Customizing Oracle Identity Manager

Customizing Oracle Identity Manager

Distribution

Product Administrator or System Administrator for Oracle Identity Manager 11*g* R2 PS1

Overview

The Identity Self Service user interface (UI) in Oracle Identity Manager is based on Application Development Framework (ADF), which ensures consistent customization. ADF allows UI customization that is safe from patches and upgrades. This means that after you apply patches to Oracle Identity Manager or upgrade Oracle Identity Manager, the UI customizations are preserved.

UI customizations and personalizations are performed using the Web Composer, which runs in the browser, eliminating the need for additional development environments. Customizations, after they are published, take effect for all users, and can be performed only by administrators with the requisite authorization. Personalization can be performed by any user and changes made by a user do not affect any other user.

In this tutorial, you will:

- Rebrand the Identity Self Service Console
- Use the Web Composer to modify a button label
- Use the Web Composer to hide UI components, such as fields on a page
- Add a custom user attribute, modify pages to include the attribute, and define a policy to display the attribute only to users assigned to specific roles
- Personalize the Home Page of the Identity Self Service Console
- Personalize search results by creating and saving custom search filters
- Rename panel text for the Identity Self Service Console
- Organize, rename, and hide menus for the Identity Self Service Console
- Add a user defined field (UDFs) to a page on the Identity Self Service Console
- Add the UDF to a search page

Assumptions

- You installed, configured, and launched Oracle Identity Manager 11gR2 PS1.

- You downloaded the `example-corp-logo.png` file to your machine. This file contains the logo for Example Corp, the company associated with this tutorial.

- You created records for the Finance organization and HR Manager role in Oracle Identity Manager.

- You created user records for Clarence Saladna, Dorelia Bratten, Kenny Vesterdal, Nancey Jepson, Portia Bradshaw, Rosalia Teerdhala, Trudy Auerbach, and Teena Semmens, and assigned these users to the Finance organization.

- You assigned Teena Semmens to be the manager of Charles Saladna.

- You assigned the HR Manager role to Teena Semmens.

- You created two directories on your machine: `/sandboxes/first` and `/sandboxes/second`. For this tutorial, both directories are nested within the `/home/oracle` directory.

Rebranding the Identity Self Service Console

Overview

In this topic, you rebrand the Identity Self Service Console by changing the logo and text on the header. This involves:

- Copying a new image file to the deployment directory
- Using the Web Composer to modify the Identity Self Service Console

Tasks

1. Copy the `example-corp-logo.png` file to the `/u01/app/Oracle/Middleware/Oracle_IDM1/server/apps/oim.ear/ xlWebApp.war/images` folder.
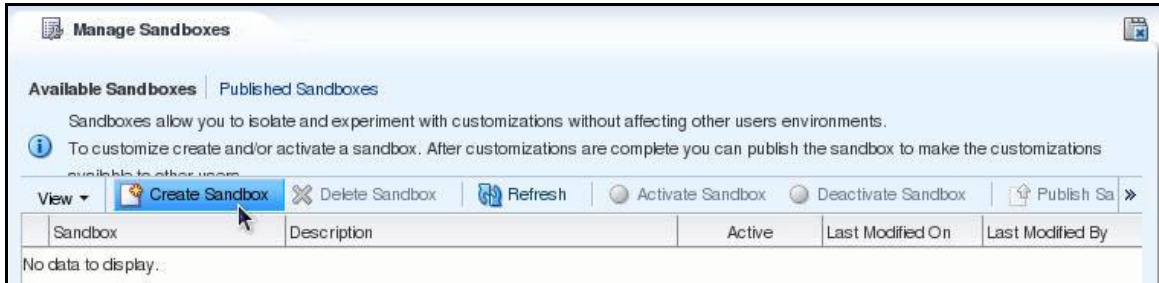
   Note: For this tutorial, `/u01/app/Oracle/Middleware/Oracle_IDM1` is the home directory for Oracle Identity Manager.

2. Sign in to the Identity Self Service Console as the `xelsysadm` user.

3. Click the Sandboxes link (located in the upper-right-hand corner of the console).
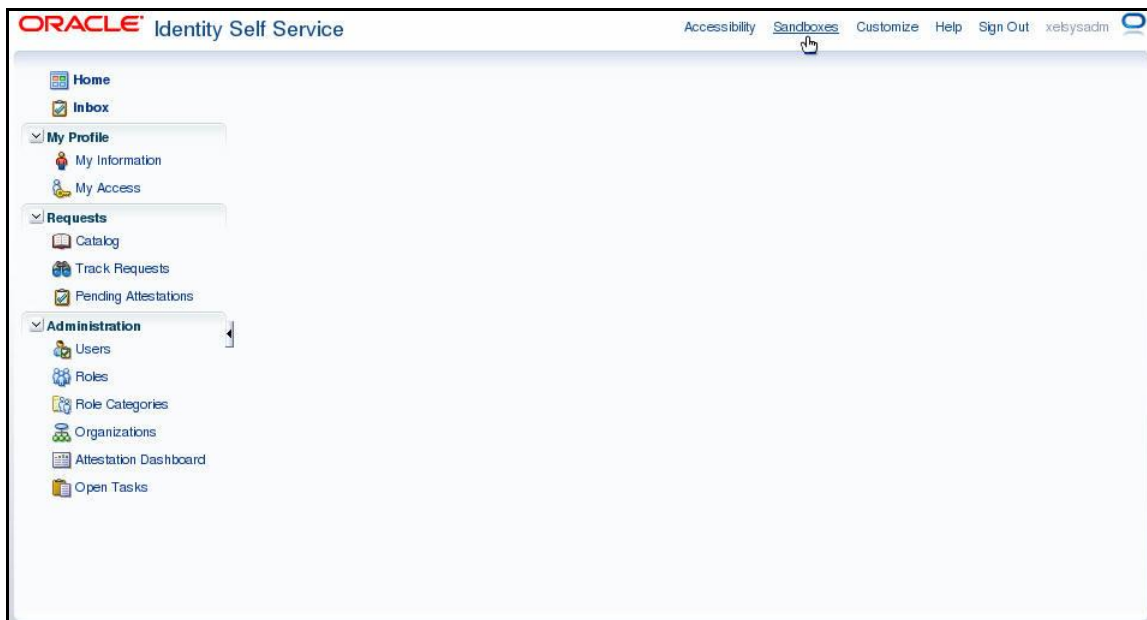
   Note: You click the Sandboxes link because all Oracle Identity Manager customizations must be created in a sandbox.

4. On the Manage Sandboxes tab, click Create Sandbox.

Manage Sandboxes					
Available Sandboxes	Published Sandboxes				
Sandboxes allow you to isolate and experiment with customizations without affecting other users environments.					
ⓘ To customize create and/or activate a sandbox. After customizations are complete you can publish the sandbox to make the customizations available to other users.					
View ▾	🗋 Create Sandbox	✖ Delete Sandbox	🔄 Refresh	○ Activate Sandbox	○ Deactivate Sandbox	⬆ Publish Sa »
Sandbox	Description		Active	Last Modified On	Last Modified By
No data to display.					

5. In the Create Sandbox window, enter `Example_Corp` in the Sandbox Name field. Make sure that the Activate Sandbox check box is selected. Click Save and Close.

Create Sandbox ✖

* Sandbox Name | Example_Corp
Sandbox Description |
Activate Sandbox ☑
Save and Close   Cancel
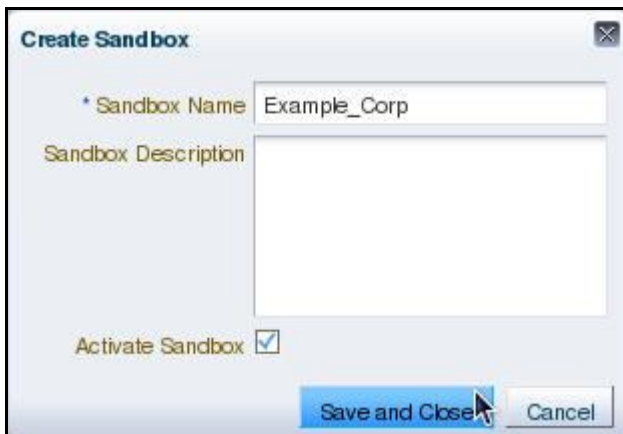
Note: You provide Example_Corp for the name of the sandbox because Oracle Identity Manager does not allow you to use spaces for sandbox names.

6. On the Confirmation dialog box, click OK.

Create Sandbox ✖
🗋 Confirmation
Sandbox Example_Corp was created using label Creation_IdM_Example_Corp_01:29:06.
OK

Note: The name of the Sandboxes link changes to Sandboxes (Example_Corp). This signifies that you created and activated a sandbox.

7. Click the Customize link (located in the upper-right-hand corner of the console).

The Oracle Web Composer opens. The top of the page shows "Editing Page: Identity Self Service."

8. Select Source from the View drop-down menu.
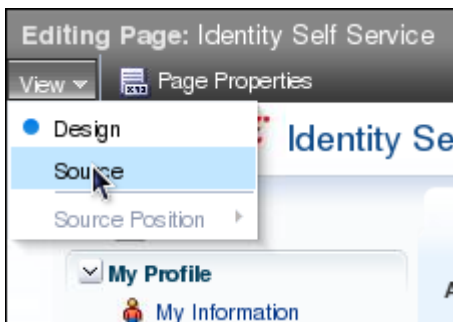
The component layout is displayed.
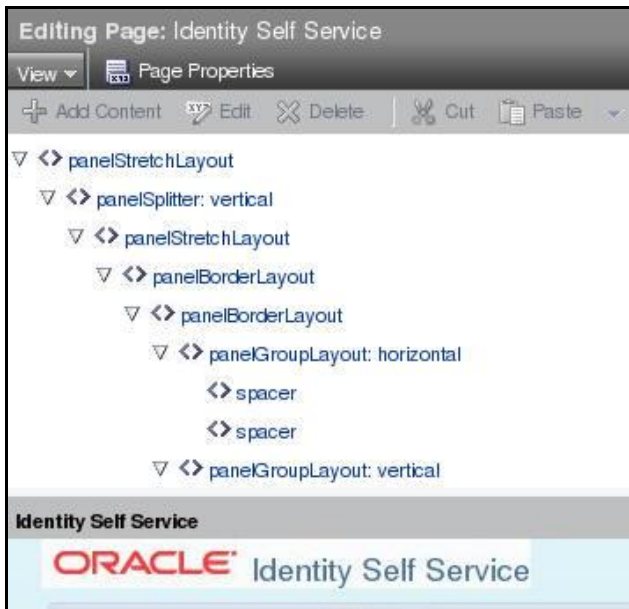
9. Click on the region that you wish to change. This selects the component for editing in the Web Composer. You want to change the header text "Identity Self Service," so click on the header text.

