team requests objects that use the same provisioning request or category with different sets of permissions for the same team. This might lead to conflicts that make the permissions associated with a team unclear. To avoid these sorts of conflicts, make sure you do not define two different team requests objects that specify different sets of permissions for the same provisioning request or category.

---

### 19.3.3 Deleting a Provisioning Team Requests Object

To delete a provisioning team requests object:

- 1 Select the provisioning team requests object you want to delete by clicking the check box next to the name.
- 2 Click the *Delete* command in the Provisioning Team Requests panel.

## 19.4 Creating a Team to Manage Direct Reports

To define a team that manages direct reports:

- 1 In iManager, create a dynamic group called Managers.

**1a** Set the *Search Scope* to *Search Sub Containers*.

Search Scope:

**1b** Specify the *Search Filter* as `(&(isManager=TRUE))`.

Search Filter:

For complete details on creating dynamic groups, see the *Novell Identity Manager: Administration Guide*.

**2** In iManager, define a provisioning team by selecting *Provisioning Teams* under *Provisioning Configuration*.

**2a** Name the team DirectReports.

https://sigmund.qalab.wal.novell.com - Provisioning Team Configuration Wizard - FrameSet - Mozilla Firefox

Edit Existing Provisioning Team

Step 1 of 5: Edit general Provisioning Team information.

Enter or edit the display names and descriptions for the defined languages. English will be displayed for undefined languages.

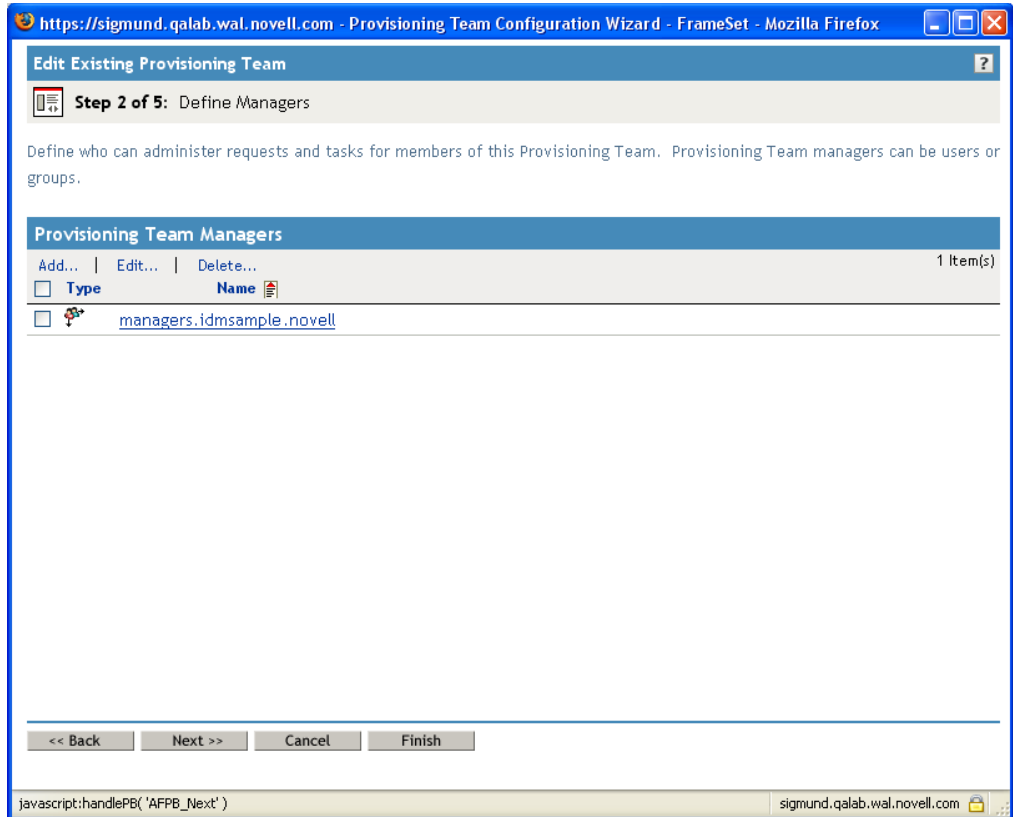
Name (CN): DirectReports

Provisioning Team Localized Strings		
Language	Display name	Description
<input type="checkbox"/> English	DirectReports	Team that defines seafang administration manager ( based on direct reports)

<< Back   Next >>   Cancel   Finish

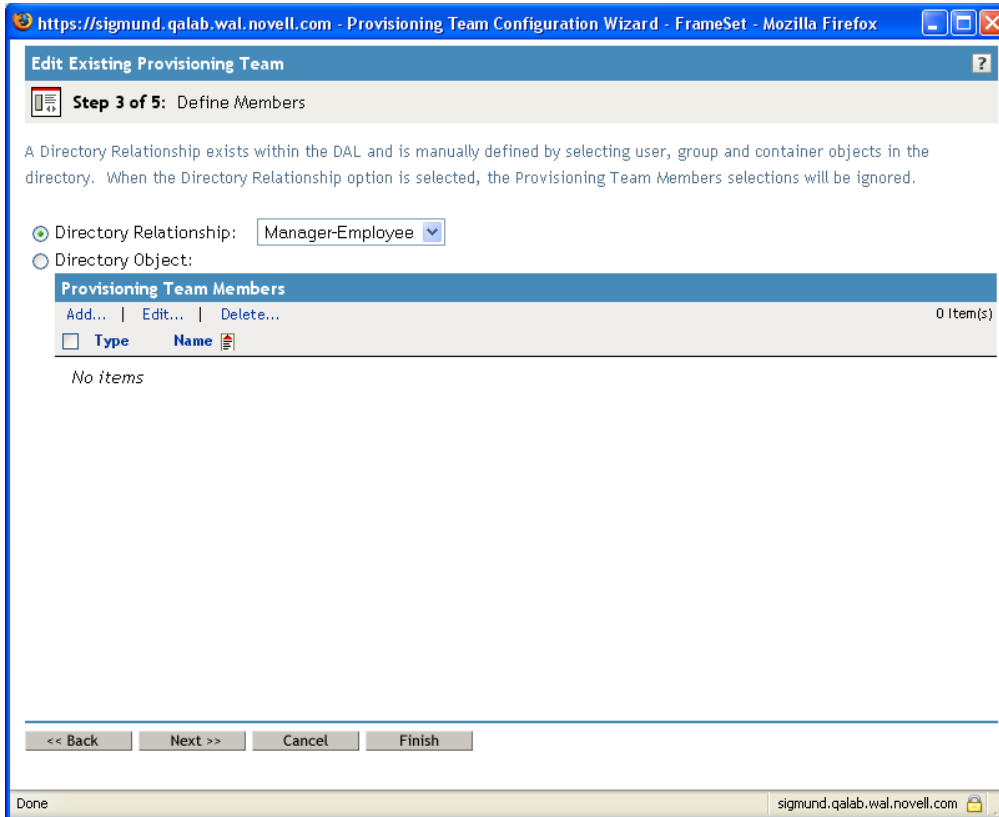
Done   sigmund.qalab.wal.novell.com

**2b** To identify the team managers, pick the Managers dynamic group you created earlier.



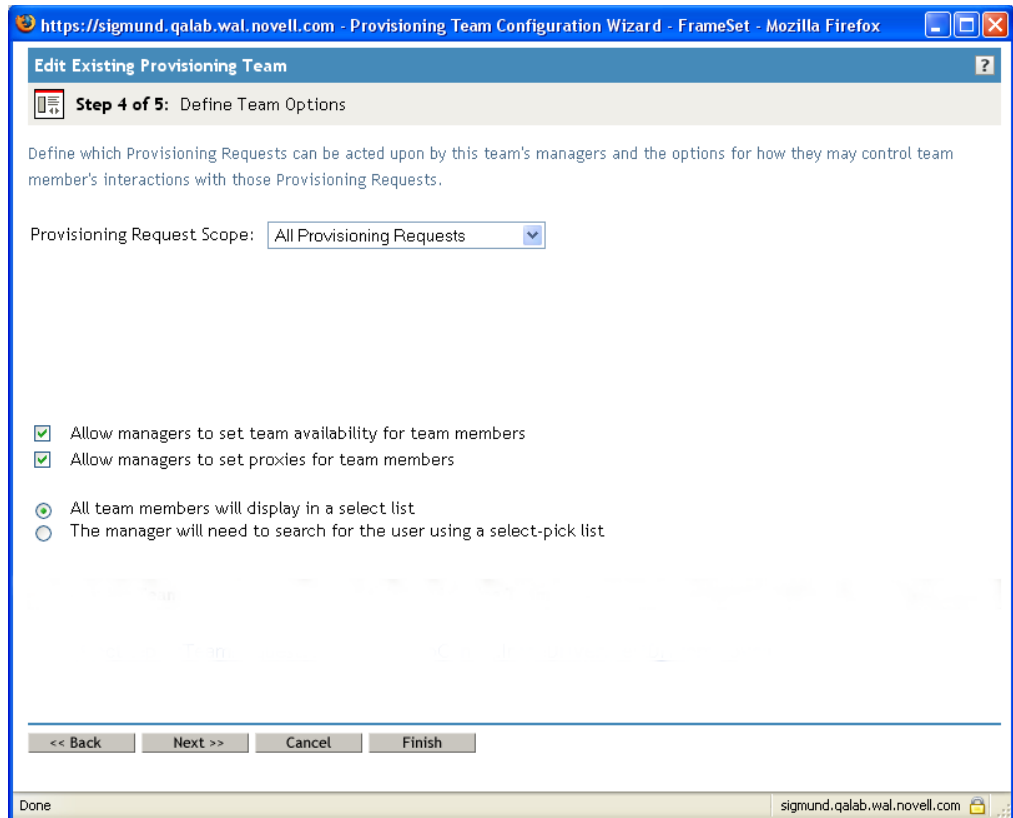


**2c** To identify the team members, select the *Manager-Employee* relationship.



**2d** To define the team options:

- ◆ Set the *Provisioning Request Scope* to *All Provisioning Requests*.
- ◆ Select *Allow managers to set team availability for team members*.
- ◆ Select *Allow managers to set proxies for team members*.
- ◆ Select *All team members will display in a select list*.



**2e** Review the summary page, then click *Finish*.

**3** In iManager, define a provisioning team requests object by selecting *Provisioning Team Requests* under *Provisioning Configuration*.

**3a** Name the team *DirectReportsTeamRequestRights*.

**3b** To identify the associated team, select the *DirectReports* provisioning team you created earlier. When you select this team, the iManager interface shows you the settings for the team.

**3c** To specify the task scope options:

- ◆ Select *Allow managers to act on tasks where the team member is an addressee*.
- ◆ Deselect *Allow managers to act on tasks where the team member is a recipient*.

**3d** To define the permission options:

- ◆ Select *Allow managers to initiate a Provisioning Request on behalf of a team member*.
- ◆ Select *Allow managers to retract a Provisioning Request on behalf of a team member*.
- ◆ Select *Allow managers to make a team member a delegatee for other team member's Provisioning Requests*.
- ◆ Select *Allow managers to claim a task for team members who are a recipient and/or addressee based on the task scope*.
- ◆ Select *Allow managers to reassign a task for team members who are a recipient and/or addressee based on the task scope*.

**3e** Review the summary page, then click *Finish*.



# Web Service Reference

# VI

These sections describe the Web Service endpoints provided for the User Application.

- ♦ [Chapter 20, “Provisioning Web Service,” on page 379](#)
- ♦ [Chapter 21, “Metrics Web Service,” on page 449](#)
- ♦ [Chapter 22, “Notification Web Service,” on page 467](#)
- ♦ [Chapter 23, “Directory Abstraction Layer \(VDX\) Web Service,” on page 477](#)



This section describes the Provisioning Web Service, which allows SOAP clients to access Provisioning functionality. Topics include:

- ♦ [Section 20.1, “About the Provisioning Web Service,” on page 379](#)
- ♦ [Section 20.2, “Developing Clients for the Provisioning Web Service,” on page 380](#)
- ♦ [Section 20.3, “Provisioning Web Service API,” on page 390](#)

## 20.1 About the Provisioning Web Service

The Identity Manager provisioning module includes a workflow system that executes approval flows. A workflow process is based on a provisioning request definition, which is an XML document stored in the Identity Vault. The provisioning request definition describes an arbitrary topology using activities and links. For example, a provisioning request to grant an entitlement might have a workflow that collects approvals from relevant users and writes the entitlement to the directory.

To support access by third-party software applications, the provisioning workflow system includes a Web service endpoint. The endpoint offers all provisioning functionality (for example, allowing SOAP clients to start a new approval flow, or list currently executing flows). The Web service is built using the Novell Web Service SDK (WSSDK), which supports the WS-I Basic Profile, thus guaranteeing interoperability with other standards based SOAP implementations.

This Appendix describes the provisioning Web service in detail and shows how to access it using the Web or by writing a Java or C# client. We provide an overview of the operations in the SOAP endpoint and describe how to use the Web interface. We show how to develop a Java client using the SOAP toolkit included with Identity Manager provisioning, followed by how to write a C# client using Mono. The sample source code for the Java client and associated ANT build file is provided.

### 20.1.1 Provisioning Web Service Overview

Identity Manager is composed of two main systems: the Identity Vault and the workflow application. The Identity Vault is capable of connecting to a large number of different systems such as databases, financial systems, and other enterprise applications, and keep these systems synchronized. The rules for synchronizing the remote systems can be very complex and the Identity Vault engine supports a sophisticated scripting language for expressing the rules.

The workflow application is composed of several subsystems. The User Application provides a user-interface for workflows. The User Application is a Web application for requesting and managing approval flows. The Web application runs in a portal, which also includes administration portlets. The workflow application contains a security layer, a directory abstraction layer and a logging subsystem, which can send log events to Novell Audit and Novell Sentinel. The workflow subsystem is responsible for executing approval flows. The User Application runs on an application server (for example, JBoss) and uses a database (for example, Oracle, MySQL) for persistence.

The Web service for the workflow system is only used by the user application driver, which is capable of listening to certain events emitted by the Identity Vault engine and convert these events into an appropriate SOAP message. For example, when a specific attribute in the Identity Vault

changes, the Identity Vault engine emits an event, which the User Application picks up from the subscriber channel. The user application driver then sends a SOAP message to the provisioning Web service to start a new approval flow.

## 20.1.2 Provisioning Web Service Method Categories

The methods provided by the provisioning Web service endpoint are divided into six categories:

**Table 20-1** *Provisioning Web Service Operation Categories*

Category	Description
Comments	Methods for retrieving comments and for adding a comment to a pending user activity
Configuration	Methods for getting and setting configuration parameters for the workflow system (for example, timeouts, thread pool settings).
Miscellaneous	Several unrelated methods (for example, for getting a JPG with a provisioning request's topology, for getting the XML definition of a provisioning request, and for getting the XML for the request form).
Processes	Methods for getting information about running and completed workflow processes.
Provisioning Requests	Methods for working with provisioning requests (for example, listing available provisioning requests, listing provisioning categories)
Work Entries	Methods for retrieving and manipulating work entries (items awaiting approval).

The methods provided by the provisioning Web service are described in detail in [Section 20.3, "Provisioning Web Service API,"](#) on page 390.

## 20.2 Developing Clients for the Provisioning Web Service

This section includes the following topics:

- ◆ [Section 20.2.1, "Web Access to the Provisioning Web Service,"](#) on page 380
- ◆ [Section 20.2.2, "A Java Client for the Provisioning Web Service,"](#) on page 382
- ◆ [Section 20.2.3, "Developing a Mono Client,"](#) on page 387
- ◆ [Section 20.2.4, "Sample Ant File,"](#) on page 389
- ◆ [Section 20.2.5, "Sample Log4J File,"](#) on page 390

### 20.2.1 Web Access to the Provisioning Web Service

A SOAP-based Web service is usually accessed by inserting a SOAP message in the body of an HTTP Post request. The Web service toolkit used to build the provisioning Web service also



supports access using HTTP GET. In other words, you can open the URL of the Web service endpoint in a browser and interact with the Web service. In particular, the provisioning Web service lets you invoke each of its operations.

## Accessing the Test Page

You can access the provisioning Web Service endpoint using a URL similar to the following:

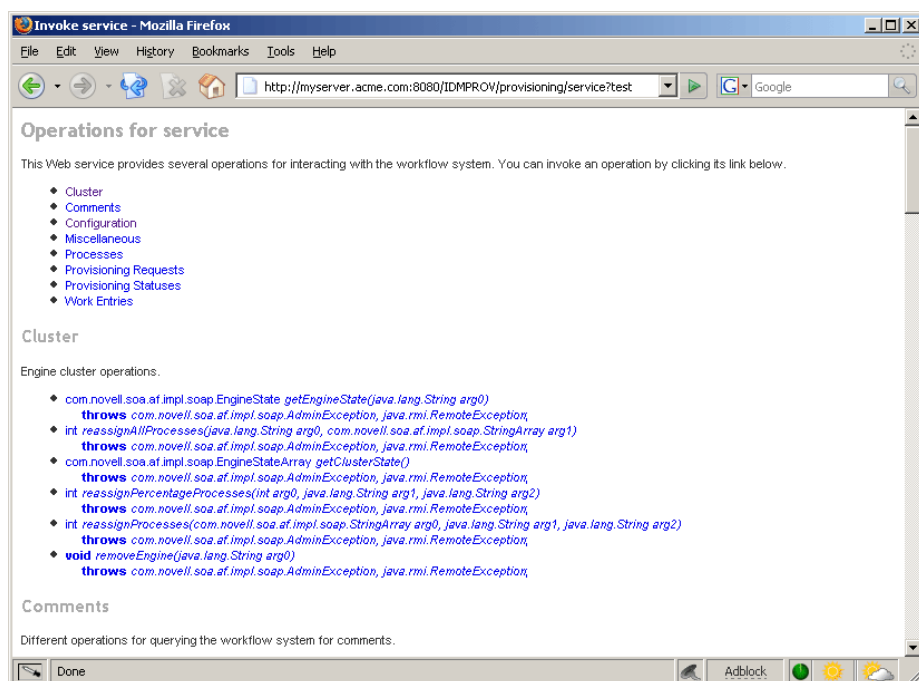
```
http://server:port/warcontext/provisioning/service?test
```

For example, if your server is named “myserver”, your User Application is listening on port 8080, and your User Application war file is named “IDMPROV”, the URL would be:

```
http://myserver:8080/IDMPROV/provisioning/service?test
```

The following page is displayed:

**Figure 20-1** Web Service Test Page



## Entering Arguments for Operations

To see an example of an operation that is particularly useful to invoke from the browser, scroll down to the *Miscellaneous* section and click *getGraph*.

---

**NOTE:** The Graphviz program must be installed on the computer where the application server and the IDM User Application is running. For more information about Graphviz, see [Graphviz \(http://www.graphviz.org\)](http://www.graphviz.org).

---

A page is displayed that allows you to enter the parameters for the *getGraph* method.

**Figure 20-2** Parameters for getGraph Method

### Enter Parameters to Invoke getGraph

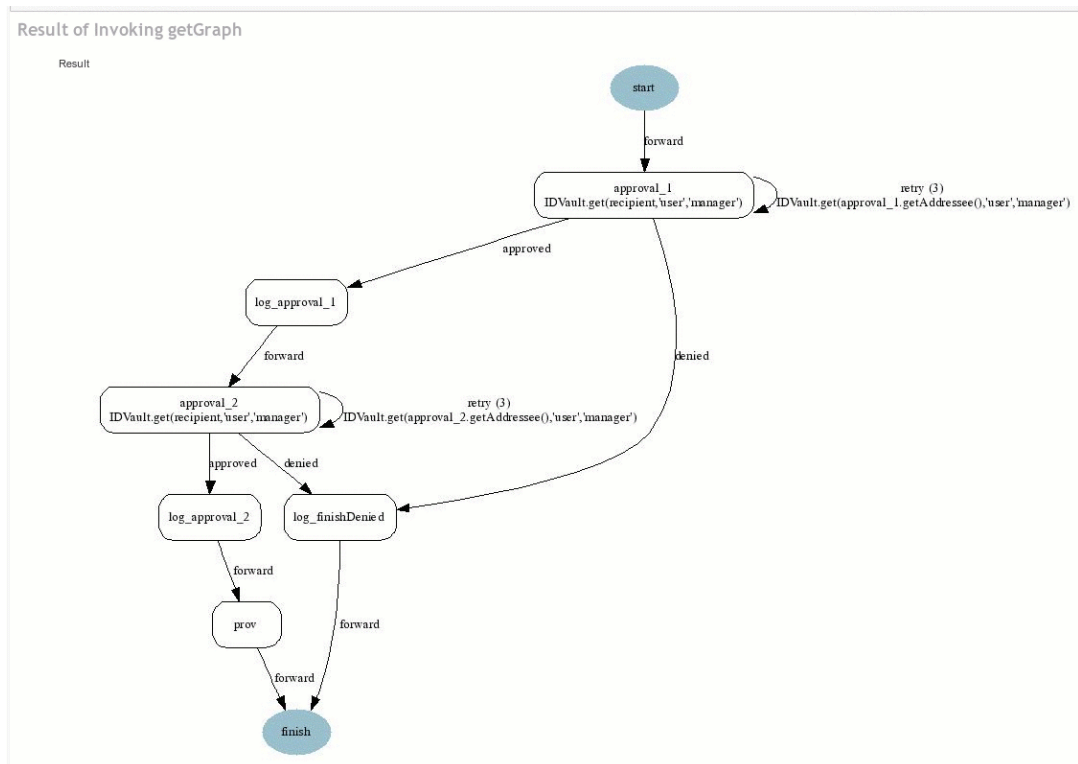
Get JPG image for workflow.

`processId` (java.lang.String):

[Back to home.](#)

The method takes one argument, which is the distinguished name of a provisioning request. Enter the DN, and the underlying workflow is displayed as a JPG file..

**Figure 20-3** Output of getGraph



## 20.2.2 A Java Client for the Provisioning Web Service

This section describes how to develop a simple Java client for the provisioning Web service, which lists all the processes in the workflow system. For complete source code for the client, see [“Sample Code for the Java Client” on page 386](#).

### Prerequisites

To develop a Java client you must install a supported Java Developer’s Kit (see [System Requirements for Identity Manager \(http://www.novell.com/documentation/idm35/](#)

<index.html?page=/documentation/idm35/install/data/b2mbjps.html>). Also, a client program needs the following JAR files:

```
activation.jar
commons-httpclient.jar
IDMfw.jar
log4j.jar
saaj-api.jar
wssdk.jar
commons-codec-1.3.jar
commons-logging.jar
jaxrpc-api.jar
mail.jar
workflow.jar
xpp3.jar
```

## Developing a Java Client

Developing a client that accesses a Web service consists of two steps:

- ◆ Get the stub, which is the object that represents the remote service
- ◆ Invoke one or more of the operations available in the remote service

The Java programming model for Web services is very similar to RMI. The first step is to lookup the stub using JNDI:

```
InitialContext ctx = new InitialContext();
ProvisioningService service = (ProvisioningService)
ctx.lookup("xmlrpc:soap:com.novell.soa.af.impl.soap.ProvisioningService");
Provisioning prov = service.getProvisioningPort();
```

The first line of code creates the initial context for JNDI lookups. The second line looks up the service object, which is a kind of factory that can be used to retrieve the stub for the provisioning Web service. The last line gets the provisioning stub from the service.

Before invoking an operation on the provisioning stub, it is necessary to set some properties, including the credentials used for authentication on the service, as well as the endpoint URL.

```
Stub stub = (Stub) prov;
// set username and password
stub._setProperty(Stub.USERNAME_PROPERTY, USERNAME);
stub._setProperty(Stub.PASSWORD_PROPERTY, PASSWORD);
// set the endpoint URL
stub._setProperty(Stub.ENDPOINT_ADDRESS_PROPERTY, url);
```

These and other stub properties are described in more detail in [“Frequently Used Stub Constants” on page 384](#). Now that we have a fully configured stub, we can invoke the `getAllProcesses` operation and dump information about each of the processes returned on the console:

```
// invoke the getAllProcesses method
ProcessArray array = prov.getAllProcesses();
Process[] procs = array.getProcess();
// print process array
System.out.println("list of all processes:");
```

```

if (procs != null) {
for (int i = 0; i < procs.length; i++) {
System.out.println(" process with request identifier " +
procs[i].getRequestId());
System.out.println(" initiator = " + procs[i].getInitiator());
System.out.println(" recipient = " + procs[i].getRecipient());
System.out.println(" processId = " + procs[i].getProcessId());
System.out.println(" created = " +
8
9
procs[i].getCreationTime().getTime());
if (null != procs[i].getCompletionTime()) {
System.out.println(" completed = " +
procs[i].getCompletionTime().getTime());
}
System.out.println(" approval status = " +
procs[i].getApprovalStatus());
System.out.println(" process status = " +
procs[i].getProcessStatus());
if (i != procs.length - 1)
System.out.println();
}
}
}

```

A method invocation on the stub results in a SOAP message being sent using the HTTP transport to the provisioning Web service. For operations that have arguments, the stub takes care of marshaling those Java objects into XML. The Web service returns a SOAP message, and the stub unmarshals the XML, in this case converting it into a ProcessArray Java object.

## Running the Client

The sample ANT build file has a target for running the client (see [“Sample Ant File” on page 389](#)). The client needs the JAR files described in [“Prerequisites” on page 382](#) to be in the CLASSPATH. You can change the code to have a different default address for the provisioning Web service SOAP endpoint, or simply specify it as a command line argument. For example:

```
ant -Durl=http://www.company.com:80/IDMProv/provisioning/service run
```

## Frequently Used Stub Constants

The `com.novell.soa.ws.portable.Stub` class (which is part of WSSDK) supports several properties that can be used to configure a stub instance (for example, to fine-tune aspects of the HTTP communication). The following table lists a small subset of these properties, which are frequently used:

**Table 20-2** Provisioning Web Service Stub Constants

Property	Type	Description
ENDPOINT_ADDRESS_PROPERTY	java.lang.String	The URL of the Web service. The URL protocol scheme can be HTTP or HTTPS depending on the requirements of the server. The path portion should be: <code>/IDMProv/provisioning/service</code>

Property	Type	Description
HTTP_HEADERS	java.util.Map	Additional HTTP headers as String name/value pairs.
HTTP_TIME_OUT	java.lang.Integer	The number of seconds to wait to establish a connection to the host before timing out.
HTTP_MAX_TOTAL_CONNECTIONS	java.lang.Integer	The number of concurrent connections that this client program can establish to all server hosts it accesses. The default limit is 20.
HTTP_MAX_HOST_CONNECTIONS	java.lang.Integer	The number of concurrent connections this client program can establish to an individual server host. The default limit is 2. This value may not exceed that of <code>HTTP_MAX_TOTAL_CONNECTIONS</code> , so if a client requires more than 20 connections to the server, it must also set <code>HTTP_MAX_TOTAL_CONNECTIONS</code> to the desired value.
USERNAME	java.lang.String	The user ID for HTTP authentication.
PASSWORD	java.lang.String	The password for HTTP authentication.
HTTP_PROXY_HOST	java.lang.String	The host DNS name of a proxy. Setting this property requires setting <code>HTTP_PROXY_PORT</code> as well.
HTTP_PROXY_PORT	java.lang.Integer	The port to use on a proxy. Setting this property requires setting <code>HTTP_PROXY_HOST</code> as well.
HTTP_PROXY_AUTH_SCHEME	java.lang.Integer	The authentication scheme (Basic or Digest) to use for a proxy.
HTTP_PROXY_USERNAME	java.lang.String	The user ID for HTTP authentication using a proxy.
HTTP_PROXY_PASSWORD	java.lang.String	The password for HTTP authentication via proxy.