The corresponding component is selected for editing in the Web Composer.
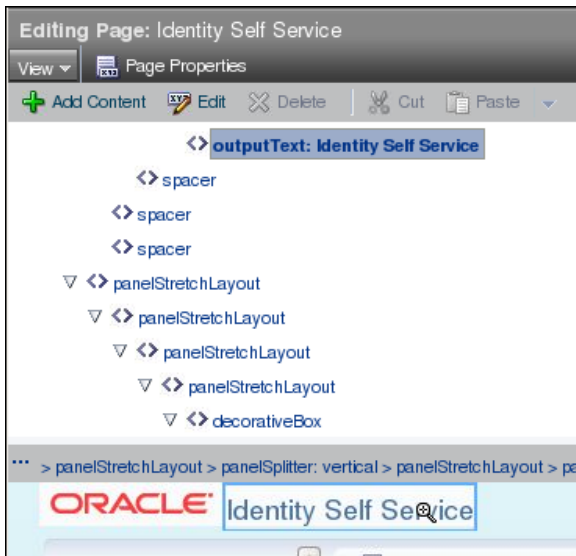
10. Click Edit.
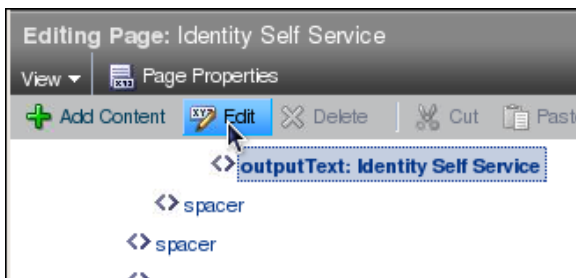
The Component Properties window is displayed.

Customizing Oracle Identity Manager

11. Click the down arrow next to the Value text area and select Expression Builder.
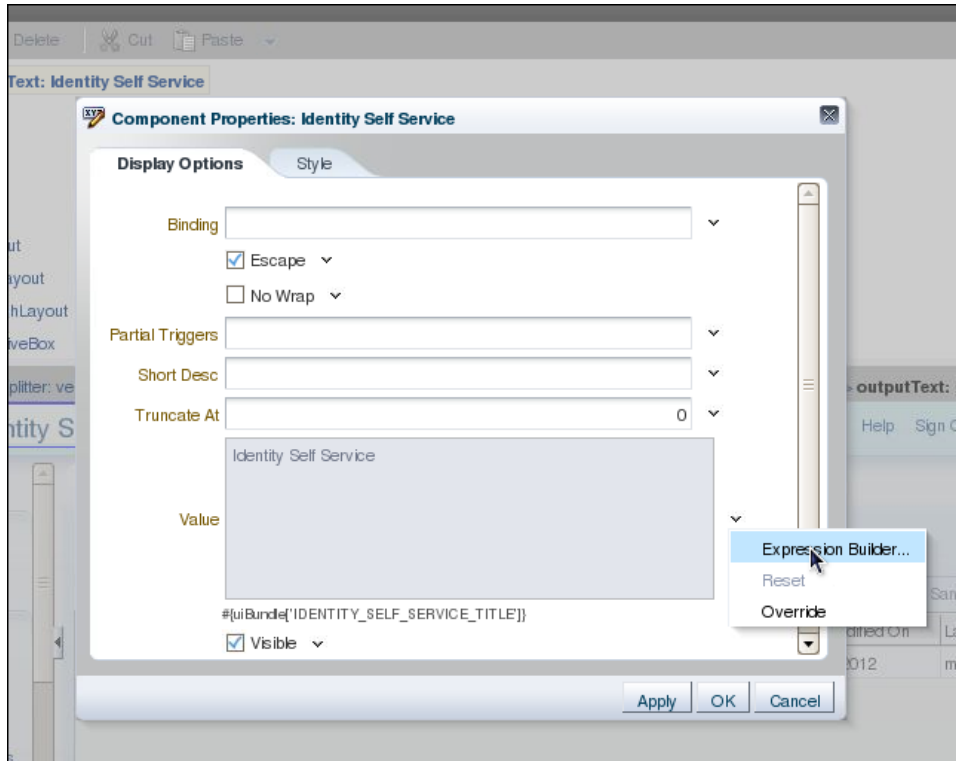
12. Change the value in the text area from

```
#{uiBundle['IDENTITY_SELF_SERVICE_TITLE']}
```

to

```
Self Service Application
```

and click OK.
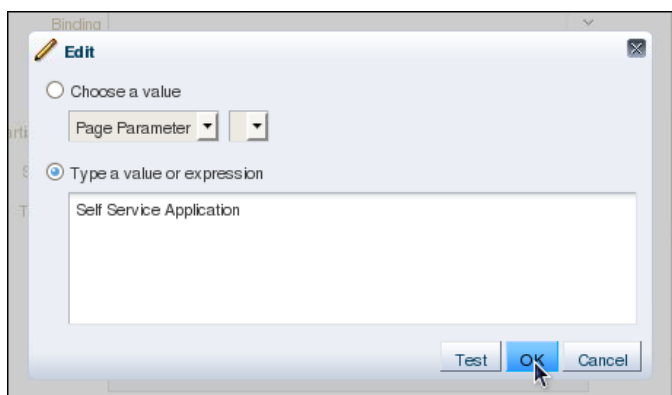
The Value text area in the Component Properties window is updated with the text Self Service Application.

13. Click OK.
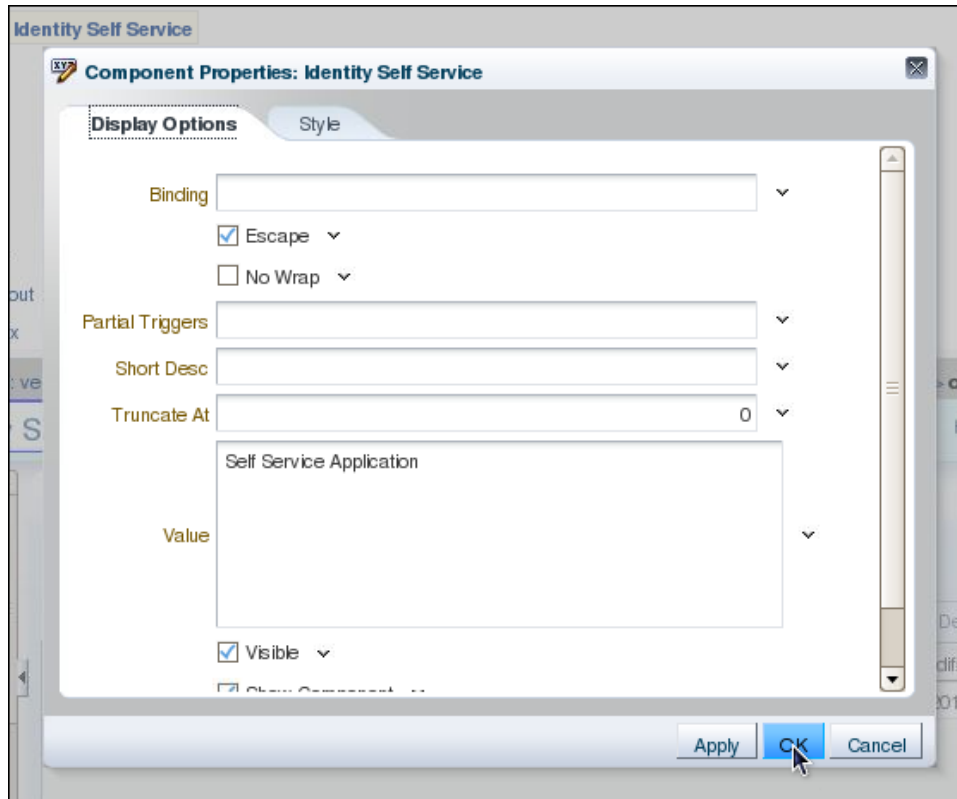
The Component Properties window closes and the header text is updated.

You have modified the header text. Next, you modify the logo on the header.

14. Click the Oracle logo to select it for editing.

15. Click Edit.
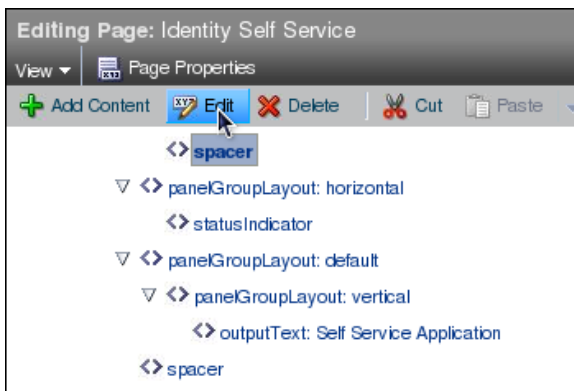
16. Change the text in the Short Desc field from `Oracle` to `Example Corp`.
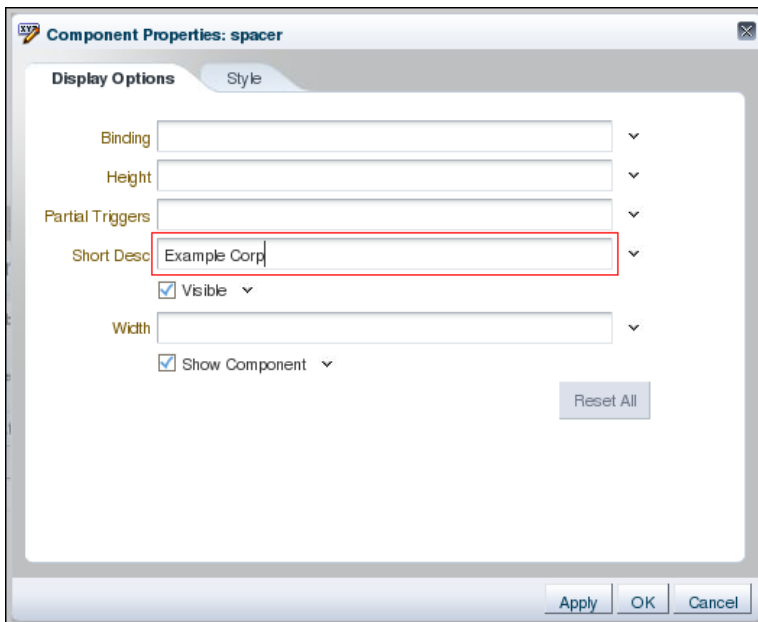
Note: This changes the tool tip text that is displayed when the cursor is moved over the image.

17. Click the Style tab of the Component Properties window.
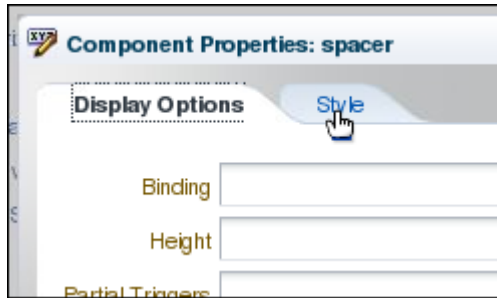
18. Enter the text `url(/xlWebApp/images/example-corp-logo.png)` in the Background Image field and click OK.

The logo is updated.

Customizing Oracle Identity Manager
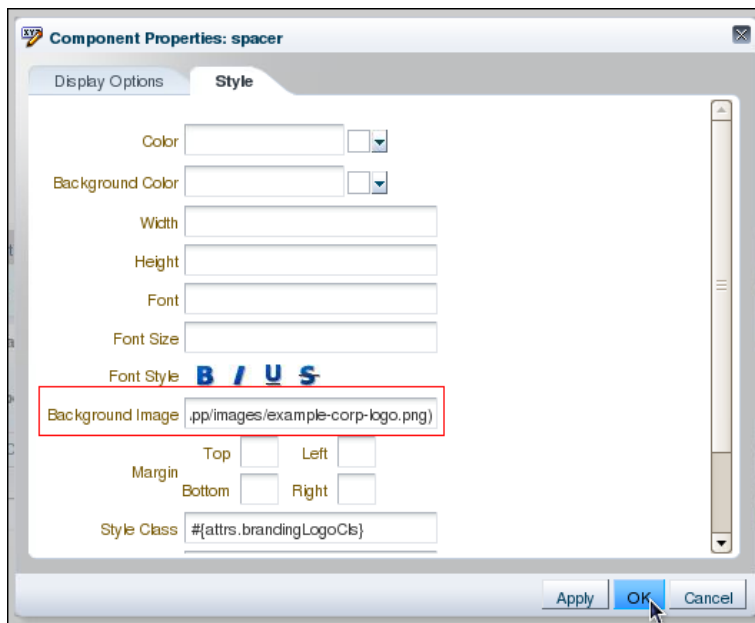
19. Click Close to close the Web Composer.

20. Move the cursor over the Example Corp logo. Note that the tool tip is now Example Corp.

21. Publish the sandbox to make it active for all users. Highlight the sandbox you created in this procedure (Example_Corp). Click Publish Sandbox.

22. On the Confirmation dialog box, click OK.
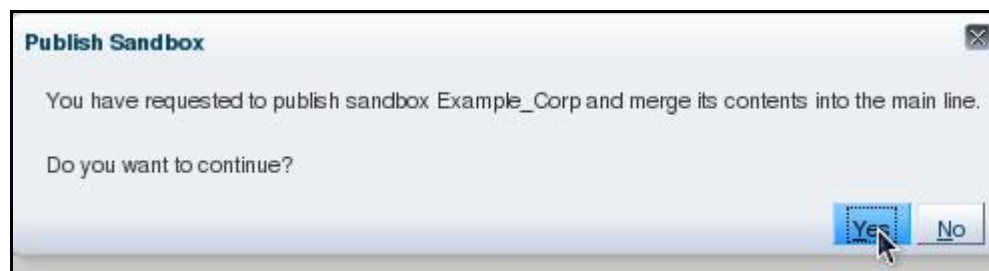
Note: The name of the Sandboxes link reverts back to its original name (Sandboxes). This signifies that you published the sandbox.

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23. Repeat step 20 of this procedure to verify that the change you made to the mouseover text is merged into the main line.
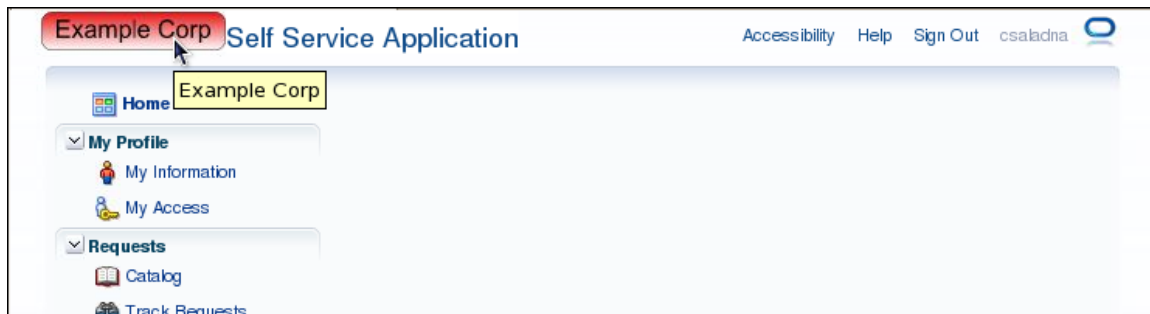
24. Sign out of the Identity Self Service Console.

You have updated the logo and the header text, and changed the tool tip text for the logo.

Note: These steps only re-brand the Identity Self Service Console. To re-brand the System Administration Console, the same steps must be followed while you are signed in to the System Administration Console.

Customizing Oracle Identity Manager

Modifying a Button Label

Overview

In this topic, you use the Web Composer to change the label on the Submit button on the Modify User page to Apply.

Tasks

1. Sign in to the Identity Self Service Console as the `xelsysadm` user.

2. Create and activate a sandbox called `Example_Corp_2`.

3. Click Users under Administration.

4. Search for and click the link for a user in Oracle Identity Manager. For this example, search for the user named Clarence Saladna (`CSALADNA`).
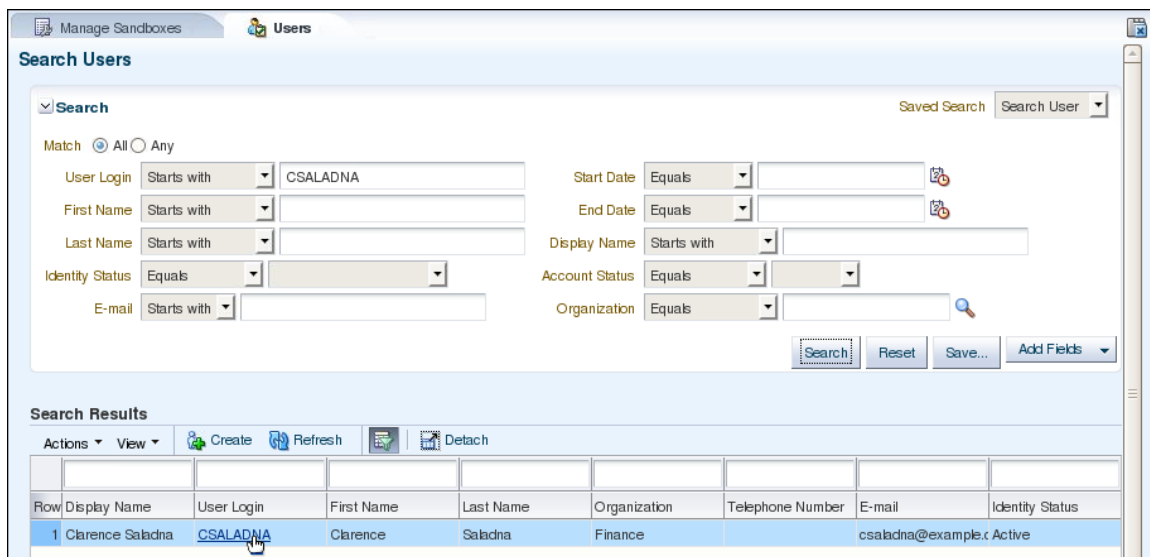
5. Click Modify User.
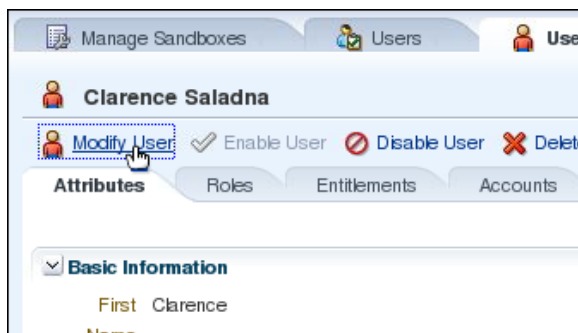
A new tab "Modify User : CSALADNA" is displayed.

Customizing Oracle Identity Manager

6. Click the Customize link to open the Web Composer.

7. Select Source from the View drop-down menu.

8. Click the Submit button to select it for editing in the Web Composer.
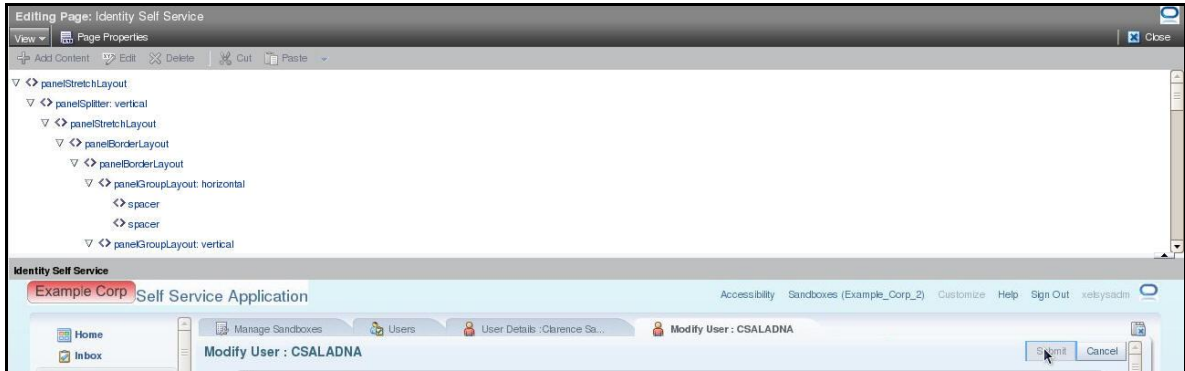
9. Click Edit to confirm editing of the task flow.
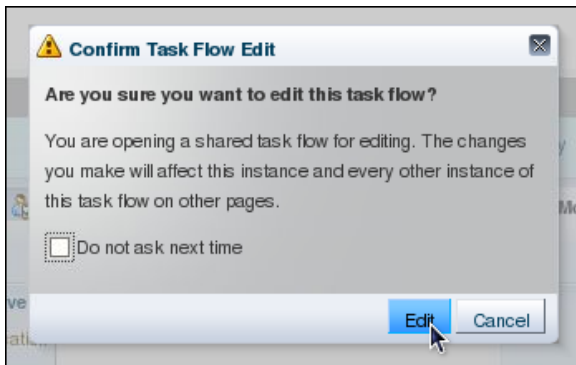
10. Click Edit.
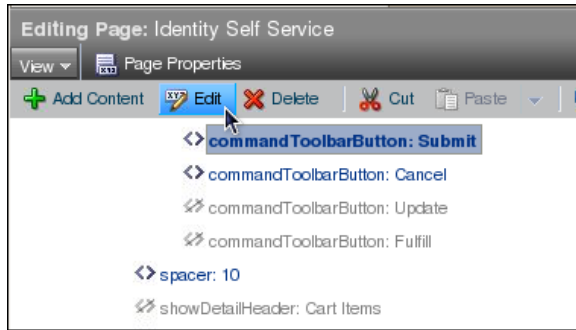
11. In the Component Properties: Submit dialog box, scroll down to the Text field. Click the drop-down arrow next to the field and select Expression Builder.