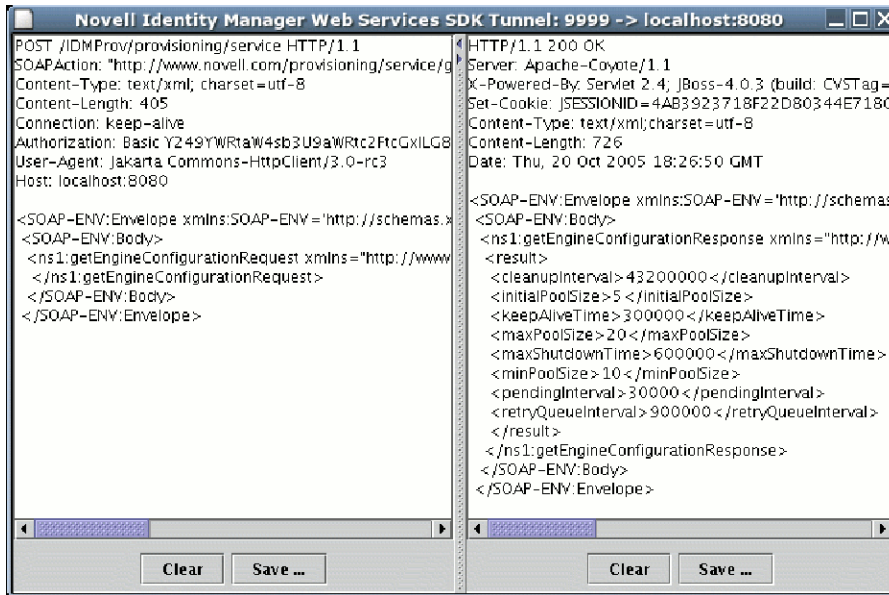
## The TCP Tunnel

The TCP Tunnel is a useful tool for looking at the SOAP messages that are exchanged between a client and a server. The ANT build file (see [“Sample Ant File” on page 389](#)) has a target for starting the tunnel. Once the tunnel starts you need to enter the port on which the tunnel will listen, and the host/port of the remote Web service. The default settings cause the tunnel to listen on port 9999 and connect to a service running on localhost port 8080. The client program (see [“Developing a Java Client” on page 383](#)) uses the first command line parameter to set the `ENDPOINT_ADDRESS_PROPERTY`. Using the default values, you can run the client using the following command, after starting the tunnel:

```
ant -Durl=http://localhost:9999/IDMProv/provisioning/service run
```

[Figure 20-4](#) shows the TCP tunnel with a request SOAP message in the left panel and the message in the right panel.

**Figure 20-4** TCP Tunnel



### Sample Code for the Java Client

The following is the code for the Java client for listing all processes in the workflow system package com.novell.examples;

```
import javax.naming.InitialContext;
import com.novell.soa.af.impl.soap.AdminException;
import com.novell.soa.af.impl.soap.Process;
import com.novell.soa.af.impl.soap.ProcessArray;
import com.novell.soa.af.impl.soap.Provisioning;
import com.novell.soa.af.impl.soap.ProvisioningService;
import com.novell.soa.ws.portable.Stub;
public class Client
{
private static final String USERNAME = "admin";
private static final String PASSWORD = "test";
public static void main(String[] args)
{
try {
String url = args.length > 0 ? args[0] :
"http://localhost:8080/IDMProv/provisioning/service";
listProcesses(url);
} catch (AdminException ex) {
System.out.println("command failed: " + ex.getReason());
} catch (Exception ex) {
ex.printStackTrace();
}
}
private static void listProcesses(String url)
throws Exception
{
// get the stub
InitialContext ctx = new InitialContext();
```

```

ProvisioningService service = (ProvisioningService)
ctx.lookup("xmlrpc:soap:com.novell.soa.af.impl.soap.ProvisioningService");
Provisioning prov = service.getProvisioningPort();
Stub stub = (Stub) prov;
// set username and password
stub._setProperty(Stub.USERNAME_PROPERTY, USERNAME);
stub._setProperty(Stub.PASSWORD_PROPERTY, PASSWORD);
// set the endpoint URL
stub._setProperty(Stub.ENDPOINT_ADDRESS_PROPERTY, url);
// invoke the getAllProcesses method
ProcessArray array = prov.getAllProcesses();
Process[] procs = array.getProcess();
// print process array
System.out.println("list of all processes:");
if (procs != null) {
for (int i = 0; i < procs.length; i++) {
System.out.println(" process with request identifier " +
procs[i].getRequestId());
System.out.println(" initiator = " + procs[i].getInitiator());
System.out.println(" recipient = " + procs[i].getRecipient());
System.out.println(" processId = " + procs[i].getProcessId());
System.out.println(" created = " +
procs[i].getCreationTime().getTime());
if (null != procs[i].getCompletionTime()) {
System.out.println(" completed = " +
procs[i].getCompletionTime().getTime());
}
}
}
17
18
System.out.println(" approval status = " +
procs[i].getApprovalStatus());
System.out.println(" process status = " +
procs[i].getProcessStatus());
if (i != procs.length - 1)
System.out.println();
}
}
}
}

```

### 20.2.3 Developing a Mono Client

The previous section described how to create a Java client using the Web service toolkit and the pre-compiled stub code included with Identity Manager. This section describes how to develop a client using just the WSDL for the provisioning Web service. This example uses Mono and creates a C# client that changes the default retention time of 120 days for completed workflows to 30.

#### Prerequisites

To get started, you need to download Mono and install it on your system (see the [Mono Project Website \(http://www.mono-project.com/\)](http://www.mono-project.com/)). The version of Mono available at the time this document was written did not support complex schema types in which an element has the nillable attribute set

to true. Because this construct is used in the provisioning WSDL, you must manually edit the Provisioning.WSDL file and remove the three places where `nillable="true"` is used.

## Generating the Stub

Compared to the Java client developed in [“Developing a Java Client” on page 383](#), there is one additional step required when building the C# client. Since the stub for accessing the Web service SOAP endpoint is not provided, you must generate the stub from the WSDL document. Mono includes a compiler called `wSDL` that processes the WSDL file and creates the stub. You can download the WSDL file from your User Application server by accessing the following URL:  
`http://myserver:8080/IDMProv/provisioning/service?wSDL`

Replace “myserver” with the name of your server, and “IDMProv” with the name of your User Application war file.

Compile the WSDL file using the following command:

```
wSDL Provisioning.wSDL
```

This will generate a C# file called `ProvisioningService.cs`, which you need to compile into a DLL using the following Mono C# compiler command:

```
mcs /target:library /r:System.Web.Services.dll ProvisioningService.cs
```

Compared to the Java client, the resulting `ProvisioningService.dll` file is the equivalent of `workflow.jar`, which contains the stub code and supporting classes for accessing the provisioning Web service. The following is the source code for the simple C# client that sets the flow retention time and displays the new value on the console:

```
using System;
using System.Net;
class provclient {
public static void Main(string [] args) {
// create the provisioning service proxy
ProvisioningService service = new ProvisioningService();
// set the credentials for basic authentication
service.Credentials = new NetworkCredential("admin", "test");
service.PreAuthenticate = true;
// set the value for completed request retention to 30 days
setCompletedProcessTimeoutRequest req = new
setCompletedProcessTimeoutRequest();
11
12
req.arg0 = 30;
service.setCompletedProcessTimeout(req);
// display the new value on the console
getCompletedProcessTimeoutResponse res =
service.getCompletedProcessTimeout(new
getCompletedProcessTimeoutRequest());
Console.WriteLine(res.result);
}
}
```

You need to edit the file using the administrator credentials on your deployed Identity Manager system. Compile the client using the following command:

```
mcs /r:ProvisioningService.dll /r:System.Web provclient.cs
```



This generates the `provclient.exe` file.

## Running the Client

Use the following command to run the client:

```
mono provclient.exe
```

## 20.2.4 Sample Ant File

The sample Ant file includes useful targets for extracting the necessary JAR files from the Identity Manager installation, compiling and running the Java client, and for launching the TCP Tunnel.

```
<?xml version="1.0"?>
<project name="client" default="all" basedir=".">
<target name="all" depends="clean, extract, compile"></target>
<!-- main clean target -->
<target name="clean">
<delete quiet="true" dir="classes"/>
<delete quiet="true" dir="lib"/>
</target>
<!-- init sets up the build environment -->
<target name="init">
<mkdir dir="classes"/>
<copy todir="${basedir}/lib">
<fileset dir="${basedir}" includes="log4j.properties"/>
</copy>
<!-- classpath -->
<path id="CLASSPATH">
<pathelement location="${basedir}/classes"/>
<fileset dir="${basedir}/lib" includes="*.jar"/>
</path>
</target>
<!-- extract -->
<target name="extract">
<property name="idm.home" value="/opt/novell/idm3"/>
<property name="jboss.lib" value="${idm.home}/jboss-4.0.3/server/
IDMProv/lib"/>
<mkdir dir="lib"/>
<unzip src="${idm.home}/IDMProv.war" dest="${basedir}/lib">
<patternset>
<include name="WEB-INF/lib/commons-codec-1.3.jar"/>
<include name="WEB-INF/lib/commons-httpclient.jar"/>
<include name="WEB-INF/lib/commons-logging.jar"/>
<include name="WEB-INF/lib/jaxrpc-api.jar"/>
<include name="WEB-INF/lib/saaj-api.jar"/>
<include name="WEB-INF/lib/xpp3.jar"/>
<include name="WEB-INF/lib/workflow.jar"/>
<include name="WEB-INF/lib/wssdk.jar"/>
<include name="WEB-INF/lib/IDMfw.jar"/>
</patternset>
</unzip>
<move todir="${basedir}/lib">
<fileset dir="${basedir}/lib/WEB-INF/lib" includes="*.jar"/>
```

```

</move>
<delete quiet="true" dir="${basedir}/lib/WEB-INF"/>
<copy todir="${basedir}/lib">
<fileset dir="${jboss.lib}" includes="activation.jar, mail.jar,
log4j.jar"/>
</copy>
</target>
18
19
<!-- tunnel -->
<target name="tunnel" depends="init">
<java classname="com.novell.soa.ws.impl.tools.tcptunnel.Tunnel"
fork="true"
spawn="true">
<classpath refid="CLASSPATH"/>
</java>
</target>
<!-- compile -->
<target name="compile" depends="init">
<javac srcdir="${basedir}" destdir="classes"
includes="Client.java">
<classpath refid="CLASSPATH"/>
</javac>
</target>
<!-- run -->
<target name="run" depends="init">
<property name="url" value="http://localhost:8080/IDMProv/
provisioning/service"/>
<java classname="com.novell.examples.Client" fork="true">
<arg line="${url}"/>
<classpath refid="CLASSPATH"/>
</java>
</target>
</project>

```

## 20.2.5 Sample Log4J File

The following log4j file sets the default log level to “error”:

```

log4j.rootCategory=ERROR, R
log4j.appender.R=org.apache.log4j.ConsoleAppender
log4j.appender.R.layout=org.apache.log4j.PatternLayout
log4j.appender.R.layout.ConversionPattern=%-5p: %m%n

```

## 20.3 Provisioning Web Service API

This section provides details about the Provisioning Web service methods.

All of the methods throw `com.novell.soa.af.impl.soap.AdminException` and `java.rmi.RemoteException`. To improve readability, the `throws` clause has been omitted from the method signatures.

This section includes the following topics:

- ◆ [Section 20.3.1, “Processes,” on page 391](#)
- ◆ [Section 20.3.2, “Provisioning,” on page 401](#)
- ◆ [Section 20.3.3, “Work Entries,” on page 414](#)
- ◆ [Section 20.3.4, “Comments,” on page 431](#)
- ◆ [Section 20.3.5, “Configuration,” on page 437](#)
- ◆ [Section 20.3.6, “Miscellaneous,” on page 441](#)
- ◆ [Section 20.3.7, “Cluster,” on page 444](#)

## 20.3.1 Processes

This section provides reference information for each Processes method. The methods include:

- ◆ [“getProcessesByQuery” on page 391](#)
- ◆ [“getProcessesByStatus” on page 392](#)
- ◆ [“getProcesses” on page 392](#)
- ◆ [“getAllProcesses” on page 393](#)
- ◆ [“getProcessesArray” on page 394](#)
- ◆ [“getProcessesById” on page 396](#)
- ◆ [“terminate” on page 396](#)
- ◆ [“getProcess” on page 397](#)
- ◆ [“getProcessesByCreationTime” on page 398](#)
- ◆ [“getProcessesByApprovalStatus” on page 398](#)
- ◆ [“getProcessesByRecipient” on page 399](#)
- ◆ [“getProcessesByInitiator” on page 399](#)
- ◆ [“setResult” on page 399](#)
- ◆ [“getProcessesByCreationInterval” on page 401](#)

### getProcessesByQuery

Used to get information about processes.

#### Method Signature

```
com.novell.soa.af.impl.soap.ProcessArray  
getProcessesByQuery(com.novell.soa.af.impl.soap.T_ProcessInfoQuery  
query, int maxRecords)
```

#### Example

```
//  
  
// Query information about processes for a user that are running  
and  
// have not been approved yet.  
String logic = "AND";
```

```

        T_ProcessInfoOrder order = T_ProcessInfoOrder.APPROVAL_STATUS;
        int CHOICE_SIZE = 4;
        Integer approvalStatusInteger = new
Integer(ProcessConstants.PROCESSING);
        Integer processStatusInteger = new
Integer(ProcessConstants.RUNNING);
        //
        // Setup the query with the above params
        T_ProcessInfoQueryChoice [] choice = new
T_ProcessInfoQueryChoice[CHOICE_SIZE];
        choice[0] = new T_ProcessInfoQueryChoice();
        choice[0].setApprovalStatus(approvalStatusInteger);
        choice[1] = new T_ProcessInfoQueryChoice();
        choice[1].setProcessStatus(processStatusInteger);
        choice[2] = new T_ProcessInfoQueryChoice();
        choice[2].setRecipient(recipient);
        choice[3] = new T_ProcessInfoQueryChoice();
        choice[3].setRequestId(requestId);

        int maxRecords = -1;
        T_ProcessInfoQuery processInfoQuery =
            new T_ProcessInfoQuery(T_Logic.fromString(logic),
order, choice);
        ProcessArray processArray =
stub.getProcessesByQuery(processInfoQuery, maxRecords);

```

### **getProcessesByStatus**

Used to get information about processes with a specified status (for example, running processes).

#### Method Signature

```

public com.novell.soa.af.impl.soap.ProcessArray
getProcessesByStatus(com.novell.soa.af.impl.soap.T_ProcessStatus
status)

```

#### Example

```

        T_ProcessStatus processStatus = T_ProcessStatus.Running;
        //
        // Get processes by status
        ProcessArray processArray =
stub.getProcessesByStatus(processStatus);
        Process [] process = processArray.getProcess();

```

### **getProcesses**

Used to get information about processes, specified by processID.

#### Method Signature

```

com.novell.soa.af.impl.soap.ProcessArray getProcesses(java.lang.String
id, long time, com.novell.soa.af.impl.soap.T_Operator op,
java.lang.String initiator, java.lang.String recipient)

```

## Parameters

Parameter	Description
processId	The process Id (java.lang.String).
creationTime	The time at which the process was started (long).
op	The operator to use. The operators are: EQ - equals LT - less than LE - less than or equal to GT - greater than GE - greater than or equal to
initiator	The initiator of the workflow.
recipient	The recipient of the approval activity.

### Example

```
int processMatchCount = 0;
T_Operator operator = T_Operator.GT;
long currentTimeInMillis = System.currentTimeMillis();
String [] requestIds = requestIdArray.getString();
//
// Initialize and start a provisioning request
HashMap provMap = new HashMap();
provMap.put(Helper.RECIPIENT, recipient);
provMap.put("Provisioning_Request_To_Start_Key", "Enable
Active Directory Account (Mgr Approve-No Timeout)");
//
// Start request
// Calls method startProvisioningRequest on the provUtils
// utility object which refers to a utility class that does not
// ship with the Identity Manager User Application.
String requestId = provUtils.startProvisioningRequest(provMap, null);
sleep(5);

Process process = stub.getProcess(requestId);
if(process != null)
{
    String processId = process.getProcessId();
    String initiator = process.getInitiator();

    ProcessArray processArray = stub.getProcesses(processId,
currentTimeInMillis, operator, initiator, recipient);
}
```

### getAllProcesses

Used to get information about all running and completed provisioning requests.

## Method Signature

```
com.novell.soa.af.impl.soap.ProcessArray getAllProcesses()
```

## Example

```
ProcessArray array = stub.getAllProcesses();
Process [] processes = array.getProcess();
if(_process != null)
{
    sb = new StringBuffer();
    sb.append("\nProcess List:");
    for(int index = 0; index < _process.length; index++)
    {
        String processId = _process[index].getProcessId();
        String approvalStatus =
        _process[index].getApprovalStatus();
        Calendar completionTime =
        _process[index].getCompletionTime();
        Calendar creationTime = _process[index].getCreationTime();
        String engineId = _process[index].getEngineId();
        String proxy = _process[index].getProxy();
        String initiator = _process[index].getInitiator();
        String processName = _process[index].getProcessName();
        String processStatus = _process[index].getProcessStatus();
        String p_recipient = _process[index].getRecipient();
        String p_requestId = _process[index].getRequestId();
        int valueOfapprovalStatus =
        _process[index].getValueOfApprovalStatus();
        int valueOfprocessStatus =
        _process[index].getValueOfProcessStatus();
        String version = _process[index].getVersion();
    }
}
```

## getProcessesArray

Used to limit the number of processes returned. If the limit you specify is less than the system limit, the number you specify is returned. If you exceed the system limit, the Workflow Engine returns the system limit. If the limit you specify is less than or equal to 0, the Workflow Engine returns all processes.

## Method Signature

```
com.novell.soa.af.impl.soap.ProcessArray getProcessesArray(int
maxRecords);
```

## Example

```
/**
 * Method to augment the getAllProcesses() method that impose
limits
 * on the number of processes returned.
 * @throws TestProgramException
 */
public void adding_Limits_To_getProcessArray_TestCase()
throws TestProgramException
{
```

```

        String recipient =
ServiceUtils.getInstance().getLoginData().getUsername(LoginData.RECIPI
ENT_TYPE);
        String requestNameToStart =
provUtils.getProvisioningResourceNameForRecipient(recipient,
                "Enable Active Directory");
        //
        // Get the stub
        Provisioning stub =
ServiceUtils.getInstance().getProvisioningStub();
        try
        {
            //
            // Start multiple requests
            final int NUMBER_OF_REQUESTS_TO_START = 2;

            Map map = MapUtils.createAndSetMap(new Object[] {
                Helper.RECIPIENT, recipient,

IProvisioningConstants.PROVISIONING_REQUEST_TO_START,
requestNameToStart});
            //
            // Start request(s)
            StringArray requestIdArray =
                provUtils.startMultipleProvisioningRequests(map, null,
NUMBER_OF_REQUESTS_TO_START);
            LoggerUtils.sleep(3);
            LoggerUtils.sendToLogAndConsole("Started " +
NUMBER_OF_REQUESTS_TO_START + " provisioning requests");
            //
            // New method to limit the number of processes returned
            //
            // Test Results : maxProcesses <= 0 returns all processes
            //                    maxProcesses up to system limit returns
maxProcess count
            //                    maxProcesses > system limit returns system
limit

            int maxProcesses = 10;
            ProcessArray processArray =
stub.getProcessesArray(maxProcesses);
            Process [] processes = processArray.getProcess();
            if(processes != null)
            {
                LoggerUtils.sendToLogAndConsole("Process count
returned: " + processes.length);
                Assert.assertEquals("Error: Processes returned
shouldn't exceed max count.",
                    maxProcesses, processes.length);
            }
        }
        catch(AdminException error)
        {
            RationalTestScript.logError(error.getReason() );
            throw new TestProgramException(error.getReason() );

```

```

    }
    catch(RemoteException error)
    {
        RationalTestScript.logError(error.getMessage() );
        throw new TestProgramException(error.getMessage() );
    }
}

```

## getProcessesById

Used to get information about a specific process, specified by the Process Id.

### Method Signature

```

com.novell.soa.af.impl.soap.ProcessArray
getProcessesById(java.lang.String id)

```

### Example

```

Process [] allProcesses = stub.getAllProcesses().getProcess();
if(allProcesses != null)
{
    String processId = allProcesses[0].getProcessId;
    ProcessArray array = stub.getProcessesById(processId);
    Process [] processes = array.getProcess();
}

```

## terminate

Used to terminate a running provisioning request.

### Method Signature

```

void terminate(java.lang.String requestId,
com.novell.soa.af.impl.soap.T_TerminationType state, java.lang.String
comment)

```

### Parameters

Parameter	Description
requestId	The Id of the provisioning request.
state	The reason for terminating the process. The choices are:  RETRACT  ERROR
comment	Adds a comment about the terminate action.

### Example

```

//
// Initialize and start a provisioning request
HashMap provMap = new HashMap();
provMap.put(Helper.RECIPIENT, recipient);

```



```

    provMap.put("Provisioning_Request_To_Start_Key", "Enable Active
Directory Account (Mgr Approve-No Timeout)");
    //
    // Start request
    // Calls method startProvisioningRequest on the provUtils
    // utility object which refers to a utility class that does not
    // ship with the Identity Manager User Application.
String requestId = provUtils.startProvisioningRequest(provMap, null);
    sleep(5);
    //
    // Now retract the request
    T_TerminationType terminationType = T_TerminationType.RETRACT;
    stub.terminate(requestId, terminationType,
terminationType.getValue() + " the request");

```

## getProcess

Used to get information about a running or completed provisioning request, specified by Request ID.

### Method Signature

```

com.novell.soa.af.impl.soap.Process getProcess(java.lang.String
requestId)

```

### Example

```

    //
    // Initialize and start a provisioning request
    HashMap provMap = new HashMap();
    provMap.put(Helper.RECIPIENT, recipient);
    provMap.put("Provisioning_Request_To_Start_Key", "Enable Active
Directory Account (Mgr Approve-No Timeout)");
    //
    // Start request
    // Calls method startProvisioningRequest on the provUtils
    // utility object which refers to a utility class that does not
    // ship with the Identity Manager User Application.
String requestId = provUtils.startProvisioningRequest(provMap,
null);
    sleep(5);

Process process = stub.getProcess(requestId);
if(process != null)
{
    boolean bMatchProcess = false;
    if( (recipient.compareTo(process.getRecipient()) == 0) &&
(requestId.compareTo(process.getRequestId()) == 0) )
    {
        bMatchProcess = true;
    }
    if(bMatchProcess)
    {

```

```

        String msg = "Found process with requestId : " + requestId;
        LoggerUtils.sendToLogAndConsole(msg);
    }
    //
    // Assert if we could not find a match
    Assert.assertTrue("Could not find process with request id: " +
requestId, bMatchProcess);
}

```

### getProcessesByCreationTime

Used to get information about processes created between the current time and the time at which the workflow process was created.

#### Method Signature

```

com.novell.soa.af.impl.soap.ProcessArray
getProcessesByCreationTime(long time,
com.novell.soa.af.impl.soap.T_Operator op)

```

#### Parameters

Parameter	Description
creationTime	The time at which the process was started.
op	The operator to use. The operators are: EQ - equals LT - less than LE - less than or equal to GT - greater than GE - greater than or equal to

#### Example

```

    T_Operator operator = T_Operator.GT;
    //
    // Get processes with operator relative to the current time
    long currentTime = System.currentTimeMillis(); //
currentDateTime.getTime();
    ProcessArray processArray =
stub.getProcessesByCreationTime(currentTime, operator);

```

### getProcessesByApprovalStatus

Used to get information about processes with a specified approval status (Approved, Denied, or Retracted).

#### Method Signature

```

com.novell.soa.af.impl.soap.ProcessArray
getProcessesByApprovalStatus(com.novell.soa.af.impl.soap.T_ApprovalSta
tus status)

```

## Example

```
T_ApprovalStatus approvalStatus = T_ApprovalStatus.Approved;
//
// Get all the processes based upon approval status above
ProcessArray processArray =
stub.getProcessesByApprovalStatus(approvalStatus);
Process [] processes = processArray.getProcess();
```

## getProcessesByRecipient

Used to get information about processes that have a specific recipient Id.

### Method Signature

```
com.novell.soa.af.impl.soap.ProcessArray
getProcessesByRecipient(java.lang.String recipient)
```

## Example

```
String recipient = "cn=ablake,ou=users,ou=idmsample-
komodo,o=novell";

//
// Get processes by recipient
ProcessArray processArray =
stub.getProcessesByRecipient(recipient);
Process [] process = processArray.getProcess();
```

## getProcessesByInitiator

Used to get information about processes that have a specific initiator Id.

### Method Signature

```
com.novell.soa.af.impl.soap.ProcessArray
getProcessesByInitiator(java.lang.String initiator)
```

## Example

```
String initiator = "cn=admin,ou=idmsample-komodo,o=novell";

//
// Get processes by initiator
ProcessArray processArray =
stub.getProcessesByInitiator(initiator);
Process [] process = processArray.getProcess();
```

## setResult

Used to set the entitlement result (approval status) of a previously completed provisioning request.

### Method Signature

```
void setResult(java.lang.String requestId,
com.novell.soa.af.impl.soap.T_EntitlementState state,
com.novell.soa.af.impl.soap.T_EntitlementStatus status,
java.lang.String message)
```

## Parameters

Parameter	Description
requestId	The Id of the provisioning request.
state	The state of the provisioning request. The possible values are:  Unknown Granted Revoked
status	The status of the provisioning request. The possible values are:  Unknown Success Warning Error Fatal Submitted
message	A message about the entitlement result.

## Example

```
//
// Initialize and start a provisioning request
HashMap provMap = new HashMap();
provMap.put(Helper.RECIPIENT, recipient);
provMap.put("Provisioning_Request_To_Start_Key", "Enable Active
Directory Account (Mgr Approve-No Timeout)");
//
// Start request
// Calls method startProvisioningRequest on the provUtils
// utility object which refers to a utility class that does not
// ship with the Identity Manager User Application.
String requestId = provUtils.startProvisioningRequest(provMap,
null);
sleep(5);

//
// Get the process id for this running process
Process process = stub.getProcess(requestId);
String processId = null;
if (process != null)
    processId = process.getProcessId();
//
// Reset the state of the provisioning request
T_EntitlementState newEntitlementState =
T_EntitlementState.Revoked;
T_EntitlementStatus newEntitlementStatus =
T_EntitlementStatus.Success;
String comment = "Revoked the provisioning request";
```

```
    stub.setResult(processId, newEntitlementState,  
newEntitlementStatus, comment);
```

## getProcessesByCreationInterval

Used to get information about processes started between two specified times.

### Method Signature

```
com.novell.soa.af.impl.soap.ProcessArray  
getProcessesByCreationInterval(long start, long end)
```

### Parameters

Parameter	Description
startTime	The start time (YYYY/MM/DD).
endTime	The end time (YYYY/MM/DD).

### Example

```
    long startTime = System.currentTimeMillis();  
    //  
    // Initialize and start a provisioning request  
    HashMap provMap = new HashMap();  
    provMap.put(Helper.RECIPIENT, recipient);  
    provMap.put("Provisioning_Request_To_Start_Key", "Enable Active  
Directory Account (Mgr Approve-No Timeout)");  
    //  
    // Start request  
    // Calls method startProvisioningRequest on the provUtils  
    // utility object which refers to a utility class that does not  
    // ship with the Identity Manager User Application.  
    String requestId = provUtils.startProvisioningRequest(provMap,  
null);  
    sleep(5);  
  
    long endTime = System.currentTimeMillis();  
    //  
    // Get all the processes between the start and end time  
    ProcessArray processArray =  
stub.getProcessesByCreationInterval(startTime, endTime);  
    Process [] processes = processArray.getProcess();
```

## 20.3.2 Provisioning

This section provides reference information for each Provisioning method. The Provisioning methods include:

- ◆ [“multiStart” on page 402](#)
- ◆ [“start” on page 403](#)
- ◆ [“getAllProvisioningRequests” on page 405](#)

- ◆ “getProvisioningRequests” on page 406
- ◆ “getProvisioningCategories” on page 407
- ◆ “startAsProxy” on page 407
- ◆ “getProvisioningStatuses” on page 408
- ◆ “startWithDigitalSignature” on page 410
- ◆ “startAsProxyWithDigitalSignature” on page 411
- ◆ “startWithCorrelationId” on page 413

## multiStart

Used to start a workflow request for each specified recipient.

### Method Signature

```
com.novell.soa.af.impl.soap.StringArray multiStart(java.lang.String
processId, com.novell.soa.af.impl.soap.StringArray recipients,
com.novell.soa.af.impl.soap.DataItemArray items)
```

### Parameters

Parameter	Description
processId	The Id of the provisioning request to start.
recipients	The DN of each recipient.
dataItem	The list of data items for the provisioning request.

### Example

```
ProvisioningRequestArray requestArray =
stub.getAllProvisioningRequests(recipient);

//
// If there are some then,
if(requestArray != null)
{
    String Id = "";
    StringArray requestIdStringArray = null;
    String [] listOfRecipients = {recipient, addressee};
    //
    // Select a provisioning resource
    String requestNameToStart = "Enable Active Directory Account
(Mgr Approve-No Timeout)";
    //
    // Loop thru and find the request that we want to start
    ProvisioningRequest [] requests =
requestArray.getProvisioningrequest();
    for(int index = 0; index < requests.length; index++)
    {
        //
        // Is this the name of the request to start?
        if(requests[index].getName().compareTo(requestNameToStart)
```

```

== 0)
    {
        //
        // Get the current associated data items. Replicate a
new
        // dataitem array excluding the null values.
        Id = requests[index].getId();
        DataItem [] dataItem =
requests[index].getItems().getDataitem();
        if(dataItem != null)
        // Call method replicateDataItemArray on the
        // provUtils utility object, which refers to a
        // utility class that does not ship with the
        // Identity Manager User Application.
        {
            DataItemArray newDataItemArray =
provUtils.replicateDataItemArray(dataItem);
            //
            // Create a string array initializing with multiple
recipients
            StringArray listOfRecipientsStringArray = new
StringArray(listOfRecipients);
            //
            // Start the request for multiple recipients
            logStep("Calling stub.multiStart(" + Id +
",listOfRecipientsStringArray,newDataItemArray)");
            requestIdStringArray = stub.multiStart(Id,
listOfRecipientsStringArray, newDataItemArray);
        }
    }
}

```

## start

Used to start a provisioning request.