Customizing Oracle Identity Manager
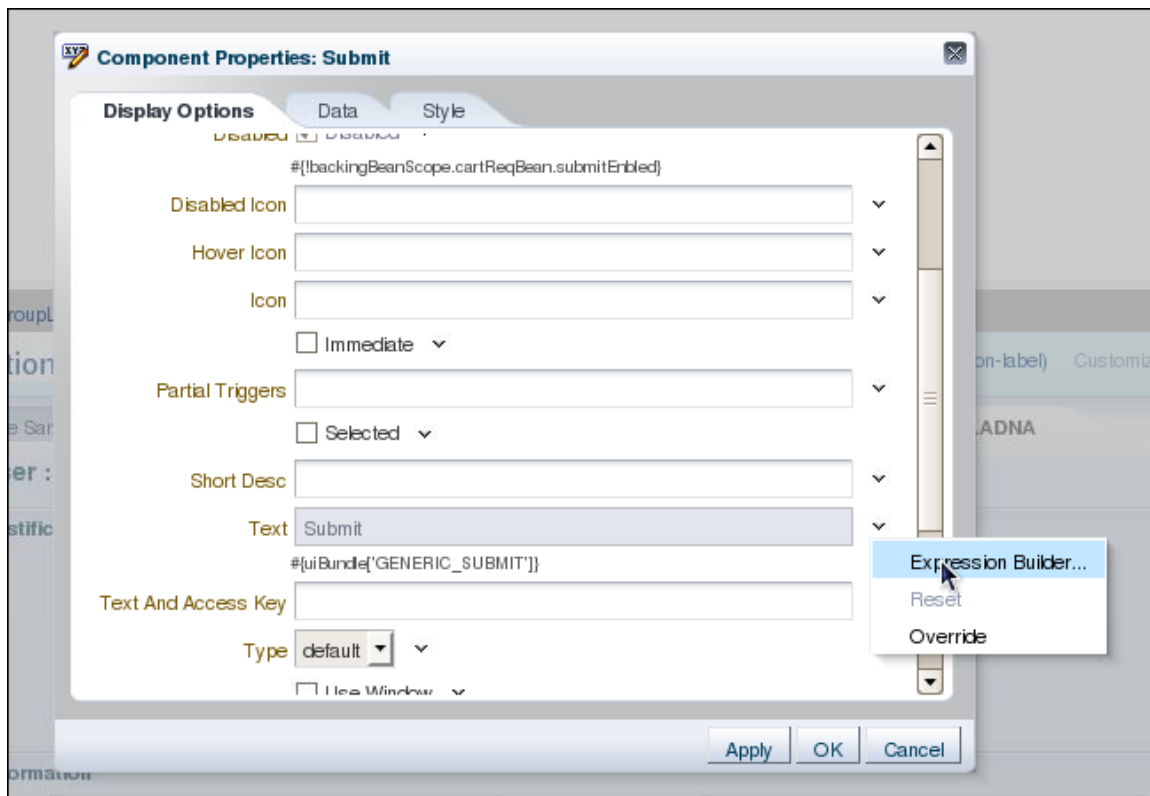
12. Enter `Apply` in the text area and click OK.
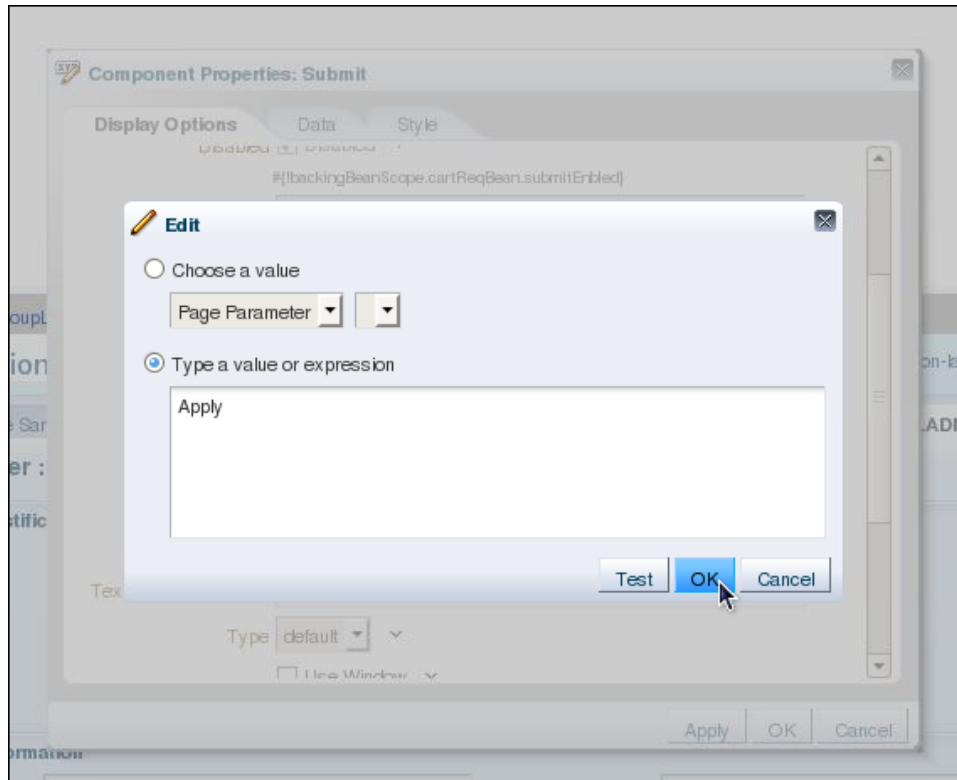
13. Click OK.
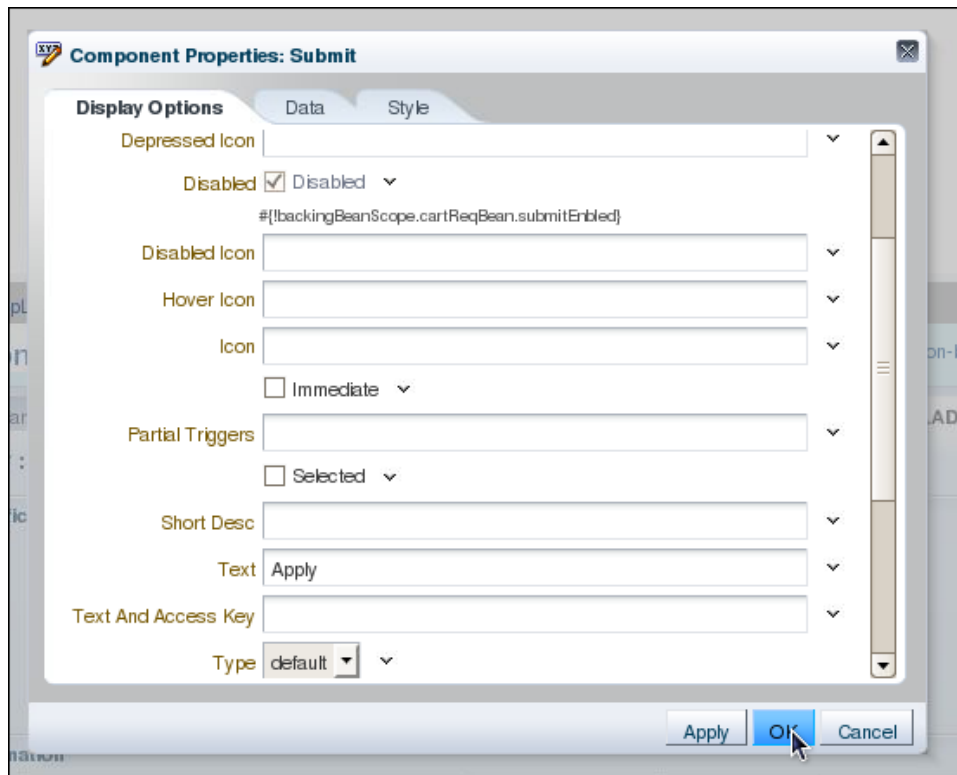
The button label is updated.

14. Click Close to close the Web Composer.

15. Close the Users, User Details, and Modify User tabs in the Identity Self Service Console.

    Note: Before publishing a sandbox, all tabs in the Console must be closed.

16. Publish the `Example_Corp_2` sandbox.

    You have modified the button label for a form.

Hiding User Interface Components

Overview

In this topic, you use the Web Composer to hide the Home Phone, Pager, Home Postal Address, and PO Box attributes on the User Attributes tab of Identity Self Service Console.

Tasks

1. Sign in to the Identity Self Service console as the `xelsysadm` user.

2. Create and activate a sandbox called `Example_Corp_3`.

3. Click Users under Administration.

4. Search for and click the link for the user `CSALADNA`.
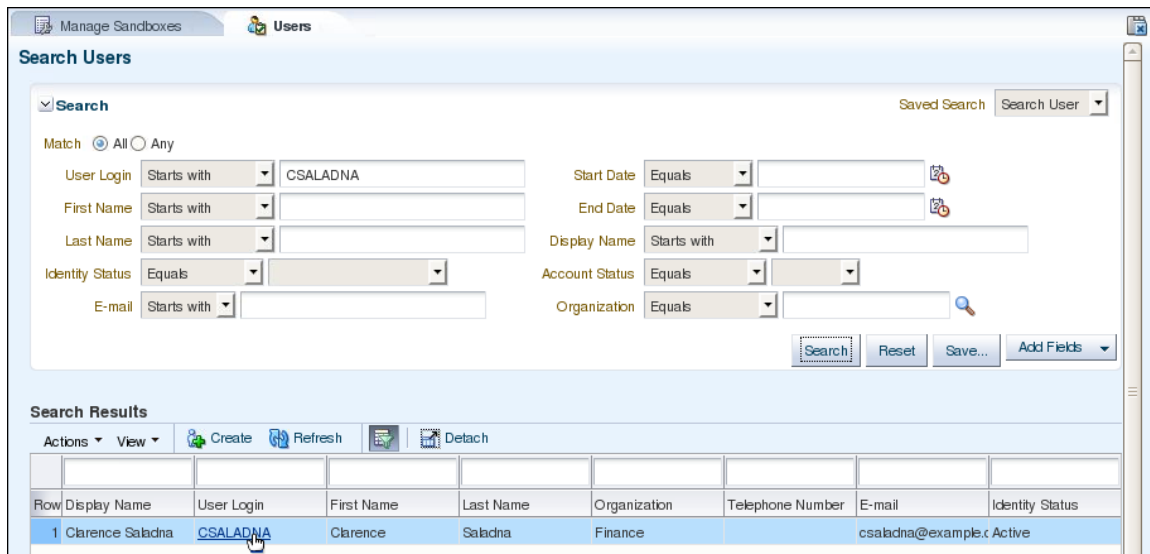
5. Click the Attributes subtab, if it is not already active.
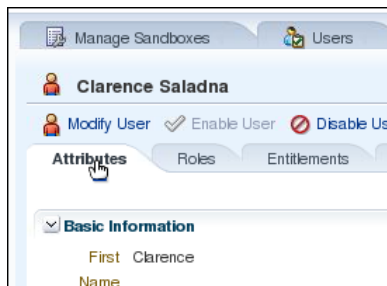
6. Collapse all the sections of the page so that only the Contact Information section is expanded.
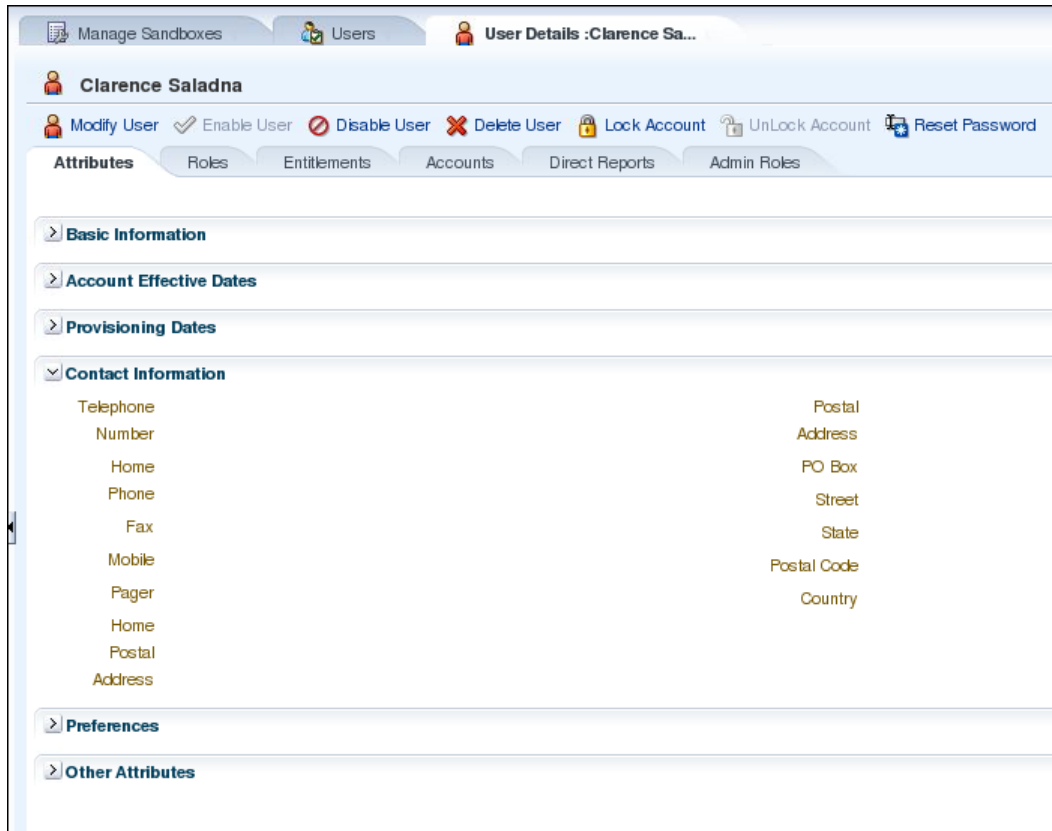
Note: Collapsing the sections simplifies navigating in the Web Composer, because fewer components are visible.

7. Click Customize to open the Web Composer.

8. Select Source from the View drop-down menu of the Web Composer.
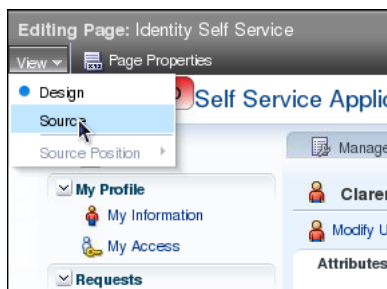
9. Click the area next to the Contact Information header to select it for editing in the Web Composer.
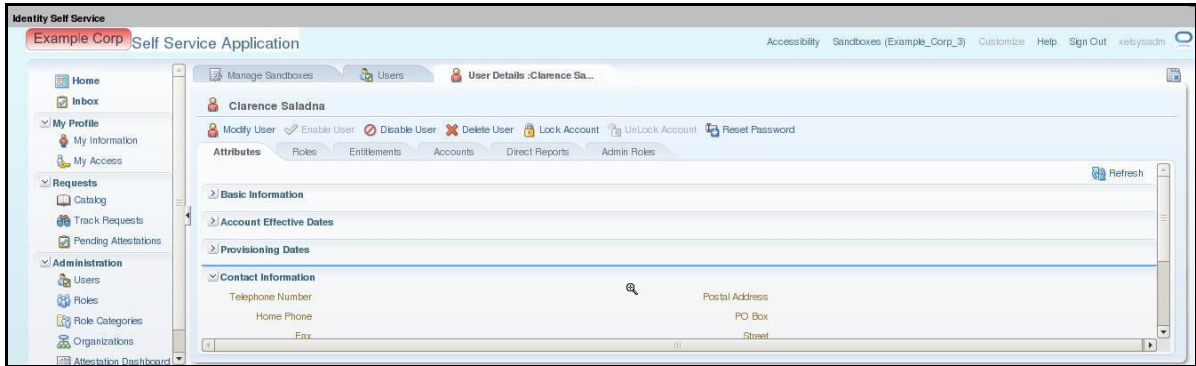
10. Click Edit to confirm editing of the task flow.
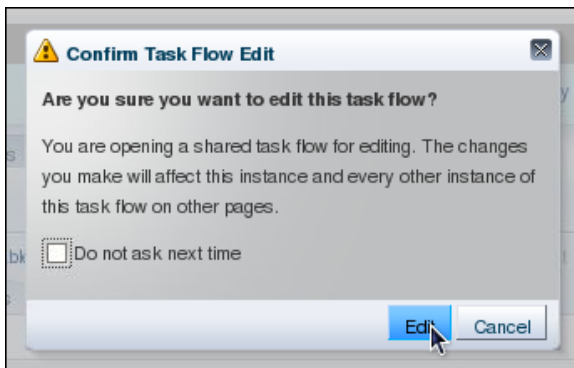
11. Select the panelFormLayout component under "showDetailedHeader: Contact Information" in the Web Composer.
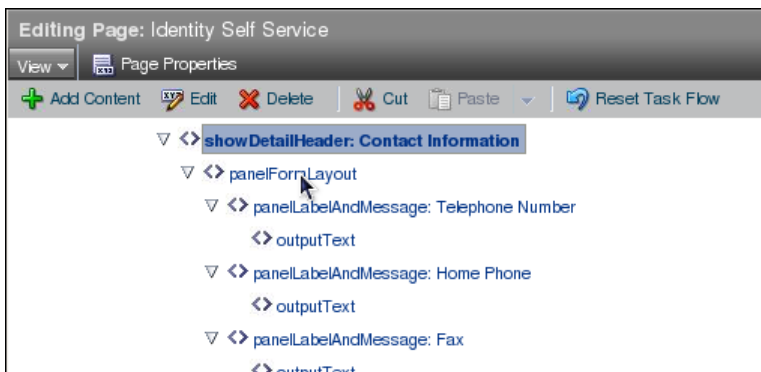
The selection in the Web Composer changes to the container for all the Contact Information attributes.

12. Click Edit.
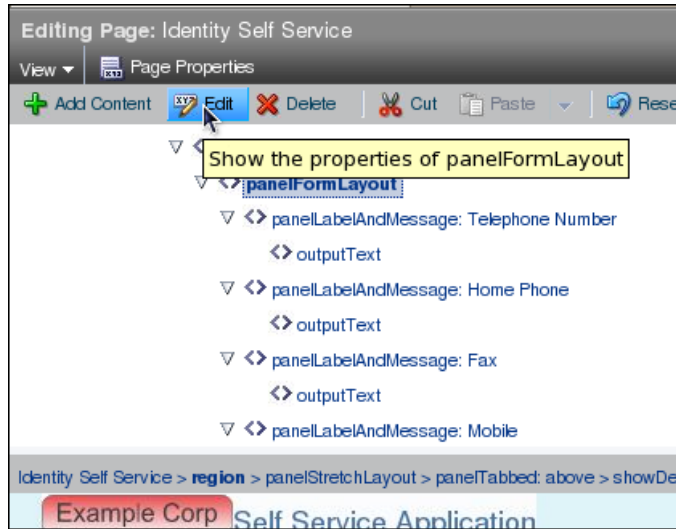
In the "Component Properties: panelFormLayout" dialog box, click the Child Components tab.
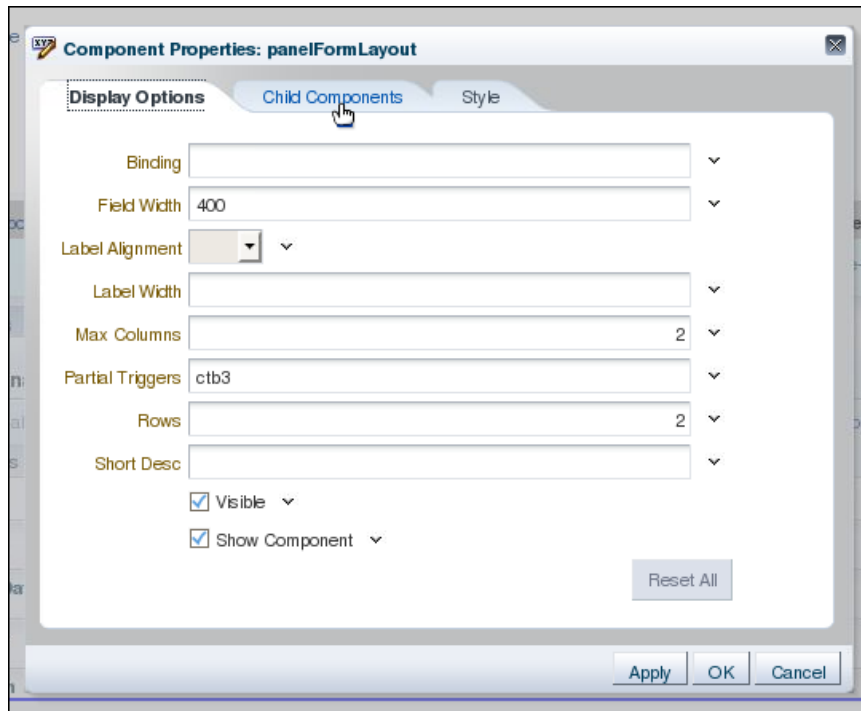
13. Deselect Home Phone, Pager, Home Postal Address, and PO Box, and click OK.
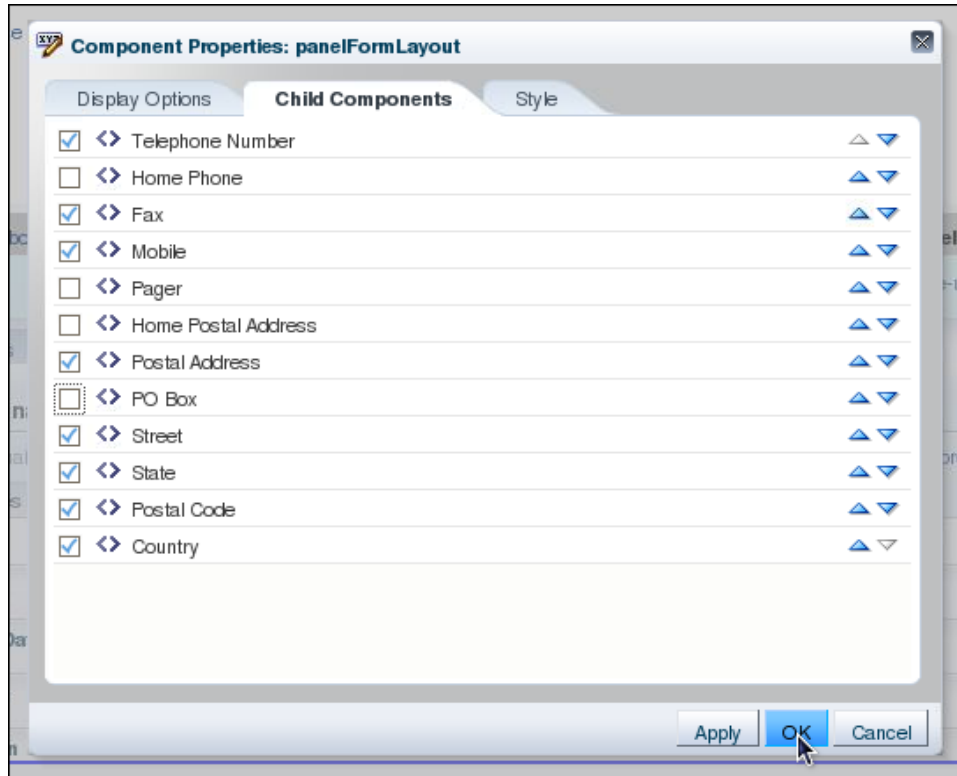
14. Click Close to close the Web Composer.
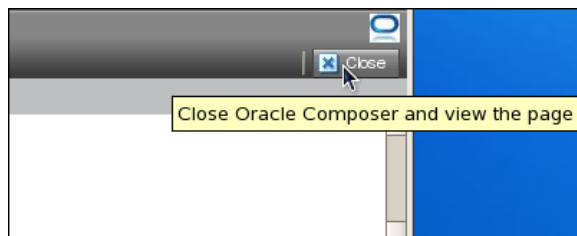
The deselected attributes are no longer displayed in the Identity Self Service Console.