### Method Signature

```
java.lang.String start(java.lang.String processId, java.lang.String
recipient, com.novell.soa.af.impl.soap.DataItemArray items)
```

### Parameters

Parameter	Description
processId	The Id of the provisioning request to start.
recipient	The DN of each recipient.
dataItem	The list of data items for the provisioning request.

### Example

```

//
// Initialize and start a provisioning request

```

```

        HashMap provMap = new HashMap();
        provMap.put(Helper.RECIPIENT, recipient);
        provMap.put("Provisioning_Request_To_Start_Key", "Enable
Active Directory Account (Mgr Approve-No Timeout)");
        //
        // Start request
        // Calls method startProvisioningRequest on the provUtils
        // utility object which refers to a utility class that does not
        // ship with the Identity Manager User Application.
        String requestId = provUtils.startProvisioningRequest(provMap,
null);
        sleep(5);

```

The example above calls the startProvisioningRequest method. This method is not part of the IDM User Application. We show it here to finish illustrating the example:

```

/**
 *Method to start a provisioning request using the supplied
 *Map and dataitem object. Handling of digital certificate
 *resources is also handled.
 * @param _map
 * @param _in_dataItem
 * @return String
 * @throws TestProgramException
 */
public String startProvisioningRequest(Map _map, DataItem []
_in_dataItem) throws TestProgramException
{
    String requestId = null;
    try
    {
        String recipient = (String)_map.get(Helper.RECIPIENT);
        String requestToStart =
(String)_map.get(IProvisioningConstants.PROVISIONING_REQUEST_TO_START)
;
        String proxyUser
=(String)_map.get(IWorkflowConstants.PROXY_USER);
        String digitalSignature =
(String)_map.get(IDigitalSignatureConstants.DIGITAL_SIGNATURE);
        RationalTestScript.logInfo("Step: Calling
startProvisioningRequest(_map)");
        //
        //Get the stub
        Provisioning stub =
ServiceUtils.getInstance().getProvisioningStub();
        //
        //Get all the available resource requests for the recipient
        RationalTestScript.logInfo("Step: Calling
stub.getAllProvisioningRequests(" + recipient + ")");
        ProvisioningRequestArray requestArray =
stub.getAllProvisioningRequests(recipient);

        if(requestArray != null)
        {
            //

```



```

        //Get the provisioning request from the array
        ProvisioningRequest request =
getProvisioningRequestFromArray(requestArray, requestToStart);
        if(request != null)
        {
            DataItem [] dataItem = null;
            DataItemArray newDataItemArray = null;
            //
            // If the supplied data item is null then just replicate
            // what currently exists with the request.
            if(_in_dataItem == null)
            {
                //
                // Use the current data item associated with the request
                dataItem = request.getItems().getDataitem();
                if(dataItem != null)
                {
                    newDataItemArray = replicateDataItemArray(dataItem);
                }
            }
            else
            {
                //
                // Set the incoming data item array
                newDataItemArray = new DataItemArray();
                newDataItemArray.setDataitem(_in_dataItem);
            }
            //
            // Start the Provisioning request for the recipient
            if(proxyUser == null && digitalSignature == null)
            {
                RationalTestScript.logInfo("Step: Calling stub.start(" +
request.getId() + "," + recipient + "dataItemArray)");
                requestId = stub.start(
                    request.getId(),
                    recipient,
                    newDataItemArray);
            }
            else if(proxyUser != null && digitalSignature == null)
            }
        }
    }
}

```

## getAllProvisioningRequests

Used to return an array of available provisioning requests.

### Method Signature

```

com.novell.soa.af.impl.soap.ProvisioningRequestArray
getAllProvisioningRequests(java.lang.String recipient)

```

## Example

```
//  
  
// Get all the provisioning requests for this recipient  
  
ProvisioningRequestArray provReqArray =  
stub.getAllProvisioningRequests(recipient);  
ProvisioningRequest [] provRequest =  
provReqArray.getProvisioningrequest();  
if(provRequest != null)  
{  
    String description = provRequest[0].getDescription();  
    String category = provRequest[0].getCategory();  
    String digitalSignatureType =  
provRequest[0].getDigitalSignatureType();  
    String requestId = provRequest[0].getId();  
    DataItemArray itemArray = provRequest[0].getItems();  
    String legalDisclaimer = provRequest[0].getLegalDisclaimer();  
    String name = provRequest[0].getName();  
    String operation = provRequest[0].getOperation();  
}
```

## getProvisioningRequests

Used to return an array of provisioning requests for a specified category and operation.

### Method Signature

```
com.novell.soa.af.impl.soap.ProvisioningRequestArray  
getProvisioningRequests(java.lang.String recipient, java.lang.String  
category, java.lang.String operation)
```

### Parameters

Parameter	Description
recipient	The recipient of the provisioning request.
category	The category of the provisioning request.
operation	The provisioning request operation (0=Grant, 1=Revoke, 2=Both)

## Example

```
String operation = IProvisioningRequest.GRANT;  
try  
{  
    //  
    // Get the stub  
    Provisioning stub =  
ServiceUtils.getInstance().getProvisioningStub();  
    logStep("Calling stub.getProvisioningCategories()");  
    StringArray categoriesStringArray =  
stub.getProvisioningCategories();
```

```

String [] categories = categoriesStringArray.getString();
//
// Loop thru and get the provisioning requests for each
category
for(int index = 0; index < categories.length; index++)
{
    //
    // Get the provisioning request based upon recipient
    logStep("Calling stub.getProvisioningRequests(" + recipient
+ "," + categories[index] + "," + operation + ")");
    ProvisioningRequestArray provRequestArray =
stub.getProvisioningRequests(recipient, categories[index], operation);
    ProvisioningRequest [] provRequests =
provRequestArray.getProvisioningrequest();
}

```

### getProvisioningCategories

Used to get the list of available provisioning categories.

#### Method Signature

```
com.novell.soa.af.impl.soap.StringArray getProvisioningCategories()
```

#### Example

```

StringArray categoriesStringArray =
stub.getProvisioningCategories();
String [] categories = categoriesStringArray.getString();

```

### startAsProxy

Used to start a workflow as a proxy.

#### Method Signature

```
java.lang.String startAsProxy(java.lang.String processId,
java.lang.String recipient, com.novell.soa.af.impl.soap.DataItemArray
items, java.lang.String proxyUser)
```

#### Parameters

Parameter	Description
processId	The Id of the provisioning request.
recipient	The recipient of the provisioning request.
Items	The data items for the provisioning request.
proxyUser	The DN of the proxy user.

#### Example

```

ProvisioningRequestArray requestArray =
stub.getAllProvisioningRequests(recipient);
//

```

```

// If there are some then,
if(requestArray != null)
{
    String Id = " ";
    String requestId = " ";
    String requestNameToStart = "Enable Active Directory Account
(Mgr Approve-No Timeout)";
    //
    // Loop thru and find the request that we want to start
    ProvisioningRequest [] requests =
requestArray.getProvisioningrequest();
    for(int index = 0; index < requests.length; index++)
    {
        //
        // Is this the name of the request to start?
        if(requests[index].getName().compareTo(requestNameToStart)
== 0)
        {
            //
            // Get the current associated data items. Replicate a
new
            // dataitem array excluding the null values.
            Id = requests[index].getId();
            DataItem [] dataItem =
requests[index].getItems().getDataitem();
            if(dataItem != null)
            {
                // Call method replicateDataItemArray on the
                // provUtils utility object, which refers to a
                // utility class that does not ship with the
                // Identity Manager User Application.
                DataItemArray newDataItemArray =
provUtils.replicateDataItemArray(dataItem);
                //
                // Start the Provisioning request for the recipient
                logStep("Calling stub.startAsProxy(" + Id + "," +
recipient + ",newDataItemArray," + proxyUser + ")");
                requestId = stub.startAsProxy(Id, recipient,
newDataItemArray, proxyUser);
            }
        }
    }
}

```

## getProvisioningStatuses

Used to get the status of provisioning requests.

### Method Signature

```

com.novell.soa.af.impl.soap.ProvisioningStatusArray
getProvisioningStatuses(com.novell.soa.af.impl.soap.T_ProvisioningStat
usQuery query, int maxRecords)

```

## Parameters

Parameter	Description
query	<p>Used to specify the provisioning status query. The query has the following components:</p> <ul style="list-style-type: none"><li>♦ <code>choice</code> - the parameters used to filter the results. You can specify multiple parameters. The possible parameters are:  Recipient - a DN RequestID ActivityID Status (an integer) State (an integer) ProvisioningTime (YYYY/MM/DD) ResultTime (YYYY/MM/DD)</li><li>♦ <code>logic</code> - AND or OR</li><li>♦ <code>order</code> - the order in which to sort the results. Possible values for <code>order</code> are:  ACTIVITY_ID RECIPIENT PROVISIONING_TIME RESULT_TIME STATE STATUS REQUEST_ID MESSAGE</li></ul>
maxRecords	Used to specify maximum number of records to retrieve. A value of -1 returns unlimited records.

### Example

```
//  
// Initialize and start a provisioning request  
HashMap provMap = new HashMap();  
provMap.put(Helper.RECIPIENT, recipient);  
provMap.put("Provisioning_Request_To_Start_Key", "Enable Active  
Directory Account (Mgr Approve-No Timeout)");  
//  
// Start request  
// Calls method startProvisioningRequest on the provUtils  
// utility object which refers to a utility class that does not  
// ship with the Identity Manager User Application.  
String requestId = provUtils.startProvisioningRequest(provMap,  
null);  
sleep(5);  
//  
//  
T_ProvisioningStatusQueryChoice [] choice = new  
T_ProvisioningStatusQueryChoice[3];
```

```

    choice[0] = new T_ProvisioningStatusQueryChoice();
    choice[0].setRecipient(recipient);
    choice[1] = new T_ProvisioningStatusQueryChoice();
    choice[1].setRequestId(requestId);
    choice[2] = new T_ProvisioningStatusQueryChoice();
    choice[2].setStatus(new Integer(ProcessConstants.PROCESSING) );
    //
    // Initialize the query
    T_ProvisioningStatusQuery query = new
T_ProvisioningStatusQuery(T_Logic.AND,
T_ProvisioningStatusOrder.STATUS, choice);
    //
    // Make the query
    StringBuffer sb = new StringBuffer();
    int maxRecords = -1;

    ProvisioningStatusArray provStatusArray =
stub.getProvisioningStatuses(query, maxRecords);

```

### startWithDigitalSignature

Used to start a workflow and specify that a digital signature is required.

#### Method Signature

```

java.lang.String startWithDigitalSignature(java.lang.String processId,
java.lang.String recipient, com.novell.soa.af.impl.soap.DataItemArray
items, java.lang.String digitalSignature,
com.novell.soa.af.impl.soap.SignaturePropertyArray
digitalSignaturePropertyArray)

```

#### Parameters

Parameter	Description
processId	The request identifier.
recipient	The request recipient.
items	The data items for the provisioning request.
digital signature	The digital signature.
digitalSignaturePropertyArray.	The digital signature property map.

#### Example

```

    String recipient =
ServiceUtils.getInstance().getLoginData().getUsername(LoginData.RECIPI
ENT_TYPE);
    //
    // Get the digital signature string for admin
    String digitalSignature =
DigitalSignatureUtils.getDigitalSignatureFromFile(IDigitalSignatureCon
stants.ADMIN_DIGITAL_SIGNATURE_FILENAME);

```

```

    ProvisioningRequestArray requestArray =
stub.getAllProvisioningRequests(recipient);
    //
    // If there are some then,

    if(requestArray != null)
    {
        String Id = " ";
        String requestId = " ";
        String requestNameToStart = "Enable Active Directory Account
(Mgr Approve-No Timeout)";
        //
        // Loop thru and find the request that we want to start
        ProvisioningRequest [] requests =
requestArray.getProvisioningrequest();
        for(int index = 0; index < requests.length; index++)
        {
            //
            // Is this the name of the request to start?
            if(requests[index].getName().compareTo(requestNameToStart)
== 0)
                {
                    //
                    // Get the current associated data items. Replicate a
new
                    // dataitem array excluding the null values.
                    Id = requests[index].getId();
                    DataItem [] dataItem =
requests[index].getItems().getDataitem();
                    if(dataItem != null)
                    {
                        // Call method replicateDataItemArray on the
                        // provUtils utility object, which refers to a
                        // utility class that does not ship with the
                        // Identity Manager User Application.
                        DataItemArray newDataItemArray =
provUtils.replicateDataItemArray(dataItem);
                        //
                        // Start a digitally signed provisioning resource
for the recipient
                        requestId =
stub.startWithDigitalSignature(request.getId(), recipient,
newDataItemArray, digitalSignature, null); // Don't get any property
values (optional)
                    }
                }
        }
    }
}

```

### **startAsProxyWithDigitalSignature**

Used to start a workflow using a proxy for the initiator, and specify that a digital signature is required.

## Method Signature

```
java.lang.String startAsProxyWithDigitalSignature(java.lang.String
processId, java.lang.String recipient,
com.novell.soa.af.impl.soap.DataItemArray items, java.lang.String
digitalSignature, com.novell.soa.af.impl.soap.SignaturePropertyArray
digitalSignaturePropertyArray, java.lang.String proxyUser)
```

## Parameters

Parameter	Description
processId	The request identifier.
recipient	The request recipient.
items	The data items for the provisioning request.
digital signature	The digital signature.
digitalSignaturePropertyArray.	The digital signature property map.
proxyUser	The DN of the proxy user.

## Example

```
//
// Get the digital signature string for admin
String digitalSignature =
DigitalSignatureUtils.getDigitalSignatureFromFile(IDigitalSignatureCon
stants.ADMIN_DIGITAL_SIGNATURE_FILENAME);

ProvisioningRequestArray requestArray =
stub.getAllProvisioningRequests(recipient);
//
// If there are some then,
if(requestArray != null)
{
    String Id = " ";
    String requestId = " ";
    String requestNameToStart = "Enable Active Directory Account
(Mgr Approve-No Timeout)";
    //
    // Loop thru and find the request that we want to start
    ProvisioningRequest [] requests =
requestArray.getProvisioningrequest();
    for(int index = 0; index < requests.length; index++)
    {
        //
        // Is this the name of the request to start?
        if(requests[index].getName().compareTo(requestNameToStart)
== 0)
        {
            //
            // Get the current associated data items. Replicate a
```



```

new
    // dataitem array excluding the null values.
    Id = requests[index].getId();
    DataItem [] dataItem =
requests[index].getItems().getDataitem();
    if(dataItem != null)
    {
        // Call method replicateDataItemArray on the
        // provUtils utility object, which refers to a
        // utility class that does not ship with the
        // Identity Manager User Application.
        DataItemArray newDataItemArray =
provUtils.replicateDataItemArray(dataItem);
        //
        // Start a digitally signed provisioning resource
as proxy for the recipient

        requestId =
stub.startAsProxyWithDigitalSignature(request.getId(), recipient,
newDataItemArray, digitalSignature, null, proxyUser);
    }
}
}
}
}

```

## startWithCorrelationId

Used to start a workflow with a correlation ID. The correlation ID provides a way to track a set of related workflow processes. When started with this method, workflow processes can be queried and sorted by correlation ID.

### Method Signature

```

java.lang.String startWithCorrelationId(java.lang.String processId,
java.lang.String recipient, com.novell.soa.af.impl.soap.DataItemArray
items, java.lang.String signature,
com.novell.soa.af.impl.soap.SignaturePropertyArray props,
java.lang.String proxyUser, java.lang.String correlationId)
    throws com.novell.soa.af.impl.soap.AdminException,
java.rmi.RemoteException;

```

### Parameters

Parameter	Description
processId	The request identifier.
recipient	The request recipient.
items	The data items for the provisioning request.
digital signature	The digital signature.
digitalSignaturePropertyArray	The digital signature property map.

Parameter	Description
proxyUser	The DN of the proxy user.
correlationID	The string that identifies the correlation ID. The correlation ID cannot be longer than 32 characters.

### 20.3.3 Work Entries

This section provides reference information for each Work Entries method. The Work Entries methods include:

- ◆ [“forward” on page 414](#)
- ◆ [“reassignWorkTask” on page 416](#)
- ◆ [“getWork” on page 417](#)
- ◆ [“forwardWithDigitalSignature” on page 418](#)
- ◆ [“forwardAsProxy” on page 421](#)
- ◆ [“unclaim” on page 423](#)
- ◆ [“forwardAsProxyWithDigitalSignature” on page 424](#)
- ◆ [“reassign” on page 426](#)
- ◆ [“getWorkEntries” on page 427](#)
- ◆ [“getQuorumForWorkTask” on page 429](#)
- ◆ [“resetPriorityForWorkTask” on page 430](#)

#### forward

Used to forward a task to the next activity in the workflow with the appropriate action (approve, deny, refuse).

#### Method Signature

```
void forward(java.lang.String wid,
com.novell.soa.af.impl.soap.T_Action action,
com.novell.soa.af.impl.soap.DataItemArray items, java.lang.String
comment)
```

#### Parameters

Parameter	Description
wid	The work Id.
action	The action to take (approve, deny, refuse).
items	The data items required by the workflow.
comment	The comment.

## Example

```
//
// Initialize and start a provisioning request
HashMap provMap = new HashMap();
provMap.put(Helper.RECIPIENT, recipient);
provMap.put("Provisioning_Request_To_Start_Key", "Enable Active
Directory Account (Mgr Approve-No Timeout)");
//
// Start request
// Calls method startProvisioningRequest on the provUtils
// utility object which refers to a utility class that does not
// ship with the Identity Manager User Application.
String requestId = provUtils.startProvisioningRequest(provMap,
null);
sleep(5);
//
// Get the process id for this running process
Process process = stub.getProcess(requestId);
String processId = null;
if(process != null)
    processId = process.getProcessId();

T_Action action = T_Action.APPROVE;

T_Logic logic = T_Logic.AND;

T_WorkEntryOrder workEntryOrder = T_WorkEntryOrder.REQUEST_ID;

T_WorkEntryQueryChoice [] workEntryqueryChoice = new
T_WorkEntryQueryChoice[3];
workEntryqueryChoice[0] = new T_WorkEntryQueryChoice();
workEntryqueryChoice[0].setRecipient(recipient);
workEntryqueryChoice[1] = new T_WorkEntryQueryChoice();
workEntryqueryChoice[1].setRequestId(requestId);
workEntryqueryChoice[2] = new T_WorkEntryQueryChoice();
workEntryqueryChoice[2].setProcessId(processId);
//
// Create work entry query
T_WorkEntryQuery query = new T_WorkEntryQuery(logic,
_workEntryOrder, workEntryqueryChoice);
//
// Get all work entries (max records)
WorkEntryArray workEntryArray = stub.getWorkEntries(query, -1);

WorkEntry [] workEntry = workEntryArray.getWorkentry();

if(workEntry != null
{
    for(int wIndex = 0; wIndex < workEntry.length; wIndex++)
    {
        String workId = workEntry[wIndex].getId();
        //
    }
}
```

```

//
LoggerUtils.sendToLogAndConsole("Forwarding : " +
workEntry[wIndex].getActivityName() + " work id: " + workId);
//
// Get the dataitem for this item of work
DataItemArray dataItemArray = stub.getWork(workId);
DataItem [] dataItem = dataItemArray.getDataitem();
DataItemArray newDataItemArray = null;
if(dataItem != null)
    // Call method replicateDataItemArray on the
    // provUtils utility object, which refers to a
    // utility class that does not ship with the
    // Identity Manager User Application.
    newDataItemArray =
provUtils.replicateDataItemArray(dataItem);
else
    throw new TestProgramException("DataItem is null.");
//
// Claim request for recipient
String comment = _action.toString() + " this request: " +
requestId + " for " + recipient;
    stub.forward(workId, _action, newDataItemArray, comment);
}
}

```

## reassignWorkTask

Used to reassign a task from one user to another.

### Method Signature

```
void reassignWorkTask(java.lang.String wid, java.lang.String
addressee, java.lang.String comment)
```

### Parameters

Parameter	Description
wid	The Id of the task.
addressee	The addressee of the task.
comment	A comment about the task.

### Example

```

//
// Initialize and start a provisioning request
HashMap provMap = new HashMap();
provMap.put(Helper.RECIPIENT, recipient);
provMap.put(I"Provisioning_Request_To_Start_Key", "Enable
Active Directory Account (Mgr Approve-No Timeout)");
//
// Start request

```

```

    // Calls method startProvisioningRequest on the provUtils
    // utility object which refers to a utility class that does not
    // ship with the Identity Manager User Application.
    String requestId = provUtils.startProvisioningRequest(provMap,
null);
    sleep(5);
    //
    // Get the process id for this running process
    Process process = stub.getProcess(requestId);
    if(process != null)
    {
        String processId = process.getProcessId();
        String initiator = process.getInitiator();
        //
        // Setup for the query
        HashMap map = new HashMap();
        map.put(Helper.REQUESTID, requestId);
        map.put(Helper.RECIPIENT, recipient);
        map.put(Helper.PROCESSID, processId);
        map.put(Helper.INITIATOR, initiator);
        WorkEntry [] workEntry =
workEntryUtils.getWorkEntriesUsingQuery(map,
T_WorkEntryOrder.REQUEST_ID, T_Logic.AND);

        if(workEntry == null)
            throw new TestProgramException("Work list is empty.");
        //
        // Reassign the work entry from recipient to the addressee
        //
        // Should only be one item
        String reassignComment = null;
        String workId = workEntry[0].getId();
        if(workId != null)
        {
            //
            // Reassign work entry(s) to addressee
            reassignComment = "Reassigning work entry " + workId +
" from " + recipient + " to " + addressee;
            stub.reassign(workId, addressee, reassignComment);
            LoggerUtils.sendToLogAndConsole("Reassign work entry "
+ workId + " from " + recipient + " to " + addressee);
        }
    }
}

```

## getWork

Used to retrieve data items for a work entry identified by the Id (UUID) of a task.

### Method Signature

```
com.novell.soa.af.impl.soap.DataItemArray getWork(java.lang.String
workId)
```

## Example

```
//
// Initialize and start a provisioning request
HashMap provMap = new HashMap();
provMap.put(Helper.RECIPIENT, recipient);
provMap.put("Provisioning_Request_To_Start_Key", "Enable
Active Directory Account (Mgr Approve-No Timeout)");
//
// Start request
// Calls method startProvisioningRequest on the provUtils
// utility object which refers to a utility class that does not
// ship with the Identity Manager User Application.
String requestId = provUtils.startProvisioningRequest(provMap,
null);
sleep(5);
//
// Get the process id for this running process
Process process = stub.getProcess(requestId);
if(process != null)
{
    String processId = process.getProcessId();
    String initiator = process.getInitiator();
    //
    // Setup for the query
    HashMap map = new HashMap();
    map.put(Helper.REQUESTID, requestId);
    map.put(Helper.RECIPIENT, recipient);
    map.put(Helper.PROCESSID, processId);
    map.put(Helper.INITIATOR, initiator);
    WorkEntry [] workEntry =
workEntryUtils.getWorkEntriesUsingQuery(map,
T_WorkEntryOrder.REQUEST_ID, T_Logic.AND);
    //
    // Do assertion here
    Assert.assertNotNull("WorkEntry is null for recipient : " +
recipient + " with request id : " + requestId, workEntry);
    DataItemArray dataItemArray =
stub.getWork(workEntry[0].getId() );
    DataItem [] dataItem = dataItemArray.getDataitem();
    if(dataItem != null)
        LoggerUtils.sendToLogAndConsole(dataItem[0].getName());
}
}
```

## forwardWithDigitalSignature

Used to forward a provisioning request with a digital signature and optional digital signature properties. For example, this can be used by an administrator to force a user-facing activity to be approved, denied or refused.

### Method Signature

```
void forwardWithDigitalSignature(java.lang.String wid,
com.novell.soa.af.impl.soap.T_Action action,
com.novell.soa.af.impl.soap.DataItemArray items, java.lang.String
```

```
comment, java.lang.String digitalSignature,  
com.novell.soa.af.impl.soap.SignaturePropertyArray  
digitalSignaturePropertyArray)
```

## Parameters

Parameter	Description
wid	The workId.
action	The action to take (approve, deny, refuse).
items	The data items required by the workflow.
comment	A comment about the action.
digitalSignature	The digital signature.
digitalSignaturePropertyArray	The digital signature property map.

## Example

```
//  
// Initialize and start a provisioning request  
HashMap provMap = new HashMap();  
provMap.put(Helper.RECIPIENT, recipient);  
provMap.put("Provisioning_Request_To_Start_Key", "Enable Active  
Directory Account (Mgr Approve-No Timeout)");  
//  
// Start request  
// Calls method startProvisioningRequest on the provUtils  
// utility object which refers to a utility class that does not  
// ship with the Identity Manager User Application.  
String requestId = provUtils.startProvisioningRequest(provMap,  
null);  
sleep(5);  
//  
// Get the process id for this running process  
Process process = stub.getProcess(requestId);  
String processId = null;  
if(process != null)  
    processId = process.getProcessId();  
  
T_Action action = T_Action.APPROVE;  
  
T_Logic logic = T_Logic.AND;  
  
T_WorkEntryOrder workEntryOrder = T_WorkEntryOrder.REQUEST_ID;  
  
// Get the digital signature string for admin  
String digitalSignature =  
DigitalSignatureUtils.getDigitalSignatureFromFile(IDigitalSignatureCon  
stants.ADMIN_DIGITAL_SIGNATURE_FILENAME);
```

```

    T_WorkEntryQueryChoice [] workEntryqueryChoice = new
T_WorkEntryQueryChoice[3];
    workEntryqueryChoice[0] = new T_WorkEntryQueryChoice();
    workEntryqueryChoice[0].setRecipient(recipient);
    workEntryqueryChoice[1] = new T_WorkEntryQueryChoice();
    workEntryqueryChoice[1].setRequestId(requestId);
    workEntryqueryChoice[2] = new T_WorkEntryQueryChoice();
    workEntryqueryChoice[2].setProcessId(processId);
    //
    // Create work entry query
    T_WorkEntryQuery query = new T_WorkEntryQuery(logic,
_workEntryOrder, workEntryqueryChoice);
    //
    // Get all work entries (max records)
    WorkEntryArray workEntryArray = stub.getWorkEntries(query, -1);

    WorkEntry [] workEntry = workEntryArray.getWorkentry();

    if(workEntry != null

    {
        for(int wIndex = 0; wIndex < workEntry.length; wIndex++)
        {
            String workId = workEntry[wIndex].getId();
            //
            //
            LoggerUtils.sendToLogAndConsole("Forwarding : " +
workEntry[wIndex].getActivityName() + " work id: " + workId);
            //
            // Get the dataitem for this item of work
            DataItemArray dataItemArray = stub.getWork(workId);
            DataItem [] dataItem = dataItemArray.getDataitem();
            DataItemArray newDataItemArray = null;
            if(dataItem != null)
                // Call method replicateDataItemArray on the
                // provUtils utility object, which refers to a
                // utility class that does not ship with the
                // Identity Manager User Application.
                newDataItemArray =
provUtils.replicateDataItemArray(dataItem);
            else
                throw new TestProgramException("DataItem is null.");
            //
            // Claim request for recipient
            String comment = _action.toString() + " this request: " +
requestId + " for " + recipient;
            stub.forwardWithDigitalSignature(workId, _action,
newDataItemArray, comment, digitalSignature, null);
        }
    }
}

```



## forwardAsProxy

Used to forward a provisioning request. For example, this can be used by an administrator to force a user-facing activity to be approved, denied or refused.

### Method Signature

```
void forwardAsProxy(java.lang.String wid,  
com.novell.soa.af.impl.soap.T_Action action,  
com.novell.soa.af.impl.soap.DataItemArray items, java.lang.String  
comment, java.lang.String proxyUser)
```

### Parameters

Parameter	Description
wid	The workId (activity Id).
action	The action to take (approve, deny, refuse).
items	The data items required by the workflow.
comment	The comment to add to the activity.
proxyUser	The DN of the proxy user.