Customizing Oracle Identity Manager
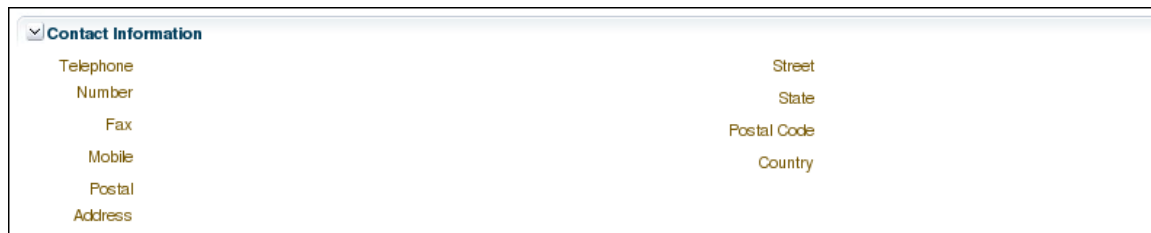
15. Expand the Basic Information, Account Effective Dates, and Provisioning Dates sections.
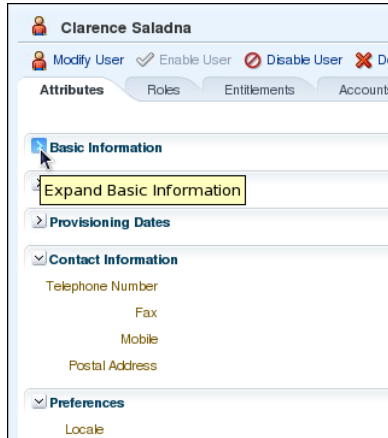
Note: This returns the expansion state of these sections to their default settings.

16. Close the "User Details : Clarence Saladna" and Users tabs.

    Note: If you receive an error message, log out of the Identity Self Service Console and log back in.

17. Publish the sandbox called `Example_Corp_3`.

    You have hidden User Interface artifacts using the Web Composer.

Customizing Oracle Identity Manager

Adding and Managing Custom User Attributes

Overview

The set of user attributes defined in a default installation of Oracle Identity Manager, although comprehensive, may not meet the requirements of an organization. In this topic, you perform the following tasks:

- Define a custom user attribute, Salary

- Add a field for the attribute to the View User Details and Modify User pages in the Identity Self Service Console

- Use Expression Language to hide the attribute for all users, except users assigned to the HR Manager and System Administrator roles

Tasks

1. Define a custom user attribute. To do this, perform the following:

   a. Sign in to the Identity System Administration Console as the `xelsysadm` user.

   b. Create and activate a sandbox called `Example_Corp_4`.

   c. Click Form Designer under Configuration.
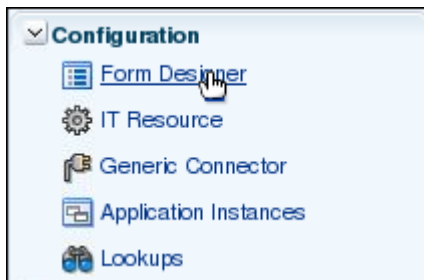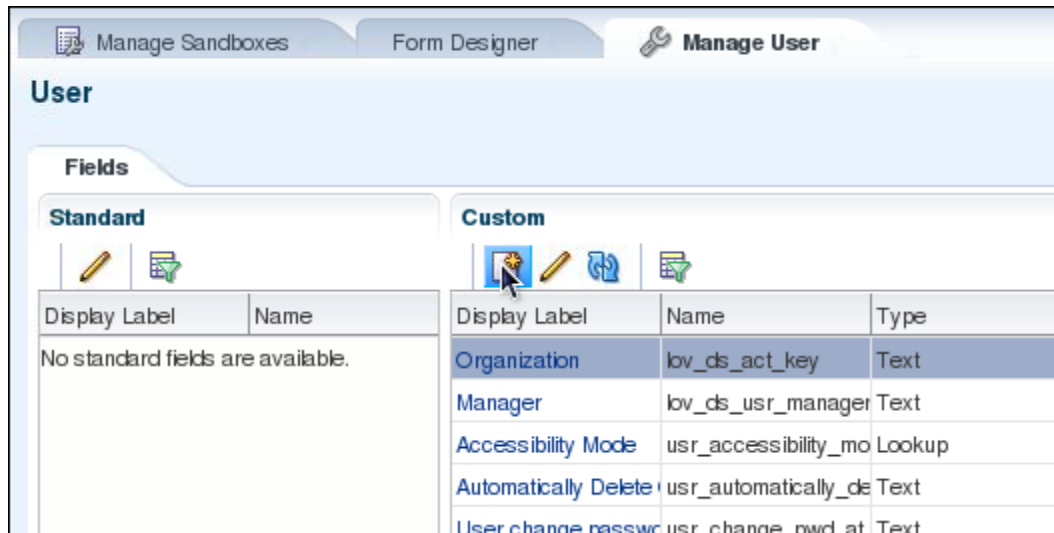
   d. Select User from the Type drop-down menu and click Search.
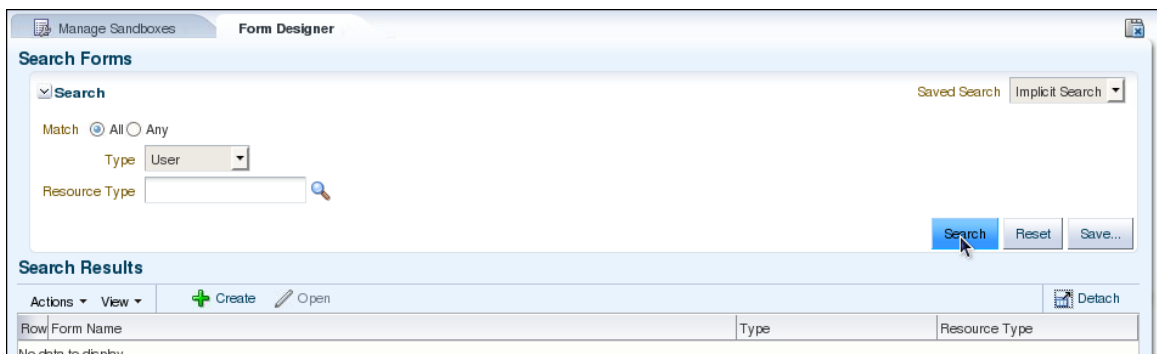
   e. Click User in the Search Results list to open the form.
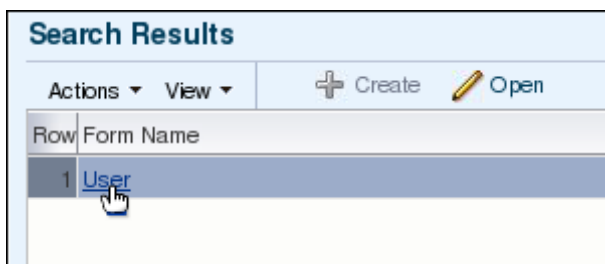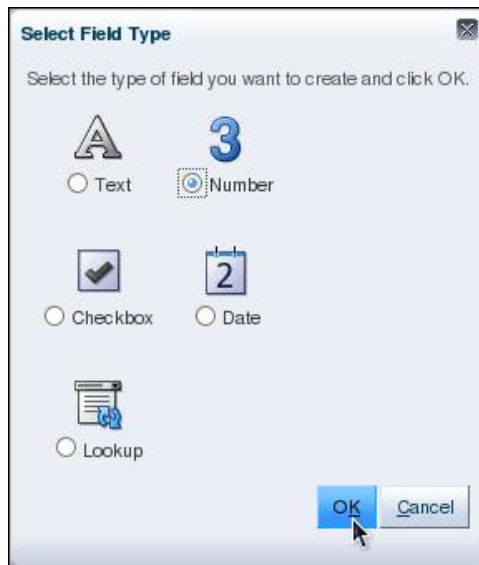
f.   Click the Create icon ( ) to create a new field.