### Example

```
//  
// Initialize and start a provisioning request  
HashMap provMap = new HashMap();  
provMap.put(Helper.RECIPIENT, recipient);  
provMap.put("Provisioning_Request_To_Start_Key", "Enable Active  
Directory Account (Mgr Approve-No Timeout)");  
//  
// Start request  
// Calls method startProvisioningRequest on the provUtils  
// utility object which refers to a utility class that does not  
// ship with the Identity Manager User Application.  
String requestId = provUtils.startProvisioningRequest(provMap,  
null);  
sleep(5);  
//  
// Get the process id for this running process  
Process process = stub.getProcess(requestId);  
String processId = null;  
if(process != null)  
    processId = process.getProcessId();  
  
T_Action action = T_Action.APPROVE;  
  
T_Logic logic = T_Logic.AND;  
  
T_WorkEntryOrder workEntryOrder = T_WorkEntryOrder.REQUEST_ID;
```

```

    T_WorkEntryQueryChoice [] workEntryqueryChoice = new
T_WorkEntryQueryChoice[3];
    workEntryqueryChoice[0] = new T_WorkEntryQueryChoice();
    workEntryqueryChoice[0].setRecipient(recipient);
    workEntryqueryChoice[1] = new T_WorkEntryQueryChoice();
    workEntryqueryChoice[1].setRequestId(requestId);
    workEntryqueryChoice[2] = new T_WorkEntryQueryChoice();
    workEntryqueryChoice[2].setProcessId(processId);
    //
    // Create work entry query
    T_WorkEntryQuery query = new T_WorkEntryQuery(logic,
_workEntryOrder, workEntryqueryChoice);
    //
    // Get all work entries (max records)
    WorkEntryArray workEntryArray = stub.getWorkEntries(query, -1);

    WorkEntry [] workEntry = workEntryArray.getWorkentry();

    if(workEntry != null

    {
        for(int wIndex = 0; wIndex < workEntry.length; wIndex++)
        {
            String workId = workEntry[wIndex].getId();
            //
            //
            LoggerUtils.sendToLogAndConsole("Forwarding : " +
workEntry[wIndex].getActivityName() + " work id: " + workId);
            //
            // Get the dataitem for this item of work
            DataItemArray dataItemArray = stub.getWork(workId);
            DataItem [] dataItem = dataItemArray.getDataitem();
            DataItemArray newDataItemArray = null;
            if(dataItem != null)
                // Call method replicateDataItemArray on the
                // provUtils utility object, which refers to a
                // utility class that does not ship with the
                // Identity Manager User Application.
                newDataItemArray =
provUtils.replicateDataItemArray(dataItem);
            else
                throw new TestProgramException("DataItem is null.");
            //
            // Claim request for recipient
            String comment = _action.toString() + " this request: " +
requestId + " for " + recipient;
            String proxyUser =
ServiceUtils.getInstance().getLoginData().getUsername(LoginData.PROXY_
TYPE);
            stub.forwardAsProxy(workId, _action, newDataItemArray,
comment, proxyUser);
        }
    }

```

## unclaim

Used to unclaim a provisioning request. This method only works if the request was claimed in the User Application. You cannot unclaim a request once it has been forwarded using the SOAP interface, because the `forward` API method (see “[forward](#)” on page 414) claims and forwards in one operation.

### Method Signature

```
void unclaim(java.lang.String wid, java.lang.String comment)
```

### Parameters

Parameter	Description
<code>workId</code>	The Id of the activity to unclaim.
<code>comment</code>	A comment about the action.

### Example

```
// Action and Approval Types
final int SELECTED_ACTION = 0; final int CLAIMED_SELECTED_ACTION =
0;
T_Action [] action = {T_Action.APPROVE, T_Action.REFUSE,
T_Action.DENY};
T_ApprovalStatus [] claimedAction = {T_ApprovalStatus.Approved,
T_ApprovalStatus.Retraacted, T_ApprovalStatus.Denied};
//
// Get the process id for this running process
Process process = stub.getProcess(requestId);
String processId = null;
if(process != null)
    processId = process.getProcessId();

HashMap map = new HashMap();
map.put(Helper.REQUESTID, requestId);
map.put(Helper.RECIPIENT, recipient);
map.put(Helper.PROCESSID, processId);
//
// Claim the request
WorkEntry workEntry = workEntryUtils.claimWorkEntry(map,
action[SELECTED_ACTION]);
if(workEntry != null)
{
    //
    // Now unclaim the entry
    String workId = workEntry.getId();
    stub.unclaim(workId, "Unclaiming this work item : " + workId +
" for request id : " + requestId);
}
```

## forwardAsProxyWithDigitalSignature

Used to forward a provisioning request with a digital signature and digital signature properties. For example, this can be used by an administrator to force a user-facing activity to be approved, denied or refused.

### Method Signature

```
void forwardAsProxyWithDigitalSignature(java.lang.String wid,  
com.novell.soa.af.impl.soap.T_Action action,  
com.novell.soa.af.impl.soap.DataItemArray items, java.lang.String  
comment, java.lang.String digitalSignature,  
com.novell.soa.af.impl.soap.SignaturePropertyArray  
digitalSignaturePropertyArray, java.lang.String proxyUser)
```

### Parameters

Parameter	Description
wid	The world (activity Id).
action	The action to take (approve, deny, refuse).
items	The data items required by the workflow.
comment	The comment to add to the activity.
digitalSignature	The digital signature.
digitalSignaturePropertyArray	The digital signature property map.
proxyUser	The DN of the proxy user.

### Example

```
//  
// Initialize and start a provisioning request  
HashMap provMap = new HashMap();  
provMap.put(Helper.RECIPIENT, recipient);  
provMap.put("Provisioning_Request_To_Start_Key", "Enable Active  
Directory Account (Mgr Approve-No Timeout)");  
//  
// Start request  
// Calls method startProvisioningRequest on the provUtils  
// utility object which refers to a utility class that does not  
// ship with the Identity Manager User Application.  
String requestId = provUtils.startProvisioningRequest(provMap,  
null);  
sleep(5);  
//  
// Get the process id for this running process  
Process process = stub.getProcess(requestId);  
String processId = null;  
if(process != null)  
    processId = process.getProcessId();
```

```

T_Action action = T_Action.APPROVE;

T_Logic logic = T_Logic.AND;

T_WorkEntryOrder workEntryOrder = T_WorkEntryOrder.REQUEST_ID;

T_WorkEntryQueryChoice [] workEntryqueryChoice = new
T_WorkEntryQueryChoice[3];
workEntryqueryChoice[0] = new T_WorkEntryQueryChoice();
workEntryqueryChoice[0].setRecipient(recipient);
workEntryqueryChoice[1] = new T_WorkEntryQueryChoice();
workEntryqueryChoice[1].setRequestId(requestId);
workEntryqueryChoice[2] = new T_WorkEntryQueryChoice();
workEntryqueryChoice[2].setProcessId(processId);
//
// Create work entry query
T_WorkEntryQuery query = new T_WorkEntryQuery(logic,
_workEntryOrder, workEntryqueryChoice);
//
// Get all work entries (max records)
WorkEntryArray workEntryArray = stub.getWorkEntries(query, -1);

WorkEntry [] workEntry = workEntryArray.getWorkentry();

if(workEntry != null

{
    for(int wIndex = 0; wIndex < workEntry.length; wIndex++)
    {
        String workId = workEntry[wIndex].getId();
        //
        //
        LoggerUtils.sendToLogAndConsole("Forwarding : " +
workEntry[wIndex].getActivityName() + " work id: " + workId);
        //
        // Get the dataitem for this item of work
        DataItemArray dataItemArray = stub.getWork(workId);
        DataItem [] dataItem = dataItemArray.getDataitem();
        DataItemArray newDataItemArray = null;
        if(dataItem != null)
            // Call method replicateDataItemArray on the
            // provUtils utility object, which refers to a
            // utility class that does not ship with the
            // Identity Manager User Application.
            newDataItemArray =
provUtils.replicateDataItemArray(dataItem);
        else
            throw new TestProgramException("DataItem is null.");
        //
        // Claim request for recipient
        String comment = _action.toString() + " this request: " +
requestId + " for " + recipient;
        String digitalSignature =

```

```

DigitalSignatureUtils.getDigitalSignatureFromFile(IDigitalSignatureCon
stants.MMACKENZIE_DIGITAL_SIGNATURE_FILENAME);
    String proxyUser =
ServiceUtils.getInstance().getLoginData().getUsername(LoginData.PROXY_
TYPE);

        stub.forwardAsProxyWithDigitalSignature(workId, _action,
newDataItemArray, comment, digitalSignature, null, proxyUser);
    }

}

```

## reassign

Used to reassign a task from one user to another.

### Method Signature

```

void reassign(java.lang.String wid, java.lang.String addressee,
java.lang.String comment)

```

### Parameters

Parameter	Description
wid	The Id of the activity to be reassigned.
addressee	The addressee of the activity.
comment	A comment about the action.

### Example

```

//
// Initialize and start a provisioning request
HashMap provMap = new HashMap();
provMap.put(Helper.RECIPIENT, recipient);
provMap.put("Provisioning_Request_To_Start_Key", "Enable
Active Directory Account (Mgr Approve-No Timeout)");
//
// Start request
// Calls method startProvisioningRequest on the provUtils
// utility object which refers to a utility class that does not
// ship with the Identity Manager User Application.
String requestId = provUtils.startProvisioningRequest(provMap,
null);
sleep(5);
//
// Get the process id for this running process
Process process = stub.getProcess(requestId);
if(process != null)
{
    String processId = process.getProcessId();
    String initiator = process.getInitiator();
    //

```

```

// Setup for the query
HashMap map = new HashMap();
map.put(Helper.REQUESTID, requestId);
map.put(Helper.RECIPIENT, recipient);
map.put(Helper.PROCESSID, processId);
map.put(Helper.INITIATOR, initiator);
WorkEntry [] workEntry =
workEntryUtils.getWorkEntriesUsingQuery(map,
T_WorkEntryOrder.REQUEST_ID, T_Logic.AND);

if(workEntry == null)
    throw new TestProgramException("Work list is empty.");
//
// Reassign the work entry from recipient to the addressee
//
// Should only be one work item
String reassignComment = null;
String workId = workEntry[0].getId();
if(workId != null)
{
    //
    // Reassign work entry(s) to addressee
    reassignComment = "Reassigning work entry " + workId +
" from " + recipient + " to " + addressee;
    stub.reassign(workId, addressee, reassignComment);
    LoggerUtils.sendToLogAndConsole("Reassign work entry "
+ workId + " from " + recipient + " to " + addressee);
}
}

```

## getWorkEntries

Used to query the work entries (activities) and returns a list of `WorkEntry` objects that satisfy the query.

### Method Signature

```

com.novell.soa.af.impl.soap.WorkEntryArray
getWorkEntries(com.novell.soa.af.impl.soap.T_WorkEntryQuery query, int
maxRecords)

```

## Parameters

Parameter	Description
query	<p>Used to specify the query used to retrieve the list of activities. The query has the following components:</p> <ul style="list-style-type: none"><li>◆ <i>choice</i> - the parameters used to filter the results. You can specify multiple parameters. The possible parameters are:  Adresse - a DN ProcessId RequestId ActivityId Status (an integer) Owner Priority CreationTime (YYYY/MM/DD) ExpTime (YYYY/MM/DD) CompletionTime (YYYY/MM/DD) Recipient Initiator ProxyFor</li><li>◆ <i>logic</i> - AND or OR</li><li>◆ <i>order</i> - the order in which to sort the results. Possible values for <i>order</i> are:  ACTIVITY_ID RECIPIENT PROVISIONING_TIME RESULT_TIME STATE STATUS REQUEST_ID MESSAGE</li></ul>
maxRecords	Used to specify maximum number of records to retrieve. A value of -1 returns unlimited records.

### Example

```
T_Action action = T_Action.APPROVE;

T_Logic logic = T_Logic.AND;

T_WorkEntryOrder workEntryOrder = T_WorkEntryOrder.REQUEST_ID;

T_WorkEntryQueryChoice [] workEntryqueryChoice = new
T_WorkEntryQueryChoice[3];
workEntryqueryChoice[0] = new T_WorkEntryQueryChoice();
workEntryqueryChoice[0].setRecipient(recipient);
workEntryqueryChoice[1] = new T_WorkEntryQueryChoice();
```



```

workEntryqueryChoice[1].setRequestId(requestId);
workEntryqueryChoice[2] = new T_WorkEntryQueryChoice();
workEntryqueryChoice[2].setProcessId(processId);
//
// Create work entry query
T_WorkEntryQuery query = new T_WorkEntryQuery(logic,
_workEntryOrder, workEntryqueryChoice);
//
// Get all work entries (max records)
WorkEntryArray workEntryArray = stub.getWorkEntries(query, -1);

WorkEntry [] workEntry = workEntryArray.getWorkentry();

```

## getQuorumForWorkTask

Used to get information about the quorum for a workflow activity. A quorum must have actually been specified for the workflow activity by the workflow designer for this method to work.

### Method Signature

```

com.novell.soa.af.impl.soap.Quorum
getQuorumForWorkTask((java.lang.String workId)

```

### Example

```

//

// Note: Provisioning resource must contain a quorum in the flow
for this api method to work

//
// Action and Approval Types
final int SELECTED_ACTION = 0; final int CLAIMED_SELECTED_ACTION =
0;
T_Action [] action = {T_Action.APPROVE, T_Action.REFUSE,
T_Action.DENY};
T_ApprovalStatus [] claimedAction = {T_ApprovalStatus.Approved,
T_ApprovalStatus.Retracted, T_ApprovalStatus.Denied};
//
// Get the process id for this running process
Process process = stub.getProcess(requestId);
String processId = null;
if(process != null)
    processId = process.getProcessId();
//
// Setup for the query
HashMap map = new HashMap();
map.put(Helper.REQUESTID, requestId);
map.put(Helper.RECIPIENT, recipient);
map.put(Helper.PROCESSID, processId);
map.put(Helper.INITIATOR, process.getInitiator() );
WorkEntry [] workEntry =
workEntryUtils.getWorkEntriesUsingQuery(map,
T_WorkEntryOrder.REQUEST_ID, T_Logic.AND);

```

```

    Assert.assertNotNull("WorkEntry is null for recipient : " +
recipient + " with request id : " + requestId, workEntry);
    //
    //
    String workId = workEntry[0].getId();

    Quorum quorum = stub.getQuorumForWorkTask(workId);

    Assert.assertNotNull("Quorum for work task is null for recipient :
" + recipient + " with request id : " + requestId, quorum);
    //

    // Extract some data
    int approvalCondition = quorum.getApprovalCondition();
    int status = quorum.getStatus();
    int approveCount = quorum.getApproveCount();
    int participantCount = quorum.getParticipantCount();
    int refuseCount = quorum.getRefuseCount();

```

### **resetPriorityForWorkTask**

Used to reset the priority for a task. You should only use this method on provisioning requests that have a single approval branch.

#### Method Signature

```
void resetPriorityForWorkTask(java.lang.String workId, int priority,
java.lang.String comment)
```

#### Parameters

Parameter	Description
workId	The Id of the activity.
priority	The priority to set for the activity.
comment	A comment about the action.

#### Example

```

// Calls method getProvisioningResourceNameForRecipient
// on the provUtils utility object, which refers to a utility class
// that does not ship with the Identity Manager User Application.
String requestNameToStart =
provUtils.getProvisioningResourceNameForRecipient(recipient, "Enable
Active Directory Account");
    Map map = MapUtils.createAndSetMap(new Object[] {
        Helper.RECIPIENT, recipient,
        IProvisioningConstants.PROVISIONING_REQUEST_TO_START,
requestNameToStart});
    //
    // Try and start the provisioning request
    String requestId =

```

```

provWrapper.startProvisioningRequest(recipient, requestNameToStart);
    RationalTestScript.sleep(5);
    //
    // Get the process id for this running process
    Process process = stub.getProcess(requestId);
    if(process != null)
    {
        //
        // Setup for the query
        HashMap map = new HashMap();
        map.put(Helper.REQUESTID, requestId);
        map.put(Helper.RECIPIENT, recipient);
        map.put(Helper.PROCESSID, process.getProcessId());
        map.put(Helper.INITIATOR, process.getInitiator());
        WorkEntry [] workEntry =
workEntryUtils.getWorkEntriesUsingQuery(map,
T_WorkEntryOrder.REQUEST_ID, T_Logic.AND);
        //
        // Now reset the priority for this work item.
        String workId = workEntry[0].getId();
        String comment = "Resetting priority for this work item.";
        int priority = 0;
        stub.resetPriorityForWorkTask(workId, priority, comment);
    }
}

```

## 20.3.4 Comments

This section provides reference information for each Comments method. The Comments methods include:

- ◆ [“getCommentsByType” on page 431](#)
- ◆ [“getCommentsByActivity” on page 433](#)
- ◆ [“getCommentsByUser” on page 434](#)
- ◆ [“getCommentsByCreationTime” on page 434](#)
- ◆ [“addComment” on page 436](#)
- ◆ [“getComments” on page 436](#)

### getCommentsByType

Used to get workflow comments that are of a specific type (for example, user, system).

#### Method Signature

```

com.novell.soa.af.impl.soap.CommentArray
getCommentsByType(java.lang.String requestId,
com.novell.soa.af.impl.soap.T_CommentType type)

```

## Parameters

Parameter	Description
requestId	The process identifier.
type	The comment type (USER or SYSTEM)

## Example

```
//
// Initialize and start a provisioning request
HashMap provMap = new HashMap();
provMap.put(Helper.RECIPIENT, recipient);
provMap.put("Provisioning_Request_To_Start_Key", "Enable
Active Directory Account (Mgr Approve-No Timeout)");
//
// Start request
// Calls method startProvisioningRequest on the provUtils
// utility object which refers to a utility class that does not
// ship with the Identity Manager User Application.
String requestId = provUtils.startProvisioningRequest(provMap,
null);
sleep(5);
//
// Get the comments by type : either User or System
T_CommentType [] commentTypes = {T_CommentType.User,
T_CommentType.System};

for(int types = 0; types < commentTypes.length; types++)
{
    CommentArray commentArray = stub.getCommentsByType(requestId,
commentTypes[types]);
    Comment [] comments = commentArray.getComment();
    if(comments != null)
    {
        for(int index = 0; index < comments.length; index++)
        {
            LoggerUtils.sendToLogAndConsole(" \nComment Type = " +
commentTypes[types].getValue() + "\n" +
                "Activity Id: " +
comments[index].getActivityId() + "\n" +
                "Comment : " + comments[index].getComment()
+ "\n" +
                "User : " + comments[index].getUser() + "\n"
+
                "System comment : " +
comments[index].getSystemComment() + "\n" +
                "Time stamp : " +
comments[index].getTimestamp().getTime().toString() );
        }
    }
}
```

## getCommentsByActivity

Used to get the comments for a specific activity.

### Method Signature

```
com.novell.soa.af.impl.soap.CommentArray  
getCommentsByActivity(java.lang.String requestId, java.lang.String  
aid)
```

### Parameters

Parameter	Description
requestId	The process identifier.
aid	The activity identifier.

### Example

```
//  
// Initialize and start a provisioning request  
HashMap provMap = new HashMap();  
provMap.put(Helper.RECIPIENT, recipient);  
provMap.put("Provisioning_Request_To_Start_Key", "Enable  
Active Directory Account (Mgr Approve-No Timeout)");  
//  
// Start request  
// Calls method startProvisioningRequest on the provUtils  
// utility object which refers to a utility class that does not  
// ship with the Identity Manager User Application.  
String requestId = provUtils.startProvisioningRequest(provMap,  
null);  
sleep(5);  
//  
// Get the process id for this running process  
Process process = stub.getProcess(requestId);  
if(process != null)  
{  
    String processId = process.getProcessId();  
    String initiator = process.getInitiator();  
    //  
    // Setup for the query  
    HashMap map = new HashMap();  
    map.put(Helper.REQUESTID, requestId);  
    map.put(Helper.RECIPIENT, recipient);  
    map.put(Helper.PROCESSID, processId);  
    map.put(Helper.INITIATOR, initiator);  
    WorkEntry [] workEntry =  
workEntryUtils.getWorkEntriesUsingQuery(map,  
T_WorkEntryOrder.REQUEST_ID, T_Logic.AND);  
    //  
    // Get the activity id associated with the item of work  
    String activityId = workEntry[0].getActivityId();  
    //
```

```

        // Get the comments based on activity
        if(activityId != null)
        {
            CommentArray commentArray =
stub.getCommentsByActivity(requestId, activityId);
            Comment [] comments = commentArray.getComment();
        }
    }
}

```

## getCommentsByUser

Used to get the comments made by a specific user.

### Method Signature

```

com.novell.soa.af.impl.soap.CommentArray
getCommentsByUser(java.lang.String requestId, java.lang.String user)

```

### Parameters

Parameter	Description
requestId	The process identifier.
user	The the DN of the user (recipient) who created the comments

### Example

```

    //
    // Initialize and start a provisioning request
    HashMap provMap = new HashMap();
    provMap.put(Helper.RECIPIENT, recipient);
    provMap.put("Provisioning_Request_To_Start_Key", "Enable
Active Directory Account (Mgr Approve-No Timeout)");
    //
    // Start request
    // Calls method startProvisioningRequest on the provUtils
    // utility object which refers to a utility class that does not
    // ship with the Identity Manager User Application.
    String requestId = provUtils.startProvisioningRequest(provMap, \
null);
    sleep(5);
    //
    // Get the comments by recipient (should be the same as user)
    CommentArray commentArray = stub.getCommentsByUser(requestId,
recipient);
    Comment [] comments = commentArray.getComment();

```

## getCommentsByCreationTime

Used to get comments made at a specific time.

## Method Signature

```
com.novell.soa.af.impl.soap.CommentArray  
getCommentsByCreationTime(java.lang.String requestId, long time,  
com.novell.soa.af.impl.soap.T_Operator op)
```

## Parameters

Parameter	Description
requestId	The process identifier.
time	The time stamp.
op	The query operator to use. Possible values for operator are:  EQ - equals LT - less than LE - less than or equal to GT - greater than GE - greater than or equal to

## Example

```
//  
// Initialize and start a provisioning request  
HashMap provMap = new HashMap();  
provMap.put(Helper.RECIPIENT, recipient);  
provMap.put("Provisioning_Request_To_Start_Key", "Enable  
Active Directory Account (Mgr Approve-No Timeout)");  
//  
// Start request  
// Calls method startProvisioningRequest on the provUtils  
// utility object which refers to a utility class that does not  
// ship with the Identity Manager User Application.  
String requestId = provUtils.startProvisioningRequest(provMap,  
null);  
sleep(5);  
//  
// Get comments by creation time for the provisioning request  
started above.  
long currentTime = System.currentTimeMillis();  
LoggerUtils.sendToLogAndConsole("-->Current date = " + new  
java.util.Date(currentTime).toString() );  
//  
//  
T_Operator operator = T_Operator.GT;  
CommentArray commentArray =  
stub.getCommentsByCreationTime(requestId, currentTime, operator);  
Comment [] comments = commentArray.getComment();
```

## addComment

Used to add a comment to a workflow activity.

### Method Signature

```
void addComment(java.lang.String workId, java.lang.String comment)
```

### Parameters

Parameter	Description
workId	The activity identifier (UUID).
comment	A comment about the activity.

### Example

```
//
// Initialize and start a provisioning request
HashMap provMap = new HashMap();
provMap.put(Helper.RECIPIENT, recipient);
provMap.put("Provisioning_Request_To_Start_Key", "Enable
Active Directory Account (Mgr Approve-No Timeout)");
//
// Start request
// Calls method startProvisioningRequest on the provUtils
// utility object which refers to a utility class that does not
// ship with the Identity Manager User Application.
String requestId = provUtils.startProvisioningRequest(provMap,
null);
sleep(5);
//
// Setup for the query
HashMap map = new HashMap();
map.put(Helper.REQUESTID, requestId);
map.put(Helper.RECIPIENT, recipient);
WorkEntry [] workEntry =
workEntryUtils.getWorkEntriesUsingQuery(map,
T_WorkEntryOrder.REQUEST_ID, T_Logic.AND);
//
// Add comment to the work entry
String workId = workEntry[0].getId();
String processId = workEntry[0].getProcessId();
String addComment = "Test comment for work id " + workId;
stub.addComment(workId, addComment);
sleep(2);
```

## getComments

Used to get comments from a workflow.



## Method Signature

```
com.novell.soa.af.impl.soap.CommentArray getComments(java.lang.String  
workId, int maxRecords)
```

## Parameters

Parameter	Description
workId	The activity Id (UUID).
maxRecords	An integer specifying the maximum number of records to retrieve.

## Example

```
//  
// Setup for the query  
HashMap map = new HashMap();  
map.put(Helper.RECIPIENT, addressee);  
WorkEntry [] workEntry =  
workEntryUtils.getWorkEntriesUsingQuery(map,  
T_WorkEntryOrder.ADDRESSEE, T_Logic.OR);  
//  
// Get all the comment records for this workId  
int maxRecords = -1;  
CommentArray commentArray = stub.getComments(workId, maxRecords);  
Comment [] comment = commentArray.getComment();
```

## 20.3.5 Configuration

This section provides reference information for each Configuration method. The Configuration methods include:

- ◆ [“setCompletedProcessTimeout” on page 438](#)
- ◆ [“setEngineConfiguration” on page 438](#)
- ◆ [“getCompletedProcessTimeout” on page 439](#)
- ◆ [“setEmailNotifications” on page 439](#)
- ◆ [“clearNIMCaches” on page 439](#)
- ◆ [“setWebServiceActivityTimeout” on page 439](#)
- ◆ [“getUserActivityTimeout” on page 440](#)
- ◆ [“getEmailNotifications” on page 440](#)
- ◆ [“setUserActivityTimeout” on page 440](#)
- ◆ [“getEngineConfiguration” on page 441](#)
- ◆ [“getWebServiceActivityTimeout” on page 441](#)

## setCompletedProcessTimeout

Used to set the timeout for completed processes. Processes that were completed more than timeout days ago are removed from the system. The default value is 120 days. The valid range is 0 days to 365 days.

### Method Signature

```
void setCompletedProcessTimeout(int time)
```

### Example

```
accessConfigurationSettings(SET_COMPLETED_PROCESS_TIMEOUT, new  
Integer(212) );
```

## setEngineConfiguration

Used to set workflow engine configuration parameters.

### Method Signature

```
void setEngineConfiguration(com.novell.soa.af.impl.soap.Configuration  
config)
```

### Parameters

Parameter	Description
minPoolSize	The minimum thread pool size.
maxnPoolSize	The maximum thread pool size.
initialPoolSize	The initial thread pool size.
keepAliveTime	Thread pool keep live time.
pendingInterval	The cluster synchronization time.
cleanupInterval	The interval between purging processes from databases.
retryQueueInterval	The interval between retrying failed processes.
maxShutdownTime	The maximum time to let threads complete work before engine shutdown.
userActivityTimeout	The default user activity timeout.
completedProcessTimeout	The default completed process timeout.
webServiceActivityTimeout	The default Web service activity timeout.
emailNotification	Turns email notification on or off.
processCacheInitialCapacity	The process cache initial capacity.
processCacheMaxCapacity	The process cache maximum capacity.
processCacheLoadFactor	The process cache load factor.
heartbeatInterval	The heartbeat interval.

Parameter	Description
heartbeatFactor	The heartbeat factor.

### Example

```
accessConfigurationSettings (SET_ENGINE_CONFIGURATION, new Integer (313)
);
```

### getCompletedProcessTimeout

Used to get the timeout for completed processes.

#### Method Signature

```
int getCompletedProcessTimeout()
```

### Example

```
accessConfigurationSettings (GET_COMPLETED_PROCESS_TIMEOUT, new
Integer (121) );
```

### setEmailNotifications

Used to globally enable or disable e-mail notifications.

#### Method Signature

```
void setEmailNotifications(boolean enable)
```

#### Parameters

Parameter	Description
enable	E-mail notifications are enabled if true; otherwise they are disabled.

### Example

```
accessConfigurationSettings (SET_EMAIL_NOTIFICATIONS, new
Boolean (false) );
```

### clearNIMCaches

Clear the Novell Integration Manager (previously named exteNd Composer) caches.

#### Method Signature

```
void clearNIMCaches()
```

### Example

```
accessConfigurationSettings (CLEAR_NIM_CACHES, new Object() );
```

### setWebServiceActivityTimeout

Used to set the timeout for Web service activities. The default value is 50 minutes. The valid range is 1 minute to 7 days.

### Method Signature

```
void setWebServiceActivityTimeout(int time)
```

### Parameters

Parameter	Description
time	The timeout value in minutes.

### Example

```
accessConfigurationSettings(SET_WEBSERVICE_ACTIVITY_TIMEOUT, new Integer(767) );
```

### getUserActivityTimeout

Used to get the timeout for user-facing activities.

### Method Signature

```
int getUserActivityTimeout()
```

### Example

```
accessConfigurationSettings(GET_USER_ACTIVITY_TIMEOUT, new Integer(3767) );
```

### getEmailNotifications

Used to determine if global e-mail notifications are enabled or disabled.

### Method Signature

```
boolean getEmailNotifications()
```

### Example

```
accessConfigurationSettings(GET_EMAIL_NOTIFICATIONS, new Boolean(true) );
```

### setUserActivityTimeout

Used to set the timeout for user-facing activities. The default value is no timeout (a value of zero). The valid range is 1 hour to 365 days.

### Method Signature

```
void setUserActivityTimeout(int time)
```

### Parameters

Parameter	Description
time	The timeout value in hours.

### Example

```
accessConfigurationSettings(SET_USER_ACTIVITY_TIMEOUT, new Integer(1767) );
```

### getEngineConfiguration

Used to get the workflow engine configuration parameters.

#### Method Signature

```
com.novell.soa.af.impl.soap.Configuration getEngineConfiguration()
```

### Example

```
accessConfigurationSettings(GET_ENGINE_CONFIGURATION, new Integer(141) );
```

### getWebServiceActivityTimeout

Used to get the timeout for Web service activities.

#### Method Signature

```
int getWebServiceActivityTimeout()
```

### Example

```
accessConfigurationSettings(GET_WEBSERVICE_ACTIVITY_TIMEOUT, new Integer(808) );
```

## 20.3.6 Miscellaneous

This section provides reference information for each Miscellaneous method. The Miscellaneous methods include:

- ♦ “getGraph” on page 441
- ♦ “getFlowDefinition” on page 442
- ♦ “getFormDefinition” on page 443
- ♦ “getVersion” on page 444

### getGraph

Used to get a JPG image of the workflow. The Graphviz program must be installed on the computer where the application server and the IDM User Application is running. For more information about Graphviz, see [Graphviz \(http://www.graphviz.org\)](http://www.graphviz.org).

#### Method Signature

```
byte[] getGraph(java.lang.String processId)
```

#### Parameters

Parameters	Description
processId	The request Id.

## Example

```
//
// Initialize and start a provisioning request
HashMap provMap = new HashMap();
provMap.put(Helper.RECIPIENT, recipient);
provMap.put("Provisioning_Request_To_Start_Key", "Enable Active
Directory Account (Mgr Approve-No Timeout)");
//
// Start request
// Calls method startProvisioningRequest on the provUtils
// utility object which refers to a utility class that does not
// ship with the Identity Manager User Application.
String requestId = provUtils.startProvisioningRequest(provMap,
null);
sleep(5);
//

//

Process process = stub.getProcess(requestId);
if(process != null)
{
    byte [] graph = null;
    if( (recipient.compareTo(process.getRecipient()) == 0) &&
(requestId.compareTo(process.getRequestId()) == 0) )
    {
        graph = stub.getGraph(process.getProcessId() );
    }
    //
    // Do assert
    Assert.assertNotNull("Graph is null.", graph);
}
}
```

## getFlowDefinition

Used to get the XML for a provisioning request.

### Method Signature

```
java.lang.String getFlowDefinition(java.lang.String processId)
```

### Parameters

Parameters	Description
processId	The request Id.

## Example

```
//
// Initialize and start a provisioning request
HashMap provMap = new HashMap();
provMap.put(Helper.RECIPIENT, recipient);
provMap.put("Provisioning_Request_To_Start_Key", "Enable Active
```

```

Directory Account (Mgr Approve-No Timeout)");
    //
    // Start request
    // Calls method startProvisioningRequest on the provUtils
    // utility object which refers to a utility class that does not
    // ship with the Identity Manager User Application.
    String requestId = provUtils.startProvisioningRequest(provMap,
null);
    sleep(5);
    //

    //

    Process process = stub.getProcess(requestId);
    if(process != null)
    {
        String XMLFlowDefinition = null;
        if( (recipient.compareTo(process.getRecipient()) == 0) &&
(requestId.compareTo(process.getRequestId()) == 0) )
        {
            XMLFlowDefinition =
stub.getFlowDefinition(process.getProcessId() );
        }
        //
        // Do assert
        Assert.assertNotNull("Flow Definition is null.",
XMLFlowDefinition);
    }

```

## getFormDefinition

Used to get the XML for a form for a provisioning request.

### Method Signature

```
java.lang.String getFormDefinition(java.lang.String processId)
```

### Parameters

Parameters	Description
processId	The request Id.

### Example

```

//
// Initialize and start a provisioning request
HashMap provMap = new HashMap();
provMap.put(Helper.RECIPIENT, recipient);
provMap.put("Provisioning_Request_To_Start_Key", "Enable Active
Directory Account (Mgr Approve-No Timeout)");
//
// Start request
// Calls method startProvisioningRequest on the provUtils
// utility object which refers to a utility class that does not

```

```

// ship with the Identity Manager User Application.
String requestId = provUtils.startProvisioningRequest(provMap,
null);
sleep(5);
//

//

Process process = stub.getProcess(requestId);
if(process != null)
{

    String XMLFormDefinition = null;
    if( (recipient.compareTo(process.getRecipient()) == 0) &&
(requestId.compareTo(process.getRequestId()) == 0) )
    {
        XMLFormDefinition =
stub.getFormDefinition(process.getProcessId() );
    }
    //
    // Do assert
    Assert.assertNotNull("Form Definition is null.",
XMLFormDefinition);
}

```

## getVersion

Used to get the version of the workflow system.

### Method Signature

```
com.novell.soa.af.impl.soap.T_Version getVersion()
```

### Example

```

StringBuffer result = new StringBuffer();

T_Version version = stub.getVersion();
if (version != null)
{
    result.append(" Major = " + version.getMajor() );
    result.append(" Minor = " + version.getMinor() );
    result.append(" Revision = " + version.getRevision() );

    System.out.println("Version Information " + result.toString());
}

```

## 20.3.7 Cluster

This section provides reference information for each Cluster method. The Cluster methods include:

- ◆ [“getEngineState” on page 445](#)
- ◆ [“reassignAllProcesses” on page 445](#)
- ◆ [“getEngineState” on page 446](#)



- ◆ “reassignPercentageProcesses” on page 446
- ◆ “reassignProcesses” on page 447
- ◆ “removeEngine” on page 447

## getEngineState

Used to get the IEngineState for a workflow engine, specified by engine Id.

### Method Signature

```
com.novell.soa.af.impl.soap.EngineState
getEngineState(java.lang.String engineId)
```

### Parameters

Parameter	Description
engineId	The Id of the workflow engine.

### Example

```
EngineStateArray engineStateArray = stub.getClusterState();
EngineState [] engineState = engineStateArray.getEngineStates();
if(engineState != null)
{
    LoggerUtils.sendToLogAndConsole("EngineCount in cluster:" +
engineState.length);
    for(int index = 0; index < engineState.length; index++)
    {
        EngineState engine =
stub.getEngineState(engineState[index].getEngineId() );
        LoggerUtils.sendToLogAndConsole(
            "Engine Id: " + engine.getEngineId() + "\n" +
            "Engine status: " + engine.getEngineStatus() + "\n" +
            "Value of engine status: " +
engine.getValueOfEngineStatus() + "\n" +
            "Heartbeat: " + ((engine.getHeartbeat() != null) ?
engine.getHeartbeat().getTime().toString() : "null") + "\n" +
            "Shutdown time: " + ((engine.getShutdownTime() != null)
? engine.getShutdownTime().getTime().toString() : "null") + "\n" +
            "Start time: " + ((engine.getStartTime() != null) ?
engine.getStartTime().getTime().toString() : "null") );
    }
}
```

## reassignAllProcesses

Used to reassign all processes from the source engine to a list of target engines.

### Method Signature

```
int reassignAllProcesses(java.lang.String sourceEngineId,
com.novell.soa.af.impl.soap.StringArray targetEngineIds)
```

## Parameters

Parameter	Description
sourceEngineId	The Id of the source workflow engine.
targetEngineIds	The Ids of the target workflow engines.

## getEngineState

Used to get a list that contains an IEngineState object for each engine in the cluster.

### Method Signature

```
public com.novell.soa.af.impl.soap.EngineState  
getEngineState(java.lang.String engineId)
```

## Parameters

Parameter	Description
engineId	The Id of the workflow engine.

## Example

```
EngineStateArray engineStateArray = stub.getClusterState();  
EngineState [] engineState = engineStateArray.getEngineStates();  
if(engineState != null)  
{  
    LoggerUtils.sendToLogAndConsole("EngineCount in cluster:" +  
engineState.length);  
    for(int index = 0; index < engineState.length; index++)  
    {  
        EngineState engine =  
stub.getEngineState(engineState[index].getEngineId() );  
        LoggerUtils.sendToLogAndConsole(  
            "Engine Id: " + engine.getEngineId() + "\n" +  
            "Engine status: " + engine.getEngineStatus() + "\n" +  
            "Value of engine status: " +  
engine.getValueOfEngineStatus() + "\n" +  
            "Heartbeat: " + ( engine.getHeartbeat() != null) ?  
engine.getHeartbeat().getTime().toString() : "null" ) + "\n" +  
            "Shutdown time: " + ((engine.getShutdownTime() != null)  
? engine.getShutdownTime().getTime().toString() : "null") + "\n" +  
            "Start time: " + ((engine.getStartTime() != null) ?  
engine.getStartTime().getTime().toString() : "null" ) );  
    }  
}
```

## reassignPercentageProcesses

Used to reassign a percentage of processes from the source engine to the target engine.

## Method Signature

```
int reassignPercentageProcesses(int percent, java.lang.String  
sourceEngineId, java.lang.String targetEngineId)
```

## Parameters

Parameter	Description
percent	An integer representing the percentage of processes to be reassigned.
sourceEngineId	The Id of the source workflow engine.
targetEngineIds	The Id of the target workflow engine.

## reassignProcesses

Used to reassign one or more processes from the source engine to the target engine.

## Method Signature

```
int reassignProcesses(com.novell.soa.af.impl.soap.StringArray  
requestIds, java.lang.String sourceEngineId, java.lang.String  
targetEngineId)
```

## Parameters

Parameter	Description
requestIds	A list of requestIds of the processes to be reassigned.
sourceEngineId	The Id of the source workflow engine.
targetEngineIds	The Id of the target workflow engine.

## removeEngine

Used to remove an engine from the cluster state table. The engine must be in the SHUTDOWN or TIMEDOUT state.

## Method Signature

```
void removeEngine(java.lang.String engineId)
```

## Parameters

Parameter	Description
engineId	The Id of the workflow engine to be removed.



# Metrics Web Service

This section describes the Metrics Web Service, which provides metrics for provisioning workflows. Topics include:

- ♦ [Section 21.1, “About the Metrics Web Service,” on page 449](#)
- ♦ [Section 21.2, “Metrics Web Service API,” on page 458](#)
- ♦ [Section 21.3, “Metrics Web Service Examples,” on page 462](#)

## 21.1 About the Metrics Web Service

The workflow engine includes a Web Service for gathering workflow metrics. The addition of the Metrics Web Service to the workflow engine lets you monitor an approval flow process. In addition, it provides indicators the business manager can use to modify the process for optimal performance.

The metrics are based on traditional business process flow management principles, which emphasize the need for metrics to be actionable. This ensures that the metrics provided match what an operations manager usually looks for when analyzing and optimizing business flows. Therefore, the metrics identify bottlenecks and provide other capacity indicators. The Metrics Web Service allows you to narrow down the metrics to a common and established set of data, instead of trying to anticipate the myriad of metrics and reports that can be created for a business process flow.

When working with the Metrics Web Service, you should keep in mind that the service is not intended to be an all-purpose metrics system:

- ♦ The Metrics Web Service is not a reporting tool or reporting engine. Consequently it does not use a complex query language.
- ♦ The Metrics Web Service is not designed as an all-purpose performance management system. This helps to limit the impact of the needed queries against the live system being monitored.

Operations management stresses three key internal process performance measures that together capture the essence of process flow. These three measures can serve as leading indicators of customer satisfaction: flow time, flow rate, and inventory.

With these measures, an operations manager can answer the following questions:

- ♦ On average, how much time does a provisioning request spend within the process boundaries? (Flow time)
- ♦ On average, how many provisioning requests pass through the process per unit of time? (Flow rate)
- ♦ On average, how many provisioning requests are within the process boundaries at any point in time? (Inventory)

These three measures are related by Little's law:

$$\text{Inventory} = \text{Flow Rate} * \text{Flow Time}$$

## 21.1.1 Web Service Semantics

The following semantics apply to the use of the Metrics Web Service:

- ◆ Activities in the Metrics Web Service refer only to user-facing activities (Approval Activities). Negligible running time and the impossibility of controlling the other activities make collecting metrics for these inappropriate.
- ◆ The Metrics Web Service distinguishes between Working Days and Calendar Days. Calendar Days refer to all days between two dates. Working Days refer only to working days between two dates. Since working days may be specified differently in different environments, all Working Days methods return a raw data set that can be used to compute what is appropriate. If no such detail is required, the Calendar Days method will readily return the appropriate metric.

## 21.1.2 Web Service Endpoint

The Metrics Web Service endpoint can be accessed at the following URL:

`http://server:port/warcontext/metrics/service`

## 21.1.3 Web Service Methods Grouped by Security Permissions

The service is secured using Basic Authentication. Therefore, you should use SSL to connect to the service. The service uses the same security layer as the User Application and consequently not all service operations are allowed to all users. Only a Provisioning Administrator will have unconditional access to all the methods. On the other hand team managers will only have access to metrics that pertain to their team and team members.

Hence the Metrics Web Service operations are divided into 3 categories according to role and security permissions:

- ◆ Team manager operations
- ◆ Provisioning Application Administrator operations
- ◆ Utility operations

### Team Metrics

Team managers can only retrieve metrics on a team for which they are managers. These are the methods are available to team managers:

**Table 21-1** *Team Metrics Methods*

Method	Description
<code>getClaimedFlowTimeCalendarDays</code>	Returns the average time in hours the provisioning request was claimed for within the specified time interval
<code>getClaimedFlowTimeWorkingDays</code>	Returns the result set required to compute the average time the provisioning request was claimed for the specified time interval

Method	Description
getToClaimedFlowTimeCalendarDays	Returns the average time in hours it took the provisioning request to be claimed from the moment it was available to addressees
getToClaimedFlowTimeWorkingDays	Returns the average time it took the provisioning request to be claimed from the moment it was available to addressees, within the specified time interval
getClaimedInventory	Returns the average number of provisioning requests claimed within the specified interval
getClaimedThroughputWorkingDays	Returns the average number of provisioning requests claimed within the specified interval
getTeamLongestRunning	Returns a result set of the longest running request in seconds for which members of the team acted as addressees
getTeamFlowHistory	Returns a result set of the activity outcomes, addressee and addressee messages for the specified list of provisioning requests
getTeamHistoryForInitiators	Returns a result set of the provisioning request and their status for which members of the team acted as initiators
getTeamHistoryForRecipients	Returns a result set of the provisioning request and their status for which members of the team acted as recipients
getTeamRunningTime	Returns the average time in seconds the specified provisioning requests have been running
getTeamDecisionCount	Returns the number of decisions the team made as addressees for the specified provisioning request
getTeamInitiatedCount	Returns the number of provisioning requests initiated by the team
getTeamRecipientCount	Returns the provisioning requests for which a member of the team acts as a recipient

## Provisioning Administrator Metrics

This role is unrestricted and may perform any of the service's operations. These are the methods that are only available to Provisioning Administrators.

**Table 21-2** *Provisioning Administrator Metrics Methods*

Method	Description
getActivityFlowTimeCalendarDays	Returns the average time in hours the user activity took to complete
getActivityFlowTimeWorkingDays	Returns the result set required to compute the average time the user activity took to complete

<b>Method</b>	<b>Description</b>
getActivityInventory	Returns the average number of provisioning requests at any one time for the specified user activity
getActivityThroughputCalendarDays	Returns the average number of provisioning requests per hours that exited the specified user activity within the specified time interval
getActivityThroughputWorkingDays	Returns the result set required to compute average time it takes a provisioning request to complete for the specified time interval
getFlowTimeCalendarDays	Returns average time in hours it takes a provisioning request to complete for the specified time interval
getFlowTimeWorkingDays	Returns the result set required to compute average time it takes a provisioning request to complete for the specified time interval
getInventory	Returns the average number of provisioning requests in the system at any one time for the specified time interval
getLongestClaimed	Returns a result set of the provisioning requests that have been claimed but not acted upon (time in seconds)
getLongestRunning	Returns a result set of the longest running provisioning requests (time in seconds)
getFlowCount	Returns the number of provisioning requests
getFlowHistory	Returns a result set of the activity outcomes, addressee and addressee messages for the specified list of provisioning requests
getFlowHistoryForInitiators	Returns the list of provisioning requests and their status for the specified initiators
getFlowHistoryForRecipients	Returns the list of provisioning requests and their status for the specified recipients
getRunningTime	Returns the average running time in seconds for the provisioning requests that are currently running
getThroughputCalendarDays	Returns the average number of provisioning requests per hour that completed within the specified interval
getThroughputWorkingDays	Returns the result set required to compute the average number per hour of provisioning requests that completed within the specified interval

### **Utility Operations**

Both team managers and administrators may perform these operations:



**Table 21-3** *Utility Operations*

Method	Description
getVersion	Returns the server version of the Web service. This should always be used to ensure version matching between client and server code.
getAllProvisioningFlows	Returns the list of provisioning flows that the logged in user can see
getUserActivityOnlyFlow	Returns a GraphViz DOT ( <a href="http://www.graphviz.org/">http://www.graphviz.org/</a> ) representation of the provisioning workflow
getTeams	Returns the list of teams the logged in user manages
getTeamMembers	Returns the list of team members for the specified team

## 21.1.4 Specifying Filters

As mentioned above, the Metrics Webservice does not use a complex query language. Instead filters can be used to narrow results by criteria such as date ranges or approval statuses.

These are the filters you can specify (see type FilterConstants in service's WSDL):

**Table 21-4** *Filters for Narrowing Metric Results*

Filter	Description
KEY_ACTIVITY_ID	A User Activity Id as defined in the provisioning request definition
KEY_APPROVAL_STATUS	The approval status for the provisioning request. Possible values are: <ul style="list-style-type: none"><li>◆ ApprovalStatusProcessing</li><li>◆ ApprovalStatusDenied</li><li>◆ ApprovalStatusRefused</li><li>◆ ApprovalStatusApproved</li><li>◆ ApprovalStatusRetract</li><li>◆ ApprovalStatusError</li></ul>
KEY_ENTITLEMENT_STATE	The state of the entitlement associated with the provisioning request. Possible values are: <ul style="list-style-type: none"><li>◆ EntitlementUnknown</li><li>◆ EntitlementGranted</li><li>◆ EntitlementRevoked</li></ul>

Filter	Description
KEY_ENTITLEMENT_STATUS	The status of the entitlement associated with the provisioning request. Possible values are: <ul style="list-style-type: none"> <li>◆ EntitlementSuccess</li> <li>◆ EntitlementWarning</li> <li>◆ EntitlementError</li> <li>◆ EntitlementFatal</li> </ul>
KEY_INITIATOR	The user DN of the workflow initiator
KEY_L_COMPLETION_TIME	The date indicating the start of the interval for workflow completion
KEY_S_COMPLETION_TIME	The date indicating the end of the interval for workflow completion
KEY_L_ENTITLEMENT_TIME	The date indicating the start of the interval for entitlement time
KEY_S_ENTITLEMENT_TIME	The date indicating the end of the interval for entitlement time
KEY_S_START_TIME	The date indicating the start of the interval for workflow start
KEY_L_START_TIME	The date indicating the end of the interval for workflow start
KEY_PROCESS_ID	The DN of the provisioning request
KEY_PROCESS_STATUS	The status of the provisioning request. Possible values are: <ul style="list-style-type: none"> <li>◆ ProcessStatusRunning</li> <li>◆ ProcessStatusStopped</li> <li>◆ ProcessStatusTerminated</li> <li>◆ ProcessStatusCompleted</li> </ul>
KEY_PROCESS_VERSION	The process version associated with the workflow version
KEY_RECIPIENT	The user DN of the workflow recipient
KEY_REQUEST_ID	The unique id associated with the workflow instance

Here is a Java example. Note that your code will obviously differ depending on the platform you use for your Web Service client:

```
HashMap map=new HashMap();
map.put(MetricsFilter.KEY_PROCESS_STATUS,
MetricsFilter.ProcessStatusRunning);
double flowtime = metrics.getFlowTimeCalendarDays(processId,
processVer, activity, 5, calendar1.getTime(),
calendar2.getTime(), MetricsFilter.ACTIVITY_CLAIMED,
MetricsFilter.ACTIVITY_FORWARDED, map);
```

...

Please consult the WebService WSDL for more information:

<http://server:port/warcontext/metrics/service?WSDL>

## 21.1.5 Locating the Stub Classes

The stub classes you need for the Metrics Web Service are located in the `wsclient.jar`, which ships with the product. This JAR file is located in the `idmuserapp/lib` folder. To allow your code to find the stub classes, you need to add this JAR to your classpath.

## 21.1.6 Obtaining the Remote Interface

Before you can begin calling methods on the Metrics Web Service, you need to have a reference to the remote interface.

The code below shows how to obtain the remote interface.

```
import java.util.Locale;
import java.util.Properties;
import javax.naming.Context;
import javax.naming.InitialContext;
import javax.xml.rpc.Stub;
import com.novell.qa.soap.common.util.LoggerUtils;
import com.novell.qa.soap.common.util.LoginData;
import com.novell.qa.soap.common.util.ServiceUtils;
import com.novell.soa.af.ClusterException;
import com.novell.soa.af.impl.soap.Provisioning;
import com.novell.soa.af.impl.soap.ProvisioningService;
import com.novell.test.automator.framework.TestProgramException;
import com.rational.test.ft.script.RationalTestScript;
import com.novell.soa.af.metrics.soap.MetricsClientHelper;
import com.novell.soa.af.metrics.soap.MetricsStubWrapper;
import com.novell.soa.af.metrics.soap.impl.MetricsService;
import com.novell.soa.af.metrics.soap.impl.MetricsServiceException;
import com.novell.soa.af.metrics.soap.impl.IRemoteMetrics;

/**
 * Method to obtain the remote interface to the Metrics endpoint
 * @param _url
 * @param _username
 * @param _password
 * @return IRemoteMetrics interface
 * @throws Exception
 */
private IRemoteMetrics getStub(String _url, String _username, String
_password) throws Exception

{
    Properties properties = new Properties();
    properties.put(Context.INITIAL_CONTEXT_FACTORY,
"org.jnp.interfaces.NamingContextFactory");
```

```

String lookup =
"xmlrpc:soap:com.novell.soa.af.metrics.soap.impl.MetricsService";

InitialContext ctx = new InitialContext();
MetricsService svc = (MetricsService) ctx.lookup(lookup);

Stub stub = (Stub)svc.getIRemoteMetricsPort();

stub._setProperty(Stub.USERNAME_PROPERTY, _username);
stub._setProperty(Stub.PASSWORD_PROPERTY, _password);
stub._setProperty(Stub.SESSION_MAINTAIN_PROPERTY, Boolean.TRUE);
stub._setProperty(Stub.ENDPOINT_ADDRESS_PROPERTY, _url);

return (IRemoteMetrics) stub;
}

```

Here's the code to call the method defined above:

```

IRemoteMetrics stub = null;
try
{
    //
    // Get the stub
    String url = m_loginData.getURL();
    stub = getStub(url, _username, _password);
}
catch(Exception e)
{
    String msg = e.getMessage();
    LoggerUtils.logError(msg);
    throw new TestProgramException(msg);
}
return stub;

```

In order for this code to work, the URL passed to the `getStub()` method would need to point to the SOAP endpoint, as shown below:

```
http://myserver:8080/IDMProv/metrics/service
```

The user name needs to be a fully qualified DN such as the following:

```
"cn=admin,ou=idmsample,o=novell"
```

## 21.1.7 Metrics Configuration Settings

The Metrics Web Service impact on the live system is limited by 4 settings that may be modified in the `IDMfw.jar/WorkflowService-conf/config.xml` file:

**Table 21-5** *Metrics Configuration Settings*

Key in config.xml	Description
<key>Metrics/TimeRequiredBetweenClientRequests</key>	Required time between client requests in ms (default is 250 ms)

Key in config.xml	Description
<key>Metrics/MaxClients</key>	Maximum number of concurrent client sessions (default is 10)
<key>Metrics/MaxRows</key>	Maximum number of rows any query can return
<key>Metrics/MaxTeamMembers</key>	Maximum Number of Team Members
<key>Metrics/SecondsToAnythingDivider</key>	The divider used in all throughput computations (default 3600). Original values are in seconds so all throughputs are consequently per hour.

When the limit has been reached for any of these settings a Web Service fault is generated indicating the problem. In addition, for settings 1 and 2, the fault includes an error code.

- If the fault is caused by a TimeRequiredBetweenClientRequests error, the error code is 100.
- If the fault is caused by a MaxClients errors, the error code is 200.
- If the fault is caused by a closed client connection error, the error code is 300.

Client consumers of the Metrics Web Service will have to include in their code provisions for retrying a request. Here is a simple Java listing that shows how this can be achieved:

```

try {
    for (int i = 0; i < retries; i++) {
        try {
            return metrics.getFlowCount(strDN, strId, new
                HashMap());
        } catch (MetricsServiceException e) {
            if (e.getErrorCode() == 100 //subsequent call
                error
                || e.getErrorCode() == 200) { //too many
                clients
                try {
                    Thread.sleep(retryPause);
                }

                catch (Exception ex) {
                    // to nothing
                }
            } else {
                throw e2;
            }
        } else {
            throw new RuntimeException(e);
        }
    } catch (Exception e) {
        throw e;
    }
}
throw new RuntimeException("Did not succeed making
    webservice call");
} catch (Exception e) {

```

```

        throw e;
    }
}
...

```

## 21.2 Metrics Web Service API

This section provides details about the methods available with the Metrics web service.

All of the methods throw `MetricsServiceException` and `RemoteException`. To improve readability, the throws clause has been omitted from the method signatures.

### 21.2.1 Team Manager Methods

This section provides reference information for each method available to team managers.

#### **getClaimedFlowTimeCalendarDays**

**Syntax:** Here's the method signature:

```
double getClaimedFlowTimeCalendarDays(String processId, String
processVersion, Date startCompletionTime, Date endCompletionTime,
String teamDN, Map filters)
```

#### **getClaimedFlowTimeWorkingDays**

**Syntax:** Here is the method signature:

```
MetricsResultset getClaimedFlowTimeWorkingDays(String processId,
String processVersion, Date startCompletionTime, Date
endCompletionTime, String teamDN, Map filters)
```

#### **getToClaimedFlowTimeCalendarDays**

**Syntax:** Here is the method signature:

```
double getToClaimFlowTimeCalendarDays(String processId, String
processVersion, Date startCompletionTime, Date endCompletionTime,
String teamDN, Map filters)
```

#### **getToClaimedFlowTimeWorkingDays**

**Syntax:** Here is the method signature:

```
MetricsResultset getToClaimFlowTimeWorkingDays(String processId,
String processVersion, Date startCompletionTime, Date
endCompletionTime, String teamDN, Map filters)
```

#### **getClaimedInventory**

**Syntax:** Here is the method signature:

```
double getClaimedInventory(String processId, String processVersion,
Date startCompletionTime, Date endCompletionTime, String teamDN, Map
filters)
```

## **getClaimedThroughputCalendarDays**

**Syntax:** Here is the method signature:

```
double getClaimedThroughputCalendarDays(String processId, String processVersion, Date startCompletionTime, Date endCompletionTime, String teamDN, Map filters)
```

## **getClaimedThroughputWorkingDays**

**Syntax:** Here is the method signature:

```
MetricsResultset getClaimedThroughputWorkingDays(String processId, String processVersion, Date startCompletionTime, Date endCompletionTime, String teamDN, Map filters)
```

## **getTeamLongestRunning**

**Syntax:** Here is the method signature:

```
MetricsResultset getTeamLongestRunning(String processId, String processVersion, String teamDN, Map filters)
```

## **getTeamLongestClaimed**

**Syntax:** Here is the method signature:

```
MetricsResultset getTeamLongestClaimed(String processId, String processVersion, String teamDN, Map filters)
```

## **getTeamFlowHistory**

**Syntax:** Here is the method signature:

```
MetricsResultset getTeamFlowHistory(List requestIds)
```

## **getTeamHistoryForInitiators**

**Syntax:** Here is the method signature:

```
MetricsResultset getTeamHistoryForInitiators(String teamDN, Map filters)
```

## **getTeamHistoryForRecipients**

**Syntax:** Here is the method signature:

```
MetricsResultset getTeamHistoryForRecipients(String teamDN, Map filters)
```

## **getTeamRunningTime**

**Syntax:** Here is the method signature:

```
double getTeamRunningTime(String processId, String processVersion, String teamDN, Map filters)
```

## **getTeamDecisionCount**

**Syntax:** Here is the method signature:

```
int getTeamDecisionCount(String processId, String processVersion,
String teamDN, Map filters)
```

### **getTeamInitiatedCount**

**Syntax:** Here is the method signature:

```
int getTeamInitiatedCount(String processId, String processVersion,
String teamDN, Map filters)
```

### **getTeamRecipientCount**

**Syntax:** Here is the method signature:

```
int getTeamRecipientCount(String processId, String processVersion,
String teamDN, Map filters)
```

## **21.2.2 Provisioning Application Administrator Methods**

This section provides reference information for each method available to the Provisioning Application Administrator.