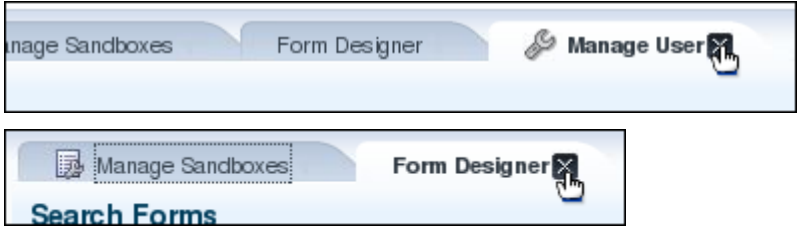g.   Select Number and click OK.
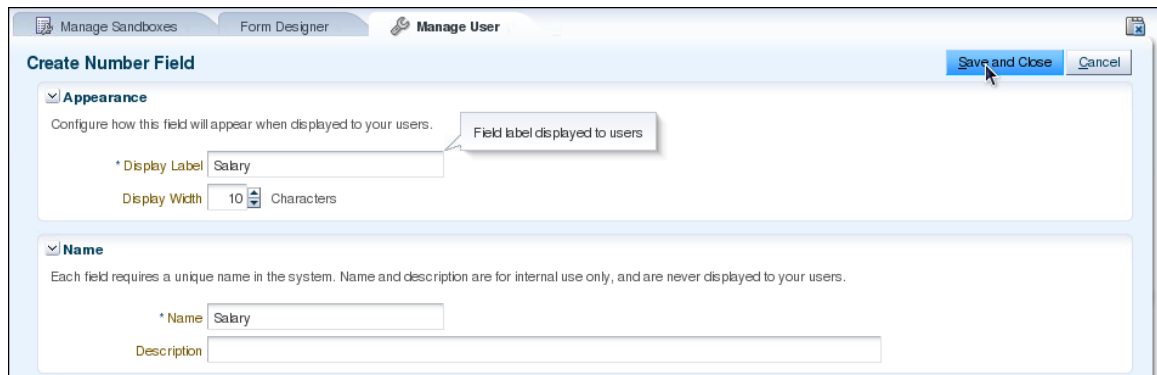
h.   In the Display Label field, enter `Salary`. Click Save and Close.

Note: The Name field is populated automatically.

i. Close the Manage User and Form Designer tabs.

j. Export the `Example_Corp_4` sandbox to your machine. Then, publish the sandbox. For this topic, the sandbox is exported to the `/home/oracle/sandboxes/first` directory.

You have added a custom user attribute. Next, you add the attribute to the View User Details and Modify User Details pages.

Note: You must publish the sandbox where a custom user attribute is defined before adding the attribute to other user interface forms, because the attribute is not available for selection as a display component until the sandbox is published.

2. Customize the View User Details page to display the custom user attribute. To do this, perform the following:

a. Sign in to the Identity Self Service Console as the `xelsysadm` user.

b. Create and activate a sandbox called `Example_Corp_4a`.

c. Click Users under Administration.
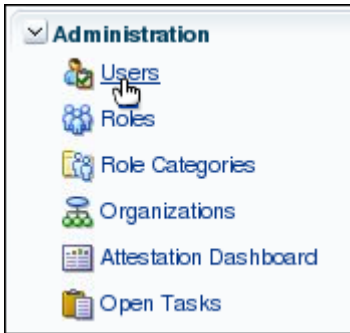
d. Search for user `CSALADNA` and click the user link.
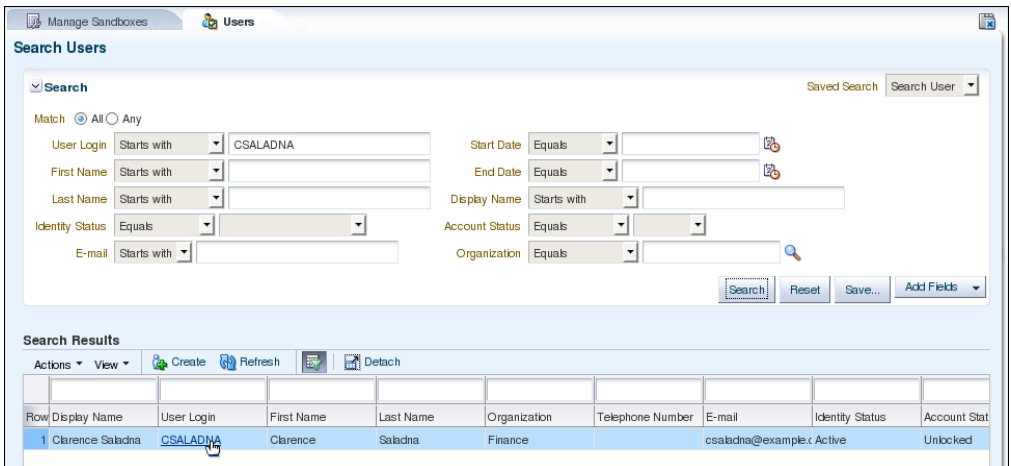
Note: It is not important that you open any particular user. Editing the View User Details page in the Web Composer requires the page to be open. To do this, you can search for and open the user details for any user.
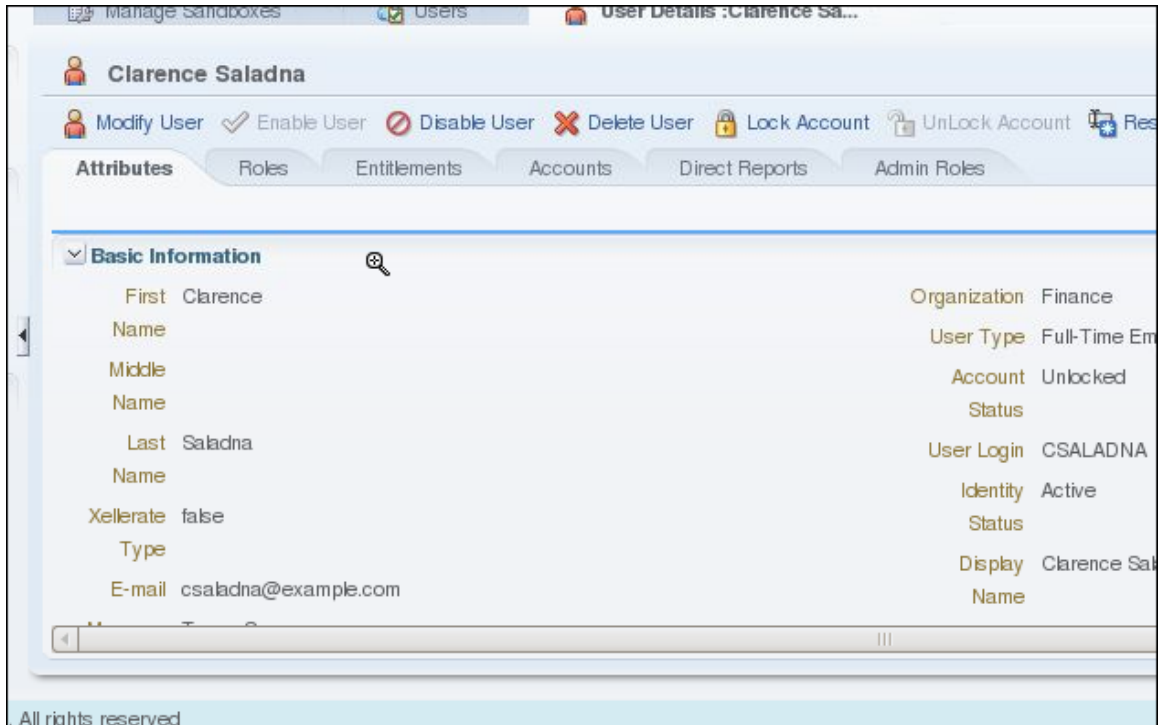
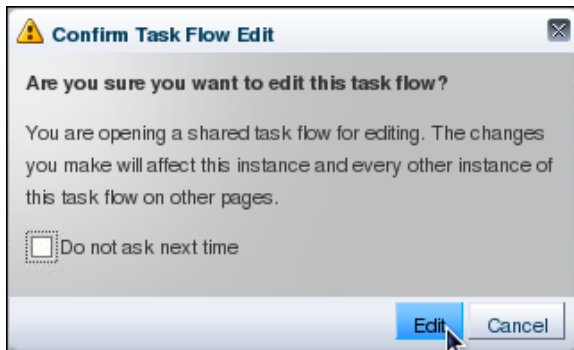e. Make sure that the Attributes tab is active. If it is not, click the tab.
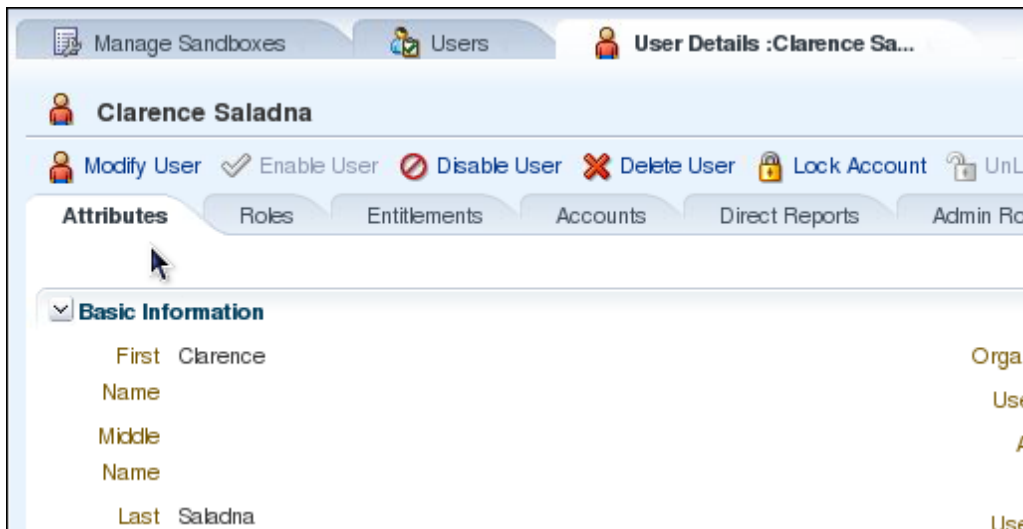
f. Click Customize to open the Web Composer.