### **getActivityFlowTimeCalendarDays**

**Syntax:** Here is the method signature:

```
double getActivityFlowTimeCalendarDays(String processId, String
processVer, String activityId, Date startTime, Date completeTime, Map
filters)
```

### **getActivityFlowTimeWorkingDays**

**Syntax:** Here is the method signature:

```
MetricsResultset getActivityFlowTimeWorkingDays(String processId,
String processVer, String activityId, Date startTime, Date
completeTime, Map filters)
```

### **getActivityInventory**

**Syntax:** Here is the method signature:

```
double getActivityInventory(String processId, String processVersion,
String activityId, Date startTime, Date completeTime, Map filters)
```

### **getActivityThroughputCalendarDays**

**Syntax:** Here is the method signature:

```
double getActivityThroughputCalendarDays(String processId, String
processVersion, String activityId, Date startTime, Date
completiontime, Map filters)
```

### **getActivityThroughputWorkingDays**

**Syntax:** Here is the method signature:



```
MetricsResultset getActivityThroughputWorkingDays(String processId,  
String processVersion, String activityId, Date startTime, Date  
completiontime, Map filters)
```

### **getInventory**

**Syntax:** Here is the method signature:

```
double getInventory(String processId, String processVersion, Date  
startTime, Date completeTime, Map filters)
```

### **getLongestClaimed**

**Syntax:** Here is the method signature:

```
MetricsResultset getLongestClaimed(String processId, String  
processVersion, Map filters)
```

### **getLongestRunning**

**Syntax:** Here is the method signature:

```
MetricsResultset getLongestRunning(String processId, String  
processVersion, Map filters)
```

### **getFlowCount**

**Syntax:** Here is the method signature:

```
int getFlowCount(String processId, String processVersion, Map filters)
```

### **getFlowHistory**

**Syntax:** Here is the method signature:

```
MetricsResultset getFlowHistory(List requestIds)
```

### **getFlowHistoryForInitiators**

**Syntax:** Here is the method signature:

```
MetricsResultset getFlowHistoryForInitiators(List initiators, Map  
filters)
```

### **getFlowHistoryForRecipients**

**Syntax:** Here is the method signature:

```
MetricsResultset getFlowHistoryForRecipients(List recipients, Map  
filters)
```

### **getRunningTime**

**Syntax:** Here is the method signature:

```
double getRunningTime(String processId, String processVersion, Map  
filters)
```

### **getThroughputCalendarDays**

**Syntax:** Here is the method signature:

```
double getThroughputCalendarDays(String processId, String  
processVersion, Date startTime, Date completiontime, Map filters)
```

### **getThroughputWorkingDays**

**Syntax:** Here is the method signature:

```
MetricsResultset getActivityThroughputWorkingDays(String processId,  
String processVersion, String activityId, Date startTime, Date  
completiontime, Map filters)
```

## **21.2.3 Utility Methods**

This section provides reference information for each utility method. Both team managers and administrators can call these methods.

### **getVersion**

**Syntax:** Here is the method signature:

```
VersionVO getVersion()
```

### **getAllProvisioningFlows**

**Syntax:** Here is the method signature:

```
MetricsResultset getAllProvisioningFlows()
```

### **getUserActivityOnlyFlow**

**Syntax:** Here is the method signature:

```
BasicModelVO getUserActivityOnlyFlow(String processId, String  
processVer)
```

### **getTeams**

**Syntax:** Here is the method signature:

```
MetricsResultset getTeams()
```

### **getTeamMembers**

**Syntax:** Here is the method signature:

```
MetricsResultset getTeamMembers(String teamDN)
```

## **21.3 Metrics Web Service Examples**

This section provides examples that show how to use the Metrics Web Service to gather workflow metrics. The examples assume that you have obtained a stub, as shown in [Section 21.1.6, “Obtaining the Remote Interface,” on page 455](#), and potentially wrapped it in an object that handles the potential error conditions, as described in [Section 21.1.7, “Metrics Configuration Settings,” on page 456](#).

## 21.3.1 General Examples

This example uses the KEY\_APPROVAL\_STATUS filter to compare the decision outcomes for a provisioning request type. This could be used to generate a pie chart for example.

```
FilterConstants constants=new FilterConstants();
Map<MetricsFilter, Object> map = new HashMap<MetricsFilter, Object>();
map.put(MetricsFilter.KEY_APPROVAL_STATUS, constants.getApprovalStatusA
pproved());
double
accepted=stubWrapper.getFlowCount(processId,processVersion,map);
map.put(MetricsFilter.KEY_APPROVAL_STATUS, constants.getApprovalStatusD
enied());
double denied=stubWrapper.getFlowCount(processId,processVersion,map);
map.put(MetricsFilter.KEY_APPROVAL_STATUS, constants.getApprovalStatusE
rror());
double error=stubWrapper.getFlowCount(processId,processVersion,map);
map.put(MetricsFilter.KEY_APPROVAL_STATUS, constants.getApprovalStatusR
etract());
double
retracted=stubWrapper.getFlowCount(processId,processVersion,map);
map.put(MetricsFilter.KEY_APPROVAL_STATUS,
constants.getApprovalStatusRefused());
double refused = stubWrapper.getFlowCount(processId,
processVersion, map);
```

Additional filters may be specified by adding appropriate entries to the filter map. The following examples illustrate how you might add various types of filters.

### Adding a start date filter

To add a start date filter (01/01/2006 < date < 02/01/2006):

```
Calendar startDate=Calendar.getInstance();
startDate.set(2006,0,1);
Calendar endDate=Calendar.getInstance();
endDate.set(2006,1,1);
map.put(MetricsFilter.KEY_L_START_TIME,startDate);
map.put(MetricsFilter.KEY_S_START_TIME,endDate)
```

### Adding a completion date filter

To add a completion date filter (02/01/2005 < date <03/01/2005)

```
Calendar startDate=Calendar.getInstance();
startDate.set(2006,0,1);
Calendar endDate=Calendar.getInstance();
endDate.set(2006,1,1);
map.put(MetricsFilter.KEY_L_COMPLETION_TIME,startDate);
map.put(MetricsFilter.KEY_S_COMPLETION_TIME,endDate)
```

### Narrowing requests to a specific initiator

To narrow down counted requests to a specific initiator

```
map.put(MetricsFilter.KEY_INITIATOR, "cn=admin,ou=idmsample,o=novell");
```

## Narrowing requests to a specific recipient

To narrow down counted requests to a specific recipient

```
map.put (MetricsFilter.KEY_RECIPIENT, "cn=admin, ou=idmsample, o=novell");
```

## 21.3.2 Other Examples

The following examples illustrate the use of various methods for retrieving workflow counts.

### Retrieving decision counts for a team

This example describes how to retrieve the various decision outcomes of a team. The team's DN is required and can be obtained by using the `getTeams()` method:

```
FilterConstants constants=new FilterConstants();
Map<MetricsFilter, Object> map = new HashMap<MetricsFilter, Object>();
map.put (MetricsFilter.KEY_ACTIVITY_END,
constants.getActivityApproved());
double accepted = stubWrapper.getTeamDecisionCount (processId,
processVersion, teamDN, map);
map.put (MetricsFilter.KEY_ACTIVITY_END,
constants.getActivityDenied());
double denied = stubWrapper.getTeamDecisionCount (processId,
processVersion, teamDN, map);
map.put (MetricsFilter.KEY_ACTIVITY_END,
constants.getActivityReassigned());
double reassigned = stubWrapper.getTeamDecisionCount (processId,
processVersion, teamDN, map);
map.put (MetricsFilter.KEY_ACTIVITY_END,
constants.getActivityRefused());
double refused = stubWrapper.getTeamDecisionCount (processId,
processVersion, teamDN, map);
```

### Retrieving decision counts for requests where team members are recipients

This example describes how to retrieve the various decisions outcomes for requests for which members of the team act as recipients

```
FilterConstants constants = new FilterConstants();
Map<MetricsFilter, Object> map = new HashMap<MetricsFilter, Object>();
map.put (MetricsFilter.KEY_APPROVAL_STATUS,
constants.getActivityApproved());
double accepted = stubWrapper.getTeamRecipientCount (processId,
processVersion, teamDN, map);
map.put (MetricsFilter.KEY_APPROVAL_STATUS,
constants.getApprovalStatusDenied());
double denied = stubWrapper.getTeamRecipientCount (processId,
processVersion, teamDN, map);
map.put (MetricsFilter.KEY_APPROVAL_STATUS,
constants.getApprovalStatusError());
double error = stubWrapper.getTeamRecipientCount (processId,
processVersion, teamDN, map);
map.put (MetricsFilter.KEY_APPROVAL_STATUS,
constants.getApprovalStatusError());
double retracted = stubWrapper.getTeamRecipientCount (processId,
```

```

processVersion, teamDN, map);
map.put(MetricsFilter.KEY_APPROVAL_STATUS,
constants.getApprovalStatusRefused());
double refused = stubWrapper.getTeamRecipientCount(processId,
processVersion, teamDN, map);

```

### Retrieving requests that have been claimed but not acted on

This example describes how to retrieve the requests started after 03/01/2006 that have been claimed but not acted upon.

```

Map<MetricsFilter, Object> map = new HashMap<MetricsFilter, Object>();
Calendar startDate=Calendar.getInstance();
startDate.set(2006,2,1);
map.put(MetricsFilter.KEY_L_START_TIME,startDate);
MetricsResultset rset = stubWrapper.getLongestClaimed(processId,
processVersion, map);

```

### Retrieving the longest running requests started by a particular user

This example describes how to retrieve the longest running requests that have been started by initiator "cn=admin,ou=idmsample,o=novell";

```

Map<MetricsFilter, Object> map = new HashMap<MetricsFilter, Object>();
map.put(MetricsFilter.KEY_INITIATOR,"cn=admin,ou=idmsample,o=novell");
;
MetricsResultset rset = stubWrapper.getLongestRunning(processId,
processVersion, map);

```

### Retrieving activity inventory

This example describes the average inventory for users handling decision with activity id "managerApproval" between 01/01/2006 and 02/01/2006

```

Map<MetricsFilter, Object> map = new HashMap<MetricsFilter, Object>();
Calendar startDate=Calendar.getInstance();
startDate.set(2006,0,1);
Calendar endDate=Calendar.getInstance();
endDate.set(2006,1,1);
MetricsResultset rset = stubWrapper.getActivityInventory(processId,
processVersion,"managerApproval", startDate, endDate, map );

```

### Retrieving the Claimed Throughput and Inventory for a Team

This example describes the team's throughput and inventory over the time interval between 01/01/2006 and 02/01/2006

```

Map<MetricsFilter, Object> map = new HashMap<MetricsFilter, Object>();
Calendar startDate=Calendar.getInstance();
startDate.set(2006,0,1);
Calendar endDate=Calendar.getInstance();
endDate.set(2006,1,1);
double throughput =
stubWrapper.getClaimedThroughputCalendarDays(processId,
processVersion, startDate, endDate,teamDN, map);
double inventory = stubWrapper.getClaimedInventory(processId,
processVersion, startDate, endDate, teamDN, map)

```



This section describes the Notification Web Service, which allows SOAP clients to use the e-mail notification facility. Topics include:

- ♦ [Section 22.1, “About the Notification Web Service,” on page 467](#)
- ♦ [Section 22.2, “Notification Web Service API,” on page 468](#)
- ♦ [Section 22.3, “Notification Example,” on page 473](#)

## 22.1 About the Notification Web Service

The Identity Manager provisioning module includes an e-mail notification facility that lets you send e-mail messages to notify users of changes in the state of the provisioning system, as well as tasks that they need to perform. To support access by third-party software applications, the notification facility includes a Web service endpoint. The endpoint lets you send an e-mail message to one or more users. When you send an e-mail, you include parameters that specify the target e-mail address, the e-mail template to use, and the replacement values for tokens in the e-mail template.

This Appendix describes the programming interface for the Notification Web Service.

### 22.1.1 Accessing the Test Page

You can access the Notification Web Service endpoint using a URL similar to the following:

```
http://server:port/warcontext/notification/service?test
```

For example, if your server is named “myserver”, your User Application is listening on port 8080, and your User Application war file is named “IDMPROV”, the URL would be:

```
http://myserver:8080/IDMPROV/notification/service?test
```

### 22.1.2 Accessing the WSDL

You can access the WSDL for the Notification Web Service using a URL similar to the following:

```
http://server:port/warcontext/notification/service?wsdl
```

For example, if your server is named “myserver”, your User Application is listening on port 8080, and your User Application war file is named “IDMPROV”, the URL would be:

```
http://myserver:8080/IDMPROV/notification/service?wsdl
```

### 22.1.3 Locating the Stub Classes

The stub classes you need for the Notification Web Service are located in the `wsclient.jar`, which ships with the product. This JAR file is located in the `idmuserapp/lib` folder. To allow your code to find the stub classes, you need to add this JAR to your classpath.

## 22.2 Notification Web Service API

This section provides details about the methods available with the Notification Web service. This API presumes you're using Java code generated by the WSSDK toolkit. The API will be different if you're using with another Web Service toolkit.

All of the methods throw `RemoteException`. To improve readability, the `throws` clause has been omitted from the method signatures.

### 22.2.1 iRemoteNotification

This section provides reference information for each method associated with the `iRemoteNotification` interface.

#### **getVersion**

Returns the version number of the notification facility you're running.

**Syntax:** Here is the method signature:

```
VersionVO getVersion()
```

#### **sendNotification**

Sends an e-mail notification.

**Syntax:** Here is the method signature:

```
void sendNotification(NotificationMap arg0)
```

### 22.2.2 BuiltInTokens

This section provides reference information for each method associated with the `BuiltInTokens` class.

#### **BuiltInTokens constructor**

The `BuiltInTokens` class has a single constructor.

**Syntax:** Here is the constructor for the `BuiltInTokens` class:

```
BuiltInTokens()
```

#### **getTO**

Returns the fixed string `TO`, which can be used as a key to identify the value for the `TO` system token.

**Syntax:** Here is the method signature:

```
public java.lang.String getTO()
```

#### **getCC**

Returns the fixed string `CC`, which can be used as a key to identify the value for the `CC` system token.



**Syntax:** Here is the method signature:

```
public java.lang.String getCC()
```

### **getBCC**

Returns the fixed string BCC, which can be used as a key to identify the value for the BCC system token.

**Syntax:** Here is the method signature:

```
public java.lang.String getBCC()
```

### **getTO\_DN**

Returns the fixed string TO\_DN, which can be used as a key to identify the value for the TO\_DN system token.

**Syntax:** Here is the method signature:

```
public java.lang.String getTO_DN()
```

### **getCC\_DN**

Returns the fixed string CC\_DN, which can be used as a key to identify the value for the CC\_DN system token.

**Syntax:** Here is the method signature:

```
public java.lang.String getCC_DN()
```

### **getBCC\_DN**

Returns the fixed string BCC\_DN, which can be used as a key to identify the value for the BCC\_DN system token.

**Syntax:** Here is the method signature:

```
public java.lang.String getBCC_DN()
```

### **getREPLYTO**

Returns the fixed string REPLYTO, which can be used as a key to identify the value for the REPLYTO system token.

**Syntax:** Here is the method signature:

```
public java.lang.String getREPLYTO()
```

### **getREPLYTO\_DN**

Returns the fixed string REPLYTO\_DN, which can be used as a key to identify the value for the REPLYTO\_DN system token.

**Syntax:** Here is the method signature:

```
public java.lang.String getREPLYTO_DN()
```

## **getLOCALE**

Returns the fixed string LOCALE, which can be used as a key to identify the value for the LOCALE system token.

**Syntax:** Here is the method signature:

```
public java.lang.String getLOCALE()
```

## **getNOTIFICATION\_TEMPLATE\_DN**

Returns the fixed string NOTIFICATION\_TEMPLATE, which can be used as a key to identify the value for the NOTIFICATION\_TEMPLATE system token.

**Syntax:** Here is the method signature:

```
public java.lang.String getNOTIFICATION_TEMPLATE_DN()
```

## **22.2.3 Entry**

The Entry class represents an entry in an EntryArray object. It is used to specify a token in an e-mail template.

This section provides reference information for each method associated with the Entry class.

### **Entry constructors**

The Entry class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
Entry()
```

**Syntax 2:** Here is the syntax for a constructor that takes two parameters, the key value and an array of values:

```
Entry(java.lang.String KeyVal, StringArray ValuesVal)
```

### **getKey**

Returns the key defined for the Entry object. The key identifies the token.

**Syntax:** Here is the method signature:

```
java.lang.String getKey()
```

### **setKey**

Sets the key for the Entry object. The key identifies the token. If the object represents a built-in token, you can use the BuiltInTokens class to set the key. Otherwise, you can pass a string to the setKey method that specifies the key.

**Syntax:** Here is the method signature:

```
void setKey(java.lang.String KeyVal)
```

### **getValues**

Returns a StringArray object representing the values for the Entry object.

**Syntax:** Here is the method signature:

```
StringArray getValues()
```

### **setValues**

Sets the values for the Entry object.

**Syntax:** Here is the method signature:

```
void setValues(StringArray ValuesVal)
```

## **22.2.4 EntryArray**

The EntryArray class is a container for an array of Entry objects. It is contained by the NotificationMap object.

This section provides reference information on the methods associated with the EntryArray class.

### **EntryArray constructors**

The EntryArray class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
EntryArray()
```

**Syntax 2:** Here is the syntax for a constructor that takes an array of Entry objects as a parameter:

```
EntryArray(Entry[] EntryVal)
```

### **getEntry**

Returns the Entry object contained within this EntryArray object.

**Syntax:** Here is the method signature:

```
Entry[] getEntry()
```

### **setEntry**

Sets the Entry object for this EntryArray object.

**Syntax:** Here is the method signature:

```
void setEntry(Entry[] EntryVal)
```

## **22.2.5 NotificationMap**

The NotificationMap object is a map that contains an EntryArray object. It is passed to the sendNotification method on the stub.

This section provides reference information for the methods associated with the NotificationMap class.

### **NotificationMap constructors**

The NotificationMap class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
NotificationMap()
```

**Syntax 2:** Here is the syntax for a constructor that takes an `EntryArray` object as a parameter:

```
NotificationMap(EntryArray EntriesVal)
```

### **getEntries**

Returns the `EntryArray` object contained by this `NotificationMap` object.

**Syntax:** Here is the method signature:

```
EntryArray getEntries()
```

### **setEntries**

Sets the `EntryArray` object for this `NotificationMap` object.

**Syntax:** Here is the method signature:

```
void setEntries(EntryArray EntriesVal)
```

## **22.2.6 NotificationService**

This section provides reference information for the `NotificationService` interface.

### **getIRemoteNotificationPort**

Gets the stub for the remote service. The stub is a port of type `IRemoteNotification`.

**Syntax:** Here is the method signature:

```
IRemoteNotification getIRemoteNotificationPort() throws  
javax.xml.rpc.ServiceException
```

## **22.2.7 StringArray**

This section provides reference information for the `StringArray` class.

### **StringArray constructors**

The `StringArray` class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
StringArray()
```

**Syntax 2:** Here is the syntax for a constructor that takes a `String` array as a parameter:

```
StringArray(java.lang.String[] StringVal)
```

### **getString**

Returns the array of strings defined for this `StringArray` object.

**Syntax:** Here is the method signature:

```
java.lang.String[] getString()
```

## setString

Sets the array of strings for this `StringArray` object. This method is called by the second constructor, which takes a `String` array as a parameter.

**Syntax:** Here is the method signature:

```
void setString(java.lang.String[] StringVal)
```

## 22.2.8 VersionVO

This section provides reference information on the `VersionVO` class.

### getValue

Returns the version number of the service.

**Syntax:** Here is the method signature:

```
java.lang.String getValue()
```

## 22.3 Notification Example

The following code example shows how one might use the Notification service to send an e-mail message using a pre-defined system template. To get a reference to the SOAP endpoint for the Notification service, a call is made to the `getNotificationStub()` method. After acquiring the stub interface, the code sets the e-mail notification template as well as values for the built-in tokens in the template. In addition, the code specifies values for the `requestTitle` and `initiatorFullName` tokens. For each token, the code creates an `Entry` object. Once all of the entries have been created, it packages the entry array into a map of type `NotificationMap`, which is then passed to the `sendNotification` method on the stub.

```
import java.util.Properties;

import javax.naming.Context;
import javax.naming.InitialContext;
import javax.xml.rpc.Stub;
import java.rmi.RemoteException;
//
// Notification imports
import com.novell.ws.client.notification.IRemoteNotification;
import com.novell.ws.client.notification.BuiltInTokens;
import com.novell.ws.client.notification.Entry;
import com.novell.ws.client.notification.EntryArray;
import com.novell.ws.client.notification.StringArray;
import com.novell.ws.client.notification.NotificationMap;
import com.novell.ws.client.notification.IRemoteNotification;
import com.novell.ws.client.notification.NotificationService;

public class NotificationTest
{
    private static final int LOCALHOST = 0; // localhost
    private static final int TESTSERVER = 1; // testserver
    private static final int SELECTED_URL = TESTSERVER;
```

```

private String [] SERVER_URLS = {
    "http://localhost:8080/IDMProv/notification/service",
    "http://testserver:8080/IDMProv/notification/service"
};
private String url = SERVER_URLS[SELECTED_URL];
private String username = "cn=admin,ou=idmsample,o=novell";
private String password = "test";

public void emailNotificationTestCase()
throws Exception
{
    System.out.println("\nCalling emailNotificationTestCase() test
case");

    try
    {
        String targetEmailAddress = "jsmith@somewhere.com";
        //
        // Get the notification stub
        IRemoteNotification notificationStub =
getNotificationStub(url, username, password);

        BuiltInTokens builtInTokens = new BuiltInTokens();
        //
        // Set the To: entry
        Entry to = new Entry();
        to.setKey(builtInTokens.getTO());
        StringArray arr = new StringArray(new
String[]{targetEmailAddress} );
        to.setValues(arr);
        //
        // Set which email template to use : list in iManager
(Workflow Admin->Email Templates)
        Entry notificationTemplate = new Entry();

notificationTemplate.setKey(builtInTokens.getNOTIFICATION_TEMPLATE_DN(
));
        //
        // Use one of the email templates specifying DN
        String EMAIL_TEMPLATE_NAME = "Provisioning Notification";
        String templatedDN = "cn=" + EMAIL_TEMPLATE_NAME +
",cn=Default Notification Collection,cn=Security";
        arr = new StringArray(new String[]{templatedDN} );
        notificationTemplate.setValues(arr);
        //
        // Substitute key values defined in email templates
        Entry token1 = new Entry();
        token1.setKey("requestTitle"); // key is %requestTitle%
        arr = new StringArray(new String[]{"Sample Email using
Notification Web Service"} );
        token1.setValues(arr);
        Entry token2 = new Entry();
        token2.setKey("initiatorFullName");

```

```

        arr = new StringArray(new String[]{username} );
        token2.setValues(arr);
        //
        // Setup the notification map
        NotificationMap map = new NotificationMap();
        Entry[] entries = new
Entry[] {to,notificationTemplate,token1,token2};
        EntryArray entryArray = new EntryArray();
        entryArray.setEntry(entries);
        map.setEntries(entryArray);
        //
        // Make the notification endpoint call
        notificationStub.sendNotification(map);
    }
    catch(RemoteException error)
    {
        System.out.println(error.getMessage() );
        throw new Exception(error.getMessage() );
    }
}

/**
 * Method to obtain the remote interface to the Notification
endpoint
 * @param _url
 * @param _username
 * @param _password
 * @return IRemoteNotification interface
 * @throws Exception
 */
private IRemoteNotification getNotificationStub(String _url,
String _username, String _password)
throws Exception
{
    Properties properties = new Properties();
    properties.put(Context.INITIAL_CONTEXT_FACTORY,
"org.jnp.interfaces.NamingContextFactory");

    String lookup =
"xmlrpc:soap:com.novell.ws.client.notification.NotificationService";

    InitialContext ctx = new InitialContext();
    NotificationService svc = (NotificationService)
ctx.lookup(lookup);

    Stub stub = (Stub)svc.getIRemoteNotificationPort();

    stub._setProperty(Stub.USERNAME_PROPERTY, _username);
    stub._setProperty(Stub.PASSWORD_PROPERTY, _password);
    stub._setProperty(Stub.SESSION_MAINTAIN_PROPERTY,
Boolean.TRUE);
    stub._setProperty(Stub.ENDPOINT_ADDRESS_PROPERTY, _url);

```

```
        return (IRemoteNotification) stub;
    }
}
```



# Directory Abstraction Layer (VDX) Web Service

# 23

This section describes the VDX Web Service, which allows SOAP clients to access the directory abstraction layer. Topics include:

- [Section 23.1, “About the Directory Abstraction Layer \(VDX\) Web Service,” on page 477](#)
- [Section 23.2, “VDX Web Service API,” on page 478](#)
- [Section 23.3, “VDX Example,” on page 489](#)

## 23.1 About the Directory Abstraction Layer (VDX) Web Service

The directory abstraction layer provides a logical view of the Identity Vault data. To support access by third-party software applications, the directory abstraction layer includes a Web service endpoint called the VDX Web Service. This endpoint lets you access the attributes associated with entities defined in the directory abstraction layer. It also lets you perform ad hoc searches for entities and execute predefined searches called global queries. You can think of global queries as stored procedures for LDAP.

This Appendix describes the programming interface for the VDX Web Service.

### 23.1.1 Accessing the Test Page

You can access the VDX Web Service endpoint using a URL similar to the following:

```
http://server:port/warcontext/vdx/service?test
```

For example, if your server is named “myserver”, your User Application is listening on port 8080, and your User Application war file is named “IDMPROV”, the URL would be:

```
http://myserver:8080/IDMPROV/vdx/service?test
```

### 23.1.2 Accessing the WSDL

You can access the WSDL for the VDX Web Service using a URL similar to the following:

```
http://server:port/warcontext/vdx/service?wsdl
```

For example, if your server is named “myserver”, your User Application is listening on port 8080, and your User Application war file is named “IDMPROV”, the URL would be:

```
http://myserver:8080/IDMPROV/vdx/service?wsdl
```

### 23.1.3 Locating the Stub Classes

The stub classes you need for the VDX Web Service are located in the wsclient.jar, which ships with the product. This JAR file is located in the idmuserapp/lib folder. To allow your code to find the stub classes, you need to add this JAR to your classpath.

## 23.2 VDX Web Service API

This section provides details about the methods available with the VDX Web service. This API presumes you're using Java code generated by the WSSDK toolkit. The API will be different if you're using with another Web Service toolkit.

All of the methods throw `VdxServiceException`. To improve readability, the throws clause has been omitted from the method signatures.

### 23.2.1 IRemoveVdx

This section provides reference information for each method associated with the `IRemoveVdx` interface.

#### **getVersion**

Returns the version number of the VDX service you're running.

**Syntax:** Here is the method signature:

```
VersionVO getVersion() throws java.rmi.RemoteException;
```

#### **globalQuery**

Allows you to execute predefined searches called global queries. Global queries are saved searches for LDAP. They provide some of the capabilities of stored procedures.

To define a global query, you need to use the directory abstraction layer editor. For details, see the chapter on the directory abstraction layer editor in the *Identity Manager User Application: Design Guide*.

**Syntax:** Here is the method signature:

```
java.lang.String[] globalQuery(java.lang.String queryDN, StringMap  
queryParameterValues) throws VdxServiceException,  
java.rmi.RemoteException;
```

#### **query**

Allows you to perform ad hoc queries by specifying an entity, a set of attributes, and a query expression that filters the data returned.

**Syntax:** Here is the method signature:

```
EntityAttributeMap query(java.lang.String entityDefinition,  
java.lang.String[] attributeKeys, java.lang.String queryFilter) throws  
VdxServiceException, java.rmi.RemoteException;
```

#### **Query Grammar**

The `queryFilter` parameter of the `query()` method lets you pass in search criteria expressions that filter the data returned. This section describes the grammar for these expressions.

**Query syntax 1:** The simplest form of a query is the following:

```
RelationalExpression1
```

**Query syntax 2:** A query can also combine relational expressions with a logical operator:

*RelationalExpression1 logicalOperator RelationalExpression2*

**Query syntax 3:** Alternatively, a query can use parentheses to set off the expressions:

*(RelationalExpression1) logicalOperator (RelationalExpression2)*

**Query syntax 4:** A query can also use parentheses to set off sub queries:

*RelationalExpression1 logicalOperator (RelationalExpression2  
logicalOperator1 RelationalExpression3)*

Relational expressions must be separated by a logical operator which must remain the same. In other words, the following query is valid:

`expression1 AND expression2 AND expression3`

However, this query is not valid:

`expression1 AND expression2 OR expression3`

You can use parentheses to create a condition group, as in the following example:

`expression1 AND (expression2 OR expression3)`

## Grammar for Relational Expressions

**Relational expression syntax:** A relational expression must conform to this syntax:

*attribute relationalOperator value*

## Grammar for Operators and Values

**Relational operators:** The relational operator must be one of the following:

`> , < , >= , <= , = , != , !< , !> , !<= , !>= , STARTWITH, !STARTWITH,  
IN , !IN , PRESENT, !PRESENT`

**Logical operators:** The logical operator must be one of the following:

`AND, OR`

**Value:** The value side of an expression must be one of the following:

`'foo', "foo", 1-9, true, false`

The PRESENT and !PRESENT relational operators require no value.

## getAttribute

Returns a single Attribute object that can be used to retrieve and examine data for an attribute in the directory abstraction layer.

**Syntax:** Here is the method signature:

```
Attribute getAttribute(java.lang.String objectDN, java.lang.String  
entityDefinition, java.lang.String attributeKey) throws  
VdxServiceException, java.rmi.RemoteException;
```

## getAttributes

Returns an array of Attribute objects that can be used to retrieve and examine data in the directory abstraction layer.

**Syntax:** Here is the method signature:

```
Attribute[] getAttributes(java.lang.String objectDN, java.lang.String
entityDefinition, java.lang.String[] attributeKeys) throws
VdxServiceException, java.rmi.RemoteException;
```

## 23.2.2 Attribute

The Attribute class represents an attribute in the directory abstraction layer.

This section provides reference information for the Attribute class.

### Attribute constructors

The Attribute class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no arguments:

```
Attribute()
```

**Syntax 2:** Here is the syntax for a constructor that takes arrays of all the supported data types as arguments:

```
Attribute(ByteArrayArray BinariesVal, BooleanArray BooleansVal,
DateArray DatesVal, IntegerArray IntegersVal, StringArray StringsVal,
AttributeType TypeVal)
```

### getBinaries

Returns the ByteArrayArray object for the attribute.

**Syntax:** Here is the method signature:

```
ByteArrayArray getBinaries()
```

### setBinaries

Sets the ByteArrayArray object for the attribute.

**Syntax:** Here is the method signature:

```
void setBinaries(ByteArrayArray BinariesVal)
```

### getBooleans

Returns the BooleanArray object for the attribute.

**Syntax:** Here is the method signature:

```
BooleanArray getBooleans()
```

### setBooleans

Sets the BooleanArray object for the attribute.

**Syntax:** Here is the method signature:

```
void setBooleans(BooleanArray BooleansVal)
```

### getDates

Returns the DateArray object for the attribute.

**Syntax:** Here is the method signature:

```
DateArray getDates()
```

### **setDates**

Sets the DateArray object for the attribute.

**Syntax:** Here is the method signature:

```
void setDates(DateArray DatesVal)
```

### **getIntegers**

Returns the IntegerArray object for the attribute.

**Syntax:** Here is the method signature:

```
IntegerArray getIntegers()
```

### **setIntegers**

Sets the IntegerArray object for the attribute.

**Syntax:** Here is the method signature:

```
void setIntegers(IntegerArray IntegersVal)
```

### **getStrings**

Returns the StringArray object for the attribute.

**Syntax:** Here is the method signature:

```
StringArray getStrings()
```

### **setStrings**

Set the StringArray object for the attribute.

**Syntax:** Here is the method signature:

```
void setStrings(StringArray StringsVal)
```

### **getType**

Returns the AttributeType object for the attribute.

**Syntax:** Here is the method signature:

```
AttributeType getType()
```

### **setType**

Sets the AttributeType object for the attribute.

**Syntax:** Here is the method signature:

```
void setType(AttributeType TypeVal)
```

## 23.2.3 **AttributeArray**

This section provides reference information on the `AttributeArray` class.

### **AttributeArray constructors**

The `AttributeArray` class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
AttributeArray()
```

**Syntax 2:** Here is the syntax for a constructor that takes an array of `Attribute` objects as a parameter:

```
AttributeArray(Attribute[] AttributeVal)
```

### **getAttribute**

Returns an array of `Attribute` objects.

**Syntax:** Here is the method signature:

```
Attribute[] getAttribute()
```

### **setAttribute**

Sets the array of `Attribute` objects associated with the `AttributeArray` class.

**Syntax:** Here is the method signature:

```
void setAttribute(Attribute[] AttributeVal)
```

## 23.2.4 **AttributeType**

This section provides reference information on the `AttributeType` class.

### **AttributeType constructors**

The `AttributeType` class supports a single constructor.

**Syntax:** Here is the syntax for the constructor:

```
protected AttributeType(java.lang.String value)
```

### **getValue**

Returns a `String` that indicates the attribute type.

**Syntax:** Here is the method signature:

```
java.lang.String getValue()
```

## 23.2.5 **BooleanArray**

This section provides reference information for the `BooleanArray` class.

### **BooleanArray constructors**

The `BooleanArray` class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
BooleanArray()
```

**Syntax 2:** Here is the syntax for a constructor that takes a boolean value as a parameter:

```
BooleanArray(boolean[] BooleanVal)
```

### **getBoolean**

Returns an array of boolean values for an attribute.

**Syntax:** Here is the method signature:

```
boolean[] getBoolean()
```

### **setBoolean**

Sets an array of boolean values for an attribute.

**Syntax:** Here is the method signature:

```
void setBoolean(boolean[] BooleanVal)
```

## **23.2.6 ByteArrayArray**

This section provides reference information on the ByteArrayArray class.

### **ByteArrayArray constructors**

The ByteArrayArray class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
ByteArrayArray()
```

**Syntax 2:** Here is the syntax for a constructor that takes a Base 64 binary value as a parameter:

```
ByteArrayArray(byte[][] Base64BinaryVal)
```

### **getBase64Binary**

Returns a two-dimensional array of bytes for an attribute.

**Syntax:** Here is the method signature:

```
byte[][] getBase64Binary()
```

### **setBase64Binary**

Sets a two-dimensional array of bytes for an attribute.

**Syntax:** Here is the method signature:

```
void setBase64Binary(byte[][] Base64BinaryVal)
```

## **23.2.7 DateArray**

This section provides reference information for the DateArray class.

## DateArray constructors

The DateArray class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
DateArray()
```

**Syntax 2:** Here is the syntax for a constructor that takes a Calendar array as a parameter:

```
DateArray(java.util.Calendar[] DatetimeVal)
```

### getDatetime

Returns an array of Calendar objects for an attribute.

**Syntax:** Here is the method signature:

```
java.util.Calendar[] getDatetime()
```

### setDatetime

Sets an array of Calendar objects for an attribute.

**Syntax:** Here is the method signature:

```
void setDatetime(java.util.Calendar[] DatetimeVal)
```

## 23.2.8 EntryAttributeMap

The EntryAttributeMap class is a container for an EntryArray object. It is returned by the query method on the stub.

This section provides reference information on the methods associated with the EntryAttributeMap class.

### EntryAttributeMap constructors

The EntryAttributeMap class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
EntryAttributeMap()
```

**Syntax 2:** Here is the syntax for a constructor that takes an EntryArray object as a parameter:

```
EntityAttributeMap(EntryArray EntriesVal)
```

### getEntries

Returns the EntryArray object contained within this EntryAttributeMap object.

**Syntax:** Here is the method signature:

```
EntryArray getEntries()
```

### setEntries

Sets the EntryArray object for this EntryAttributeMap object.

**Syntax:** Here is the method signature:



```
void setEntry(EntryArray EntriesVal)
```

## 23.2.9 Entry

The Entry class represents an entry in an EntryArray object.

This section provides reference information for each method associated with the Entry class.

### Entry constructors

The Entry class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
Entry()
```

**Syntax 2:** Here is the syntax for a constructor that takes two parameters, the key value and an array of attribute values:

```
Entry(java.lang.String KeyVal, AttributeArray ValuesVal)
```

### getKey

Returns the key defined for the Entry object. The key identifies the attribute.

**Syntax:** Here is the method signature:

```
java.lang.String getKey()
```

### setKey

Sets the key for the Entry object. The key identifies the attribute.

**Syntax:** Here is the method signature:

```
void setKey(java.lang.String KeyVal)
```

### getValues

Returns a AttributeArray object representing the values for the Entry object.

**Syntax:** Here is the method signature:

```
AttributeArray getValues()
```

### setValues

Sets the values for the Entry object.

**Syntax:** Here is the method signature:

```
void setValues(AttributeArray ValuesVal)
```

## 23.2.10 EntryArray

The EntryArray class is a container for an array of Entry objects. It is contained by the EntryAttributeMap object.

This section provides reference information on the methods associated with the EntryArray class.

## EntryArray constructors

The EntryArray class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
EntryArray()
```

**Syntax 2:** Here is the syntax for a constructor that takes an array of Entry objects as a parameter:

```
EntryArray(Entry[] EntryVal)
```

### getEntry

Returns the Entry object contained within this EntryArray object.

**Syntax:** Here is the method signature:

```
Entry[] getEntry()
```

### setEntry

Sets the Entry object for this EntryArray object.

**Syntax:** Here is the method signature:

```
void setEntry(Entry[] EntryVal)
```

## 23.2.11 IntegerArray

This section provides reference information for the IntegerArray class.

### IntegerArray constructors

The IntegerArray class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
IntegerArray()
```

**Syntax 2:** Here is the syntax for a constructor that takes an int array as a parameter:

```
IntegerArray(int[] IntVal)
```

### getInt

Returns an array of integers for an attribute.

**Syntax:** Here is the method signature:

```
int[] getInt()
```

### setInt

Sets an array of integers for an attribute.

**Syntax:** Here is the method signature:

```
void setInt(int[] IntVal)
```

## 23.2.12 StringArray

The StringArray class is a container for an array of String objects. When you call the query() and getAttributes() methods, you pass in a StringArray object to specify which attributes you want to retrieve values for.

This section provides reference information for the StringArray class.

### StringArray constructors

The StringArray class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
StringArray()
```

**Syntax 2:** Here is the syntax for a constructor that takes an String array as a parameter:

```
StringArray(java.lang.String[] StringVal)
```

### getString

Returns the array of String objects associated with the StringArray object.

**Syntax:** Here is the method signature:

```
java.lang.String[] getString()
```

### setString

Sets the array of String objects associated with the StringArray object.

**Syntax:** Here is the method signature:

```
void setString(java.lang.String[] StringVal)
```

## 23.2.13 StringEntry

The StringEntry class is contained by the the StringEntryArray class.

This section provides reference information for the StringEntry class.

### StringEntry constructors

The StringEntry class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
StringEntry()
```

**Syntax 2:** Here is the syntax for a constructor that takes a key and a String value as parameters:

```
StringEntry(java.lang.String KeyVal, java.lang.String ValuesVal)
```

### getKey

Returns the key defined for the StringEntry object.

**Syntax:** Here is the method signature:

```
java.lang.String getKey()
```

## **setKey**

Sets the key for the `StringEntry` object.

**Syntax:** Here is the method signature:

```
void setKey(java.lang.String KeyVal)
```

## **23.2.14 StringEntryArray**

The `StringEntryArray` class is a container for an array of `StringEntry` objects. It is contained by the `StringMap` object.

This section provides reference information for the `StringEntryArray` class.

### **StringEntryArray constructors**

The `StringEntryArray` class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
StringEntryArray()
```

**Syntax 2:** Here is the syntax for a constructor that takes a `StringEntry` array as a parameter:

```
StringEntryArray(StringEntry[] StringentryVal)
```

### **getStringentry**

Returns the key for the `StringEntryArray` object.

**Syntax:** Here is the method signature:

```
StringEntry[] getStringentry()
```

### **setStringentry**

Sets the key for the `StringEntryArray` object.

**Syntax:** Here is the method signature:

```
void setStringentry(StringEntry[] StringentryVal)
```

## **23.2.15 StringMap**

The `StringMap` is a container for a `StringEntryArray` object.

This section provides reference information on the `StringMap` class.

### **StringMap constructors**

The `StringMap` class has two constructors.

**Syntax 1:** Here is the syntax for a constructor that takes no parameters:

```
StringMap()
```

**Syntax 2:** Here is the syntax for a constructor that takes a `StringEntryArray` as a parameter:

```
StringMap(StringEntryArray EntriesVal)
```

## **getEntries**

Returns the StringEntryArray object contained by this StringMap object.

**Syntax:** Here is the method signature:

```
StringEntryArray getEntries()
```

## **setEntries**

Sets the StringEntryArray object for this StringMap object.

**Syntax:** Here is the method signature:

```
void setEntries(StringEntryArray EntriesVal)
```

## **23.2.16 VdxService**

This section provides reference information for the VdxService interface.

### **getIRemoteVdxPort**

Gets the stub for the remote service. The stub is a port of type IRemoteVdx.

**Syntax:** Here is the method signature:

```
IRemoteVdx getIRemoteVdxPort() throws javax.xml.rpc.ServiceException;
```

## **23.2.17 VersionVO**

This section provides reference information on the VersionVO class.

### **getValue**

Returns the version number of the service.

**Syntax:** Here is the method signature:

```
java.lang.String getValue()
```

## **23.3 VDX Example**

The following code example shows how one might use the VDX service to access the attributes associated with entities defined in the directory abstraction layer. It demonstrates the use of ad hoc searches, as well as predefined searches called global queries. This code listing includes examples that use the `getAttribute()`, `getAttributes()`, `query()`, and `globalQuery()` methods on the service.

To get a reference to the SOAP endpoint for the VDX service, it calls a method called `getVdxStub()`. The implementation for this method is shown at the end of the listing:

```
import java.util.Properties;

import javax.naming.Context;
import javax.naming.InitialContext;
import javax.xml.rpc.Stub;
import java.rmi.RemoteException;
import java.io.File;
import java.io.FileNotFoundException;
```

```

import java.io.FileOutputStream;
import java.io.IOException;
import java.rmi.RemoteException;
import java.util.Calendar;
import java.util.Date;
import java.util.Hashtable;
import java.util.Map;
//
// Vdx imports
import com.novell.ws.client.vdx.IRemoteVdx;
import com.novell.ws.client.vdx.VdxService;
import com.novell.ws.client.vdx.VdxServiceException;
import com.novell.ws.client.vdx.VersionVO;
import com.novell.ws.client.vdx.Attribute;
import com.novell.ws.client.vdx.AttributeArray;
import com.novell.ws.client.vdx.AttributeType;
import com.novell.ws.client.vdx.ByteArrayArray;
import com.novell.ws.client.vdx.BooleanArray;
import com.novell.ws.client.vdx.DateArray;
import com.novell.ws.client.vdx.StringArray;
import com.novell.ws.client.vdx.IntegerArray;
import com.novell.ws.client.vdx.EntryArray;
import com.novell.ws.client.vdx.Entry;
import com.novell.ws.client.vdx.EntityAttributeMap;

public class ServiceTest
{
    public static final int VDX          = 0;
    public static final int NOTIFICATION = 1;
    public static final int RESOURCE     = 2;
    public static final int ENDPOINT_SERVICE = VDX;

    private static final int LOCALHOST = 0; // localhost
    private static final int TESTSERVER = 1; // testserver
    private static final int SELECTED_URL = TESTSERVER;

    private String [] SERVER_URLS = {
        "http://localhost:8080/IDMProv/vdx/service",
        "http://testserver:8080/IDMProv/vdx/service"
    };

    private String url = SERVER_URLS[SELECTED_URL];
    private String username = "cn=admin,ou=idmsample,o=novell";
    private String password = "test";

    private String [] userAttributes = {
        // "passwordAllowChange", // boolean
        "UserPhoto", // binary
        // "loginTime", // time
        "Department", // string
        "Title",
        "Email",
        "manager", // dn = string
    };

```

```

        "TelephoneNumber",
        "directReports",
        "FirstName",
        //"surname",
        "group",
        "srvprvHideAttributes",
        "NotificationPrefs",
        "srvprvQueryList",
        "Location",
    };

public ServiceTest() { };

public static void main(String [] args)
{
    ServiceTest serviceTest = new ServiceTest();
    //
    // Set default if no params are given
    int wService = ENDPOINT_SERVICE;
    if(args.length == 1)
        wService = Integer.parseInt(args[0]);

    try
    {
        serviceTest.run(wService);
    }
    catch(Exception e)
    {
        System.exit(-1);
    }
}

private void waitHere(long _time) { try { Thread.sleep(_time *
1000); } catch(InterruptedException ie) {} }

public void run(int _service)
throws Exception
{
    if(_service == VDX)
    {
        System.out.println("Calling VDX endpoint");
        //
        // Get the version number
        getVersionTestCase();
        waitHere(2);
        //
        // Get attribute data for entity user
        getAttributeTestCase();
        waitHere(2);
        //
        // Get attributes
        getAttributesTestCase();
    }
}

```

```

        waitHere(2);
        //
        // Query attributes
        queryAttributesTestCase();
        waitHere(2);
        //
        // Global query
        // Global query MUST be associated with a defined and
deployed query.
        // This can be done via the Designer.

        globalQueryTestCase();
    }
    else if(_service == NOTIFICATION)
    {
        System.out.println("Calling Notification endpoint");
        NotificationTest notificationTest = new
NotificationTest();
        //
        // Email Notification
        notificationTest.emailNotificationTestCase();
    }
    else if(_service == RESOURCE)
    {
        System.out.println("Calling Resource endpoint");
    }
    else
    {
        System.out.println("Unrecognized service selection");
    }
}

public void globalQueryTestCase()
    throws Exception
    {
        System.out.println("\n<=====queryAttributesTestCase=====>");
        try
        {
            //
            // Get the vdx stub
            IRemoteVdx vdxStub = getVdxStub(url, username, password);
            //
            // Create entry items corresponding to param key in DAL
            StringEntry [] entry = {
                new StringEntry("titleattribute", "Chief Operating
Officer"),
                new StringEntry("managerattribute",
"cn=jmiller,ou=users,ou=idmsample-pproto,o=novell")
            };
            //
            // Create and set the array of entries (key,value pairs)
            StringEntryArray entryArr = new StringEntryArray();

```



```

        entryArr.setStringentry(entry);
        //
        // Create and set the map using the entries
        StringMap map = new StringMap();
        map.setEntries(entryArr);
        //
        // Define and execute the global query
        int QUERY_KEY_INDEX = 0;
        String [] queryKeyName = {"TestVdxGlobalQuery2",
"TestVdxGlobalQuery"};
        //
        // Results from global query TestVdxGlobalQuery2 ----->
cn=apalani,ou=users,OU=idmsample-pproto,O=novell
        //
        // Make the vdx endpoint call
        StringArray array =
vdxStub.globalQuery(queryKeyName[QUERY_KEY_INDEX], map);
        String [] str = array.getString();
        if(str == null)
            throw new Exception("Global query returns null for key
name " + queryKeyName);
        else
        {
            System.out.println("Results for global query : " +
queryKeyName[QUERY_KEY_INDEX]);

System.out.println("=====
====");
            for(int index = 0; index < str.length; index++)
            {
                System.out.println(str[index]);
            }
        }
    }
    catch(VdxServiceException error)
    {
        System.out.println(error.getReason() );
        throw new Exception(error.getReason() );
    }
    catch(RemoteException error)
    {
        System.out.println(error.getMessage() );
        throw new Exception(error.getMessage() );
    }
}

public void queryAttributesTestCase()
throws Exception
{
    System.out.println("\nCalling queryAttributesTestCase() test
case");
    try
    {

```

```

    IRemoteVdx vdxStub = getVdxStub(url, username, password);

    StringArray attributes = new StringArray();
    attributes.setString(new String[]{"FirstName", "Title",
"UserPhoto", "Department"});
    String expression1 = "FirstName STARTWITH 'J'";
    String expression2 = "Title = 'Controller'";
    String expression3 = "vdxInteger > 0";
    String expression4 = "TelephoneNumber != '(555) 555-1201'";
    //
    // Test Cases
    // expression1 --> Should yield all users whose firstname
starts with J
    // expression1 AND expression2 --> Should yield jkelley who
is the Controller
    // expression1 AND expression3 --> Should yield only jmiller
    // expression1 AND expression4 --> Should yield all users
starting with J EXCEPT jmiller
    String finalExpression = expression1 + " AND " +
expression2;
    //
    // Make the vdx endpoint call
    EntityAttributeMap map = vdxStub.query("user", attributes,
finalExpression);
    EntryArray entryArray = map.getEntries();
    Entry [] entries = entryArray.getEntry();
    if(entries != null)
    {
        for(int index = 0; index < entries.length; index++)
        {
            String dnKey = entries[index].getKey();
            System.out.println("DN Key = " + dnKey);
            AttributeArray attributeArray =
entries[index].getValues();
            Attribute [] attributeData =
attributeArray.getAttribute();
            for(int attrIndex = 0; attrIndex <
attributeData.length; attrIndex++)
            {
                //
                // Determine how to handle the return data
                examineAttributeData(attributeData[attrIndex],
" ");
            }
        }
    }
}
catch(VdxServiceException error)
{
    System.out.println(error.getReason() );
    throw new Exception(error.getReason() );
}
catch(RemoteException error)

```

```

        {
            System.out.println(error.getMessage() );
            throw new Exception(error.getMessage() );
        }
    }

    public void getVersionTestCase()
    throws Exception
    {
        System.out.println("\nCalling getVersionTestCase() test
case");

        try
        {
            IRemoteVdx vdxStub = getVdxStub(url, username, password);
            VersionVO version = vdxStub.getVersion();
            System.out.println("Version : " + version.getValue() );
        }
        catch(RemoteException error)
        {
            System.out.println(error.getMessage() );
            throw new Exception(error.getMessage() );
        }
    }

    public void getAttributeTestCase()
    throws Exception
    {
        System.out.println("\nCalling getAttributeTestCase() test
case");

        try
        {
            IRemoteVdx vdxStub = getVdxStub(url, username, password);

            String recipient =
"cn=jmiller,ou=users,ou=idmsample,o=novell";
            String entity = "user";
            for(int attributeIndex = 0; attributeIndex <
userAttributes.length; attributeIndex++)
            {
                //
                // Now, get the values for each attribute from the VDX
layer
                Attribute attributeData =
vdxStub.getAttribute(recipient,
                    entity, userAttributes[attributeIndex]);
                //
                // Determine how to handle the return data
                examineAttributeData(attributeData,
userAttributes[attributeIndex]);
            }
        }
    }

```

```

    }
    catch(VdxServiceException error)
    {
        System.out.println(error.getReason() );
        throw new Exception(error.getReason() );
    }
    catch(RemoteException error)
    {
        System.out.println(error.getMessage() );
        throw new Exception(error.getMessage() );
    }
}

public void getAttributesTestCase()
throws Exception
{
    System.out.println("\nCalling getAttributesTestCase() test
case");

    try
    {
        IRemoteVdx vdxStub = getVdxStub(url, username, password);

        String recipient =
"cn=jmiller,ou=users,ou=idmsample,o=novell";
        String entity = "user";
        StringArray userAttributesArray = new
StringArray(userAttributes);
        AttributeArray attributeArray =
vdxStub.getAttributes(recipient,
            entity, userAttributesArray);
        Attribute [] attributeData = attributeArray.getAttribute();
        for(int index = 0; index < attributeData.length; index++)
        {
            //
            // Determine how to handle the return data
            examineAttributeData(attributeData[index],
userAttributes[index]);
        }
    }
    catch(VdxServiceException error)
    {
        System.out.println(error.getReason() );
        throw new Exception(error.getReason() );
    }
    catch(RemoteException error)
    {
        System.out.println(error.getMessage() );
        throw new Exception(error.getMessage() );
    }
}

private void examineAttributeData(Attribute _attribute, String

```

```

_attributeName)
    throws Exception
    {
        AttributeType type = _attribute.getType();
        System.out.println("Attribute type : " + type);
        //
        // What type are we dealing with?
        if(type.getValue().compareTo(AttributeType._Integer) == 0)
        {
            IntegerArray intArray = _attribute.getIntegers();
            int [] intData = intArray.getInt();
            if(intData == null)
                System.out.println(_attributeName + " attribute : " +
"null because no attribute value exists.");
            else
            {
                for(int intIndex = 0; intIndex < intData.length;
intIndex++)
                {
                    System.out.println(_attributeName + " attribute : "
+ intData[intIndex]);
                }
            }
        }
        else if(type.getValue().compareTo(AttributeType._Boolean) == 0)
        {
            BooleanArray boolArray = _attribute.getBooleans();
            boolean [] booleanData = boolArray.getBoolean();
            if(booleanData == null)
                System.out.println(_attributeName + " attribute : " +
"null because no attribute value exists.");
            else
            {
                for(int boolIndex = 0; boolIndex < booleanData.length;
boolIndex++)
                {
                    System.out.println(_attributeName + " attribute : "
+ booleanData[boolIndex]);
                }
            }
        }
        else if( (type.getValue().compareTo(AttributeType._String) ==
0) ||
                (type.getValue().compareTo(AttributeType._DN) == 0) )
        {
            StringArray dataArray = _attribute.getStrings();
            String [] stringData = dataArray.getString();
            if(stringData == null)
                System.out.println(_attributeName + " attribute : " +
"null because no attribute value exists.");
            else
            {
                for(int strIndex = 0; strIndex < stringData.length;
strIndex++)

```

```

        {
            System.out.println(_attributeName + " attribute : "
+ stringData[strIndex]);
        }
    }
}
else if(type.getValue().compareTo(AttributeType._Binary) == 0)
{
    ByteArrayArray byteArray = _attribute.getBinaries();
    byte [][] byteData = byteArray.getBase64Binary();
    if(byteData == null)
        System.out.println(_attributeName + " attribute : " +
"null because no attribute value exists.");
    else
    {
        for(int byteIndex = 0; byteIndex < byteData.length;
byteIndex++)
        {
            byte [] data = byteData[byteIndex];
            //
            // Save the data to a gif file and view it to
            // make sure the binary return data is correct.
            try
            {
                File fileObj = new File("C:\\temp\\photo.gif");
                if(fileObj.exists())
                    fileObj.delete();
                FileOutputStream fout = new
FileOutputStream(fileObj);
                fout.write(data);
                fout.flush();
            }
            catch(FileNotFoundException fne)
            {
                throw new Exception(fne.getMessage());
            }
            catch(IOException ioe)
            {
                throw new Exception(ioe.getMessage());
            }
        }
    }
}
else if(type.getValue().compareTo(AttributeType._Time) == 0)
{
    DateArray dateArray = _attribute.getDates();
    Calendar [] calendar = dateArray.getDatetime();
    if(calendar == null)
        System.out.println(_attributeName + " attribute : " +
"null because no attribute value exists.");
    else
    {
        for(int calIndex = 0; calIndex < calendar.length;
calIndex++)

```

```

        {
            System.out.println(_attributeName + " attribute : "
+ calendar[calIndex].getTime().toString());
        }
    }
}

/**
 * Method to obtain the remote interface to the Vdx endpoint
 * @param _url
 * @param _username
 * @param _password
 * @return IRemoteMetrics interface
 * @throws Exception
 */
private IRemoteVdx getVdxStub(String _url, String _username, String
_password)
    throws Exception
{
    Properties properties = new Properties();
    properties.put(Context.INITIAL_CONTEXT_FACTORY,
"org.jnp.interfaces.NamingContextFactory");

    String lookup =
"xmlrpc:soap:com.novell.ws.client.vdx.VdxService";

    InitialContext ctx = new InitialContext();
    VdxService svc = (VdxService) ctx.lookup(lookup);

    Stub stub = (Stub)svc.getIRemoteVdxPort();

    stub._setProperty(Stub.USERNAME_PROPERTY, _username);
    stub._setProperty(Stub.PASSWORD_PROPERTY, _password);
    stub._setProperty(Stub.SESSION_MAINTAIN_PROPERTY,
Boolean.TRUE);
    stub._setProperty(Stub.ENDPOINT_ADDRESS_PROPERTY, _url);

    return (IRemoteVdx) stub;
}
}

```





# Appendixes

# VII

The following sections provide additional reference information and advanced topics for the Identity Manager user application.

- ♦ [Appendix A, “Schema Extensions for the User Application,” on page 503](#)
- ♦ [Appendix B, “JavaScript Search API,” on page 509](#)
- ♦ [Appendix C, “Trouble Shooting,” on page 519](#)



# Schema Extensions for the User Application

This section describes the schema extensions used by the User Application. It includes these sections:

- ♦ [Section A.1, “Attribute Schema Extensions,” on page 503.](#)
- ♦ [Section A.2, “Objectclass Schema Extensions,” on page 505.](#)

## A.1 Attribute Schema Extensions

Attribute Name	Description
srvprvAllowMgrInitiate	A flag that indicates if the manager is allowed to initiate a provisioning request.
srvprvAllowMgrRetract	A flag to indicate if the manager is allowed to retract a provisioning request.
srvprvAllowMgrSetAvailability	A flag that indicates whether the manager can set a proxy for the team.
srvprvAllowMgrSetDelegate	A flag to indicate if the manager is allowed to set delegates for a provisioning request.
srvprvAllowMgrSetProxy	A flag to indicate if the manager is allowed to set a team proxy.
srvprvAllowMgrTaskClaim	A flag to indicate if the manager is allowed to claim a provisioning approval task.
srvprvAllowMgrTaskReassign	A flag to indicate if the manager is allowed to reassign a provisioning approval task.
srvprvAllRequests	A flag to indicate if the assignment covers all provisioning request definitions for a team.
srvprvAOLIMAddress	AOL IM address.
srvprvAssetRef	Representation of the aggregate asset properties for a named asset associated to a user via the <code>srvprvAssetRecipientAux</code> class.
srvprvAssignExpiration	Time at which a proxy or delegate assignment expires.
srvprvAssignFromContainer	Container subjects of a proxy or delegate assignment.
srvprvAssignFromGroup	Group subjects of a proxy or delegate assignment.
srvprvAssignFromUser	User subjects of a proxy or delegate assignment.
srvprvAssignStartTime	Time at which a delegation assignment takes effect.
srvprvAssignToRelationship	A target relationship of a delegate assignment.
srvprvAssignToUser	The User targets of a proxy or delegate assignment.

Attribute Name	Description
srvprvAutoDisplayTeam	Automatically display team members.
srvprvCapabilities1-5	Listing of skills for a user.
srvprvCategoryKey	Associates a given Provisioning Request Definition to a set of provisioning categories. Values are keys to a srvprvChoice instance.
srvprvCurrentDelegates	The delegations associated with a user.
srvprvCurrentDelegators	The delegations associated with a user.
srvprvDefaultTheme	The default theme.
srvprvDelegateeDef	The delegates definition DN.
srvprvDelegationDef	The delegation definition DN.
srvprvDelegators	The users who are defined as delegators by this assignment.
srvprvEntitlementRef	Reference to a DirXML-Entitlement.
srvprvEntityType	Specifies Directory Abstraction Layer Entity definition type.
srvprvFlowStrategy	Specifies the flow invocation strategy to be used for the Provisioning Request Definition.
srvprvGrant	Flag which if true specifies that the Provisioning Request Definition supports a Grant operation.
srvprvGroupwiseIMAddress	Groupwise IM address.
srvprvHideAttributes	Flag indicating if certain attributes should be hidden and not displayed.
srvprvHideUser	Flag indicating if the user should be hidden when search list queries are executed.
srvprvIMAddress	Instant Messenger address.
srvprvIsTaskManager	Indicates if user is a task group manager.
srvprvLocalizedDescrs	Provides set of localized description strings for the provisioning web applications, Designers and iManager.
srvprvLocalizedNames	Provides set of localized display name strings for the provisioning web applications, Designers and iManager.
srvprvManager	Indicates users who are managers.
srvprvManagerGroup	Indicates a group containing managers.
srvprvManagerNotMember	Indicates that the manager is not a member of the team.
srvprvMember	Indicates users who are team members.
srvprvMemberContainer	The name of the container containing team members.
srvprvMemberGroup	The name of the group containing team members.
srvprvMemberRelationship	The name of the directory abstraction layer relationship that determines members based attribute in manager object.

Attribute Name	Description
srvprvModified	Flag to indicate changes to definitions object instances in the directory model container.
srvprvNotificationPrefs	Defines the set of notification types users want to receive.
srvprvPreferredLocale	Users preferred locale.
srvprvProcessXML	XML document representing a Provisioning process definition including Workflow and Provisioning Action.
srvprvQueryList	List of saved query/search criteria.
srvprvRelationship	Defines relationships between objects in the identity vault.
srvprvRequest	Exposes one item to be granted or revoked, including the workflow process which defines the run-time aspects of the Workflow and Provisioning Target.
srvprvRequestDefName	The provisioning request definition name associated with a delegate definition.
srvprvRequestScope	The scope of provisioning requests.
srvprvRequestXML	XML document representing the initial request form and its data bindings.
srvprvRevoke	If true, this flag specifies that the Provisioning Request Definition supports a Revoke operation.
srvprvStatus	Specifies the status of the Provisioning Object Supported values.
srvprvTaskGroups	Groups for which the user is a task manager.
srvprvTaskManager	Task manager of the task group.
srvprvTaskScopeAddressee	The addressee's task scope.
srvprvTaskScopeRecipient	The recipient's task scope.
srvprvTeam	The container for team definitions.
srvprvUser	The users associated with a delegation assignment.
srvprvUUID	Unique identifier for portlet.
srvprvYahooIMAddress	Yahoo* IM address.

## A.2 Objectclass Schema Extensions

Objectclass Name	Description
srvprvAppConfig	Container for application configuration objects of the Provisioning System to which its DirXML-Driver parent connects.
srvprvAppDefs	Container for configuration objects used to initialize the Provisioning run-time environment, such as themes for the Identity Portal.

<b>Objectclass Name</b>	<b>Description</b>
srvprvAssetRecipientAux	Records the provisioning of non-IT assets on a user.
srvprvChoice	Enumeration of values that can be assigned to a particular attribute, used in a query, for use in the Identity Portlets and other Web Application components.
srvprvChoiceDefs	Container for Directory Abstraction Layer Choice definitions, to be exposed by the Identity Portlets and Web Applications.
srvprvDelegateeAssignment	Delegates assignment definition.
srvprvDelegateeDefs	Container for delegates definitions.
srvprvDelegationAssignment	Delegation or availability assignment definition.
srvprvDelegationDefs	Container for delegation and delegators definitions.
srvprvDelegatorAssignment	Delegation or availability assignment definition.
srvprvDirectoryModel	Container for Directory Abstraction Layer meta-level objects, selected contents of the directory to be exposed by the Identity Portlets and Web Applications.
srvprvDirectoryModelConfig	Runtime Directory Abstraction Layer configuration parameters.
srvprvEntity	Defines a view of selected attributes for defined classes in the directory, used by the Identity Portlets and other Web Application components.
srvprvEntityAux	Standard ObjectClass.
srvprvEntityDefs	Container for Directory Abstraction Layer Entity definitions, to be exposed by the Identity Portlets and Web Applications.
srvprvProxyAssignment	Proxy assignment definition.
srvprvProxyDefs	Container for proxy definitions.
srvprvQuery	Directory abstraction layer query definition.
srvprvQueryDefs	Container for directory abstraction layer query definition.
srvprvRelationship	Defines relationships between objects in the directory, for use in the Identity Portlets and other Web Application components.
srvprvRelationshipDefs	Container for Directory Abstraction Layer Relationship definitions, to be exposed by the Identity Portlets and Web Applications.
srvprvRequest	Exposes one item to be granted or revoked, including the workflow process which defines the run-time aspects of the Workflow and Provisioning Target.
srvprvRequestDefs	Container for Provisioning Request Definitions, the set of items to the Web Application run-time.
srvprvResource	Defines the set of directory assignments to execute for a provisioning fulfillment operation (either Grant or Revoke).
srvprvResourceDefs	Container for Provisioning Target definitions, including design-time descriptions plus any template or unused targets.

<b>Objectclass Name</b>	<b>Description</b>
srvprvService	Describes how to invoke a specific Web Service from an Workflow This includes specification of input and return values.
srvprvServiceDefs	Container for Service Definition objects, which wrap Web Services called by Workflows.
srvprvTaskGroupAux	Service provisioning task group.
srvprvTeam	Team for provisioning request management.
srvprvTeamDefs	Container for team definitions.
srvprvTeamRequest	Team provisioning requests.
srvprvTheme	Theme Object.
srvprvUserAux	Service provisioning user entity.
srvprvWebAppConfig	Web Application configuration object.
srvprvWorkflow	Defines the network of activities including traversal conditions to be executed in order to obtain approval for a provisioning action.
srvprvWorkflowDefs	Container for Workflow objects, including design-time descriptions plus any template or unused flows.





# JavaScript Search API

The underlying framework for the Identity Manager User Application supports a JavaScript API for executing searches that access the Directory Abstraction Layer. This API lets you build, save, and execute queries from a JSP page running outside of the User Application itself. To run a query, you can invoke the services of the SearchListPortlet, passing parameters that specify the search criteria and formatting options. Alternatively, you can run a search by using the API directly without involving the SearchListPortlet.

This document covers the following topics:

- ◆ [Section B.1, “Launching a Basic Search using the SearchListPortlet,” on page 509](#)
- ◆ [Section B.2, “Creating a New Query using the JavaScript API,” on page 513](#)
- ◆ [Section B.3, “Performing an Advanced Search Using a JSON-formatted Query,” on page 516](#)
- ◆ [Section B.4, “Retrieving all Saved Queries for the Current User,” on page 517](#)
- ◆ [Section B.5, “Running an Existing Saved Query,” on page 517](#)
- ◆ [Section B.6, “Performing a Search on All Searchable Attributes,” on page 518](#)

## B.1 Launching a Basic Search using the SearchListPortlet

To perform a basic search, you can specify a *deep link* to the SearchListPortlet from a JSP page. The URL for the portlet must either pass a simple set of request parameters that specify the search criteria, or pass a JSON-formatted query string. A basic search defines a single search criterion, such as the following:

```
First Name starts with A
```

To launch a search, you can call the single portlet render url for the SearchListPortlet. You must pass the request parameter `MODE=MODE_RESULTS_LIST`

### B.1.1 Passing Request Parameters

You can pass a simple set of request parameters to the SearchListPortlet. These parameters specify an entity, an attribute to search on, an operator, and a search string. The following script shows the URL for the portlet, as well as the four request parameters you need to use:

```
<script type="text/javascript">
function openSearchResults(extraUrlParams) {
    var url = "/IDMProv/portal/portlet/SearchListPortlet?";
    url += "urlType=Render&novl-regid=SearchListPortlet";
    url += "&novl-inst=IDMProv.SearchListPortlet";
    url += "&wsrp-mode=view&wsrp-windowstate=normal";
    url += "&MODE=MODE_RESULTS_LIST&";
    url += extraUrlParams;
    var feat = "width=700,height=600";
    feat += ",menubar=no,resizable=yes,toolbar=no,scrollbars=yes";
}
```

```

    var win = window.open(url, "TestSearchPopup", feat);
    if (win) win.focus();
}

var search1a = "ENTITY_DEF=user";
search1a += "&COND_ROW_ATTR=FirstName";
search1a += "&COND_ROW_REL_OP=starts-with";
search1a += "&COND_ROW_VAL=A";
...

```

To call this function, you might have a button on the form with onclick event that looks like this:

```

<input type="button" value="GO" onclick="openSearchResults(search1a)"/>

```

The following table describes the request parameters:

**Table B-1** Request Parameters for Basic Search

Request Parameter	Description
ENTITY_DEF	Specifies an entity in the Directory Abstraction Layer.
COND_ROW_ATTR	Specifies the attribute to search on.

Request Parameter	Description
COND_ROW_REL_OP	<p>Specifies the operator to use in the search expression. The following operators are supported for attributes of type string, boolean, integer, time, dn_lookup, dynamic_list, and static_list:</p> <p>equals present not_equals not_present</p> <p>The following operators are supported for attributes of type string:</p> <p>starts_with ends_with contains not_starts_with not_ends_with not_contains</p> <p>The following operators are supported for attributes of type integer and time:</p> <p>greater greater_or_equal less less_or_equal not_greater not_greater_or_equal not_less not_less_or_equal</p>
COND_ROW_VAL	The value to search on.

## B.1.2 Using a JSON-formatted String to Represent a Query

If you prefer to format your query as a JSON string, you need to pass the `QUERY` parameter to the `SearchListPortlet`, instead of the request parameters described in the section above. The JavaScript variable shown below illustrates how the `QUERY` parameter is constructed:

```
var search1b ='QUERY={"k":"Lastname starts with B","mxPg":"10",';
search1b +='"mxRes":"0","ptr":"1","grp":[{"map":{"row":[{"map":{"';
search1b +='"rowRop":"starts-with","rowVal":"B","rowAttr":"LastName"';
search1b +='}}],"rowLop":"and"}}],';
search1b +='"orderBy":"LastName","entDef":"user",';
search1b +='"sScope":"","sRoot":"","grpLop":"and",';
search1b +='"selAttr":["FirstName","LastName",';
search1b +='"Title","Email","TelephoneNumber"]}';
```

The JSON structure gives you a way to specify values for most of the settings and preferences associated with the `SearchListPortlet`.

The following table describes the JSON name/value pairs that define the QUERY parameter passed to the SearchListPortlet:

**Table B-2** *JSON Structure for Defining the QUERY Parameter*

JSON Setting	Description
k	Specifies a name for the search. (Optional)
mxPg	Specifies the maximum number of rows per page. (Optional)
mxRes	Specifies the maximum number of total rows retrieved. (Optional)
ptr	Sets the scroll pointer, which defines the pagination offset. (Optional)
grp	Defines a condition group. You can specify one or more condition groups. For details on the settings for a condition group, see <a href="#">Table B-3 on page 512</a> .
orderBy	Specifies the attribute to sort on. (Optional)
entDef	Specifies an entity in the Directory Abstraction Layer.
sScope	Sets the search scope. (Optional)
sRoot	Sets the search root. (Optional)
grpLop	Defines the logical operator ( <code>and</code> or <code>or</code> ) for groups within this query.
selAttr	Lists the attributes to include in the search results.

The following table describes the JSON structure for defining a condition group:

**Table B-3** *JSON Structure for Defining a Condition Group*

JSON Setting	Description
row	Defines a condition row. You can specify one or more condition rows. For details on the settings for a condition row, see <a href="#">Table B-4 on page 513</a> .
rowLop	Defines the logical operator ( <code>and</code> or <code>or</code> ) for rows within this group.

The following table describes the JSON structure for defining a condition row:

**Table B-4** JSON Structure for Defining the Fields for a Condition Row

JSON Setting	Description
rowRop	Defines the relational operator. The relational operators supported in JSON are the same as those for basic searches using request parameters. For a complete list of the relational operators, see the description of COND_ROW_REL_OP in <a href="#">Table B-1 on page 510</a> .
rowVal	Sets the search value.
rowAttr	Specifies the attribute to search on.

## B.2 Creating a New Query using the JavaScript API

As an alternative to using the basic search request parameters, or the JSON structure, you can call a JavaScript API to execute queries. This section describes some simple techniques for using the API, as well as reference documentation for the API.

The search API relies on the ajax framework embedded in the User Application component named JUICE. JUICE (JavaScript UI Controls and Extensions) is compliant with and uses the dojo library. JUICE is merged into the dojo release used in the User Application.

Therefore, to use JUICE on a custom page within the IDM User Application WAR file, you need to have a script reference to dojo.js (not to JUICE). After adding the reference to dojo.js, you can add a JavaScript line to tell dojo to download JUICE.

Before using the JavaScript API, you need to perform some setup steps on the page to make the dojo module available for use:

- 1 Add a script tag for dojo.js in the HTML header. The reference to dojo.js must be in the header (not the body), as shown below.

```
<html>
<head>
<META http-equiv="Content-Type" content="text/html; charset=UTF-
8">
<title>JavaScript Search</title>
<script type="text/javascript">
  if(typeof dojo=="undefined"){
    var djConfig={isDebug: false,
                  baseScriptUri: "/IDMProv/javascript/dojo/"};
    var buf="<script type='text\\javascript' ";
    buf+="src='/IDMProv/UIQuery?js=dojo\\dojo.js'><\\script>";
    document.writeln(buf);
  }
</script>
</head>
```

- 2 Add this JavaScript statement to load JUICE into the browser's memory:

```
<script type="text/javascript">
  //This line must precede any code using JUICE.
```

```

    dojo.require("JUICE.*");
</script>

```

**3** To take advantage of the JUICE.IDM services, which include entity searching, also add this JavaScript statement:

```

<script type="text/javascript">
    //This line must precede any code using JUICE.IDM services.
    dojo.require("JUICE.IDM.*");
</script>

```

To build the query, you need to call the create() method on the JUICE.IDM.Entities.Search object, passing in the name you want to give to the query. The create() method is a static method. Here's how you invoke it:

```
var newQuery = JUICE.IDM.Entities.Search.create("My New Search");
```

Once you've created the query object, you can call methods on this object to define the basic settings for the query, as well as the condition groups and condition rows. The query structure you create with the JavaScript API follows the model of the JSON representation. After you've created the query object you append it to the QUERY request parameter.

The JavaScript example shown below illustrates how you use the JavaScript API to build a query:

```

function buildQuery3() {
    var newQuery = JUICE.IDM.Entities.Search.create("My New Search");
    newQuery.setFrom("user");
    var selAttrs = ["FirstName", "LastName"];
    newQuery.setSelects(selAttrs);
    var newCondGrp1 = newQuery.addConditionGroup();
    var newCondRow1_1 = newCondGrp1.addConditionRow();
    newCondRow1_1.setRowAttr("FirstName");
    newCondRow1_1.setRowRop("contains");
    newCondRow1_1.setRowVal("C");
    openSearchResults("QUERY=" + newQuery);
}

```

## B.2.1 JavaScript API

This section provides reference documentation for the JavaScript API for searching entities in the Directory Abstraction Layer.

The following table describes the static methods for the JUICE.IDM.Entities.Search object:

**Table B-5** *Static methods for JUICE.IDM.Entities.Search*

Method	Description
<Query> create(searchName)	Creates a new Query with the searchName
<void> load(uuid)	Loads a user's saved search with the uuid
<Query> get(uuid)	Returns the user's saved search with uuid as a Query
<String[]> getNames()	Returns the names of all the logged in user's saved searches

Method	Description
<String> getUUID(searchName)	Returns the uuid of the saved search with the searchName

The following table describes the methods for the Query object:

**Table B-6** *Methods for the Query object*

Method	Description
<void> setKey(searchName)	Sets the searchName
<void> setFrom(defKey)	Sets the from entity-definition
<void> setSelects(attrKey[])	Sets the selects (optional, if using SearchListPortlet)
<void> setSearchScope(scop)	Sets the search scope (optional)
<void> setSearchRoot(rt)	Sets the search root (optional)
<void> setMaxPage(int)	Sets the max rows per page (optional)
<void> setMaxResults(int)	Sets the max rows in total (optional)
<void> setOrderBy(attrKey)	Sets the sort (optional)
<void> setPointer(int)	Sets the pagination offset (optional)
<void> setGroupLop(lop)	Sets the inter-group logical operator
<String> getKey()	Gets the searchName
<String> getFrom()	Gets the from entity-definition
<String> getSelects()	Gets the selects
<String> getSearchScope()	Gets the search scope
<String> getSearchRoot()	Gets the search root
<int> getMaxPage()	Gets the max rows per page
<int> getMaxResults()	Gets the max rows in total
<String> getOrderBy()	Gets the sort
<int> getPointer()	Gets the pagination offset
<String> getGroupLop()	Gets the inter-group logical operator
<int> nbConditionGroups	Returns the number of condition groups
<CondGroup> addConditionGroup	Creates and returns a new condition group (CondGroup object) appended to the query
<void> removeConditonGroup(i)	Removes the condition group at i
<CondGroup> getConditonGroup(i)	Returns the condition group at i

The following table describes the methods for the CondGroup object:

**Table B-7** *Methods for the CondGroup object*

Method	Description
<void> setRowLop(lop)	Sets the intra-group logical operator
<String> getRowLop()	Gets the intra-group logical operator
<int> nbConditionRows()	Returns the number of condition rows
<CondRow> addConditionRow()	Creates and returns a new condition row appended to the condition group
<void> removeConditionRow(i)	Removes the condition row at i
<CondRow> getConditionRow(i)	Returns the condition row at i

The following table describes the methods for the CondRow object:

**Table B-8** *Methods for the CondRow object*

Method	Description
<void> setRowAttr(attrKey)	Sets the attribute
<void> setRowRop(rop)	Sets the relational operator.
<void> setRowVal(val)	Sets the search value
<String> getRowAttr()	Gets the attribute
<String> getRowRop()	Gets the relational operator
<String> getRowVal()	Gets the search value

## B.3 Performing an Advanced Search Using a JSON-formatted Query

You can use the QUERY parameter to perform an advanced search using JSON. The JSON syntax rules are the same as those for the basic search. The only difference is that an advanced search typically defines multiple condition groups and condition rows. The JavaScript variable shown below illustrates how the QUERY parameter might be constructed for a search that uses several condition groups and condition rows:

```
var search2 = 'QUERY={"k":"Complicated Search All  
OK", "mxPg":"10", "mxRes":"0", "ptr":"1", "grp":[{"map":{"row":[{"map":{"r  
owRop":"equals", "rowVal":"cn=bg1, ou=groups, ou=idmsample, o=novell", "row  
Attr":"group"}}, {"map":{"rowRop":"contains", "rowVal":"0", "rowAttr":"Fi  
rstName"}}, {"map":{"rowRop":"not-  
present", "rowVal":""," "rowAttr":"TelephoneNumber"}}, {"map":{"rowRop":"e  
quals", "rowVal":"cn=ablake, ou=users, ou=idmsample, o=novell", "rowAttr":"  
directReports"}}, {"map":{"rowRop":"equals", "rowVal":"cn=cnano, ou=users  
, ou=idmsample, o=novell", "rowAttr":"manager"}}, {"map":{"rowRop":"not-  
present", "rowVal":""," "rowAttr":"TelephoneNumber"}}, {"map":{"rowRop":"e  
quals", "rowVal":"cn=ablake, ou=users, ou=idmsample, o=novell", "rowAttr":"
```



```
directReports"}}, {"map": {"rowRop": "equals", "rowVal": "cn=cnano, ou=users
, ou=idmsample, o=novell", "rowAttr": "manager"}}, {"rowLop": "and"}}, {"orde
rBy": "LastName", "entDef": "user", "sScope": "", "sRoot": "", "grpLop": "or", "
selAttr": ["FirstName", "Title", "Email", "TelephoneNumber"]}';
```

For details on each of the JSON settings, see [Section B.1.2, “Using a JSON-formatted String to Represent a Query,”](#) on page 511.

## B.4 Retrieving all Saved Queries for the Current User

You can use the JavaScript API to retrieve all saved queries for the user who is currently logged on. To do this, you need to call the `getNames()` static method on the `JUICE.IDM.Entities.Search` object.

The following JavaScript example illustrates the procedure for retrieving all saved queries for the current user:

```
function query4GetSavedQueries() {
    var searchNames = JUICE.IDM.Entities.Search.getNames();
    var replaceDiv = document.getElementById("savedQueryNames");
    replaceDiv.innerHTML = searchNames;
}
```

## B.5 Running an Existing Saved Query

You can use the JavaScript API to execute a saved query. Before you execute a saved query, you need to perform the following JavaScript statement to retrieve the saved queries (as described in the previous section):

```
JUICE.IDM.Entities.Search.getNames();
```

You need to call `getNames()` first, even if you know the name of the saved search you want to run.

After calling the `getNames()` function, you need to perform these steps to execute the saved search:

- 1 Call the `getUUID()` method to access the UUID associated with the search name.
- 2 Call the `load()` method on the `JUICE.IDM.Entities.Search` object to load the saved query with the UUID.
- 3 Call the `get()` method to retrieve the saved query structure.

All of these methods are static methods.

Once you have the query structure, you can use it to construct a `QUERY` request parameter.

The following JavaScript example illustrates the procedure for launching a saved query:

```
function runQuery4() {
    var textField = document.getElementById("savedQueryToRun");
    var queryName = textField.value;
    var queryUUID = JUICE.IDM.Entities.Search.getUUID(queryName);
    JUICE.IDM.Entities.Search.load(queryUUID);
    var myQuery = JUICE.IDM.Entities.Search.get(queryUUID);

    openSearchResults("QUERY=" + myQuery);
}
```

## B.6 Performing a Search on All Searchable Attributes

You can use the JavaScript API to search all of the searchable attributes for an entity. This type of search only applies to attributes that have a type of string. Therefore, it does not work with DN, date, integer, boolean, and so forth.

To perform a search on all searchable attributes, you create a query object in the same manner that you would using other search techniques (as described above). Then you need to get the list of attributes for an entity definition by calling `JUICE.IDM.Definition.load()`. Once you have the list of attributes, you need to verify that each attribute is a string and is searchable. For each attribute that is a string and is searchable, you can now add a condition row by calling the `addConditionRow()` method on the condition group object. When all condition rows have been added, you can execute the search.

The following JavaScript example illustrates how to perform a search on all searchable attributes.

```
function buildQuery5() {
    var searchStr = document.getElementById("query5Text").value;
    if (searchStr == "") {
        alert("Enter a search string in the text field.");
        return;
    }
    var newQuery = JUICE.IDM.Entities.Search.create("My New Search");
    var entDef = "user";
    newQuery.setFrom(entDef);
    var selAttrs = new Array();
    selAttrs.push("FirstName");
    selAttrs.push("LastName");
    newQuery.setSelects(selAttrs);
    var newCondGrp1 = newQuery.addConditionGroup();
    newCondGrp1.setRowLop("or");

    //get all the searchable attributes of entity-definition user that
    //are type string (excludes DN, date, integer, boolean, etc)
    JUICE.IDM.Definitions.load(entDef);
    var attrKeys = JUICE.IDM.Definitions.getAttributeKeys(entDef);
    for (var i = 0; i < attrKeys.length; i++) {
        var attrDef = JUICE.IDM.Definitions.getAttribute(entDef,
attrKeys[i]);
        var attrType = attrDef.getType();
        var searchable = attrDef.isSearchable();

        if (attrType == "String" && searchable) {
            var newCondRow = newCondGrp1.addConditionRow();
            newCondRow.setRowAttr(attrKeys[i]);
            newCondRow.setRowRop("contains");
            newCondRow.setRowVal(searchStr);
        }
    }
    openSearchResults("QUERY=" + newQuery);
}
```

# Trouble Shooting

This section describes tips for working around common errors. It includes:

- ♦ [Section C.1, “Permgen Space Error,” on page 519](#)
- ♦ [Section C.2, “E-Mail Notification Templates,” on page 519](#)
- ♦ [Section C.3, “Org Chart and Guest Access,” on page 519](#)
- ♦ [Section C.4, “Provisioning Notification,” on page 520](#)

## C.1 Permgen Space Error

You might encounter the following error when you redeploy the User Application:

```
11:32:20,194 ERROR [[PortalAggregator]] Servlet.service() for servlet PortalAggregator threw exception java.lang.OutOfMemoryError: PermGen space
```

To avoid this error, either:

- ♦ Restart the JBoss server.

or

- ♦ Or, increase the PermSpace value by passing `-XX:MaxPermSize` to the Java virtual machine by means of `JAVA_OPTS` in the `start-jboss` script, for example:  
`-XX:MaxpermSize=128m`

## C.2 E-Mail Notification Templates

If your e-mail notification templates are displaying in a single language and not in the user’s default locale as you expect, check to see what notification template is selected. You can select a default template or a localized version of the template. When you select a localized template, the language of the localized template is used regardless of the user’s default language. When you select the default template (the template without a locale code), the e-mail is in the user’s default language (if the default is a supported language).

## C.3 Org Chart and Guest Access

If you encounter an error like this at runtime, then you must modify the service definitions in the User Application WAR:

```
error: "an error occurred Control instantiation of JUICE.OrgChartCtrl failed (Object doesn't support this property or method). Please contact your system administrator. Detailed information can be found in the console." when accessing the portlet in a browser.
```

To learn more about fixing this message, see [Section 13.3, “Configuring Org Chart for Guest Access,” on page 264](#).

## C.4 Provisioning Notification

If the *Notify Other Users of these Changes* check box does not display on the following Requests & Approvals pages:

- ◆ Edit Availability
- ◆ My Proxy Assignments
- ◆ My Delegate Assignments
- ◆ Team Proxy Assignments
- ◆ Team Delegate Assignments
- ◆ Team Availability

Verify that Email Notification templates have been defined. You define them through the *Administration > Provisioning > Delegation, Proxy and Tasks*.