g. Select View > Source from the Web Composer menu.
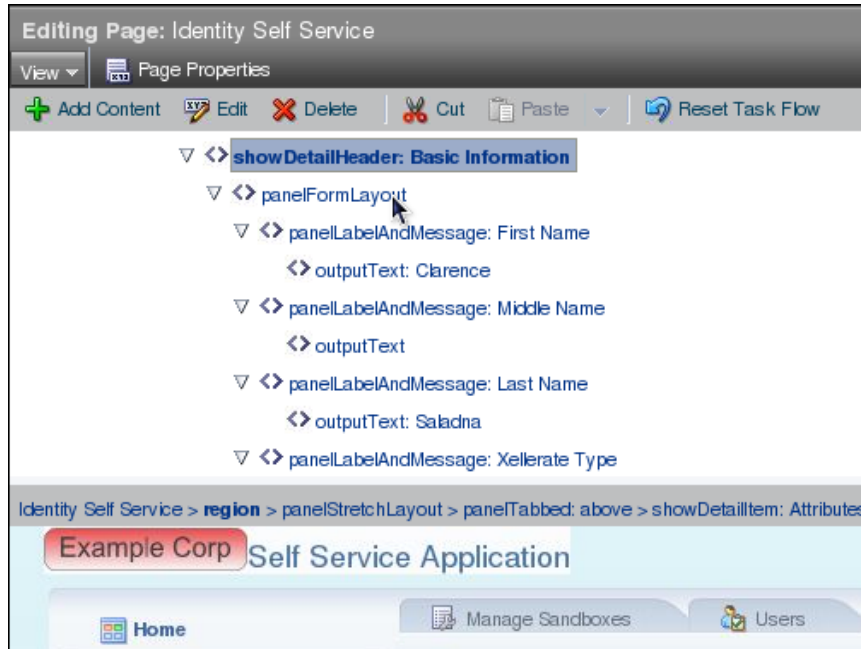
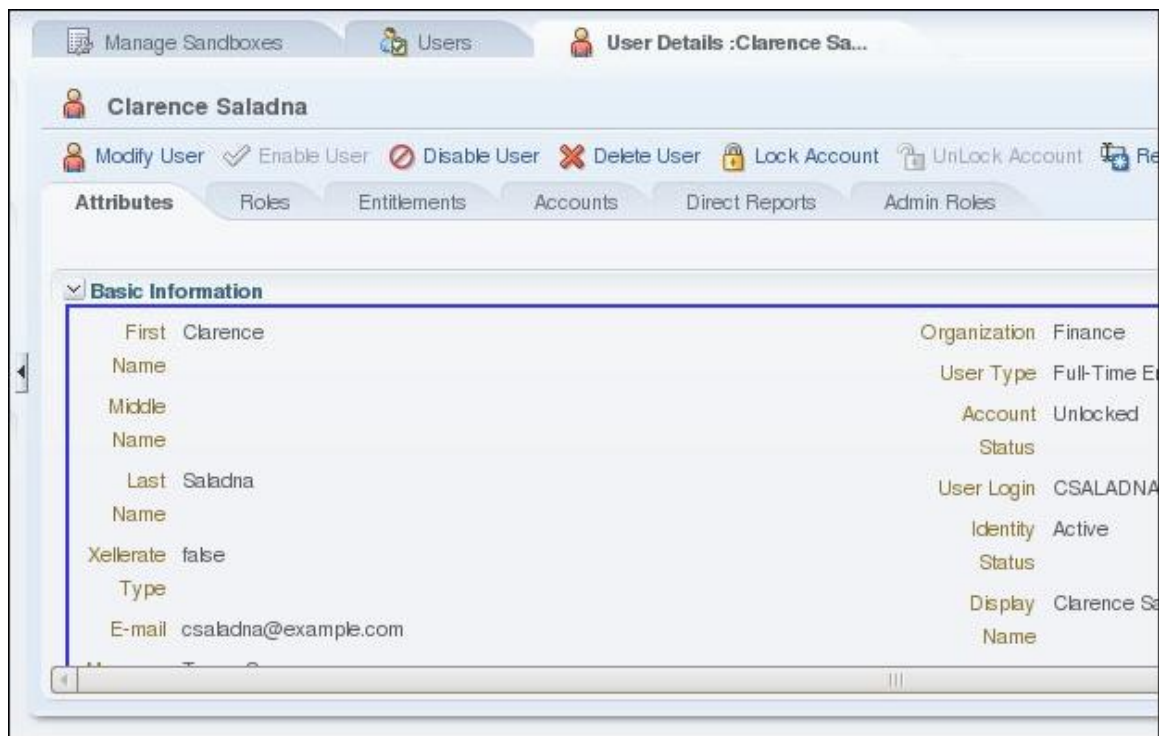h. Click the Basic Information region to select it for editing in the Web Composer.

i. Click Edit to confirm that you wish to edit the task flow.

j. In the Web Composer pane, select panelFormLayout.

The selection on the View User Details page changes to all fields for the Basic User Information section.

Note: The panelFormLayout component is the ADF container component that contains the fields in the Basic Information section of the View User Details page.

k. Click Add Content.
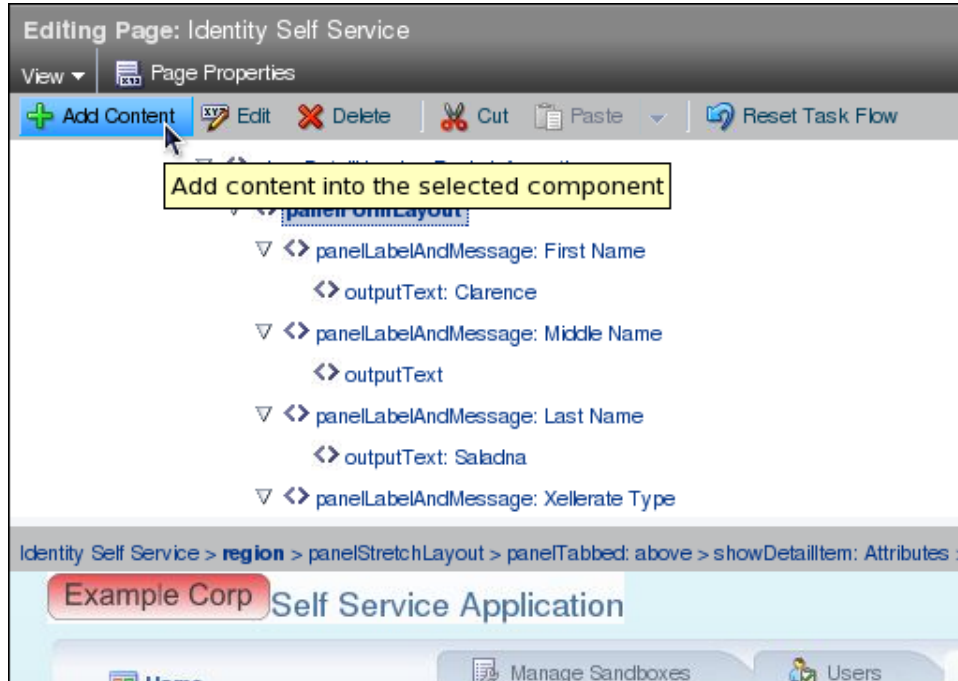
Note: This adds content to the selected component. Because the container for the Basic Information section is selected, the new field will be added to this section.

l. In the Add Content dialog box, scroll down to find the Data Component – Manage Users entry. Click Open.
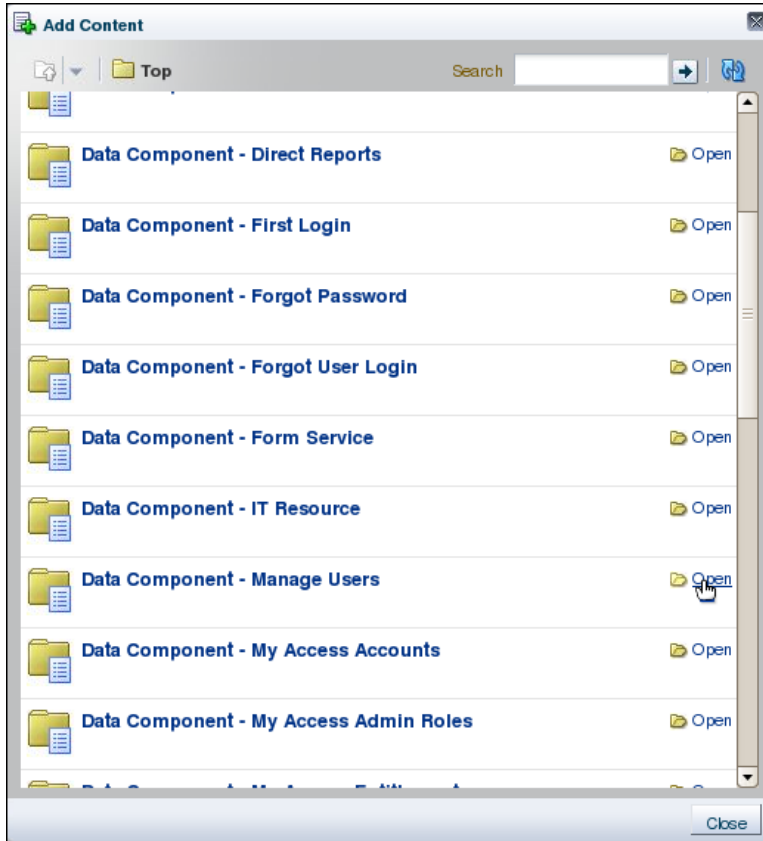

Note: These Data Components are Java beans, which implement the data access layer within Oracle Identity Manager. By selecting the correct bean and attribute, the field on a page is mapped to a particular attribute of an entity. In this topic, you map the field on the page to the `Salary` attribute of the User entity.
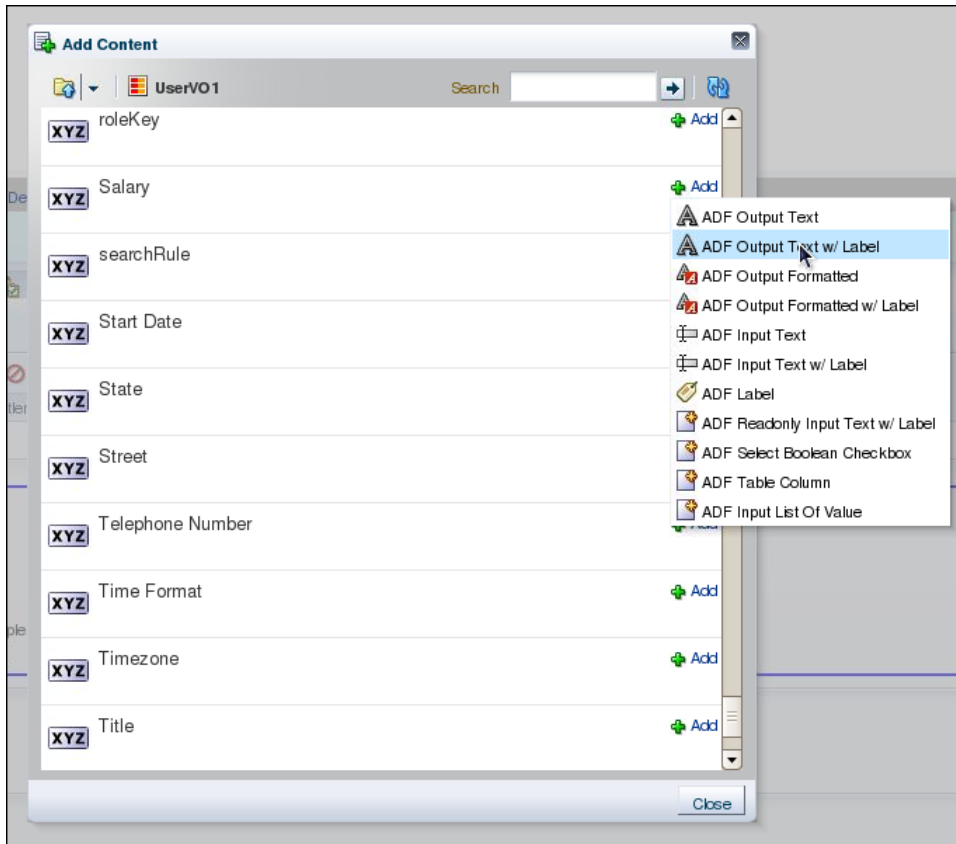
m. Scroll down to find the UserVO1 entry. Click Open.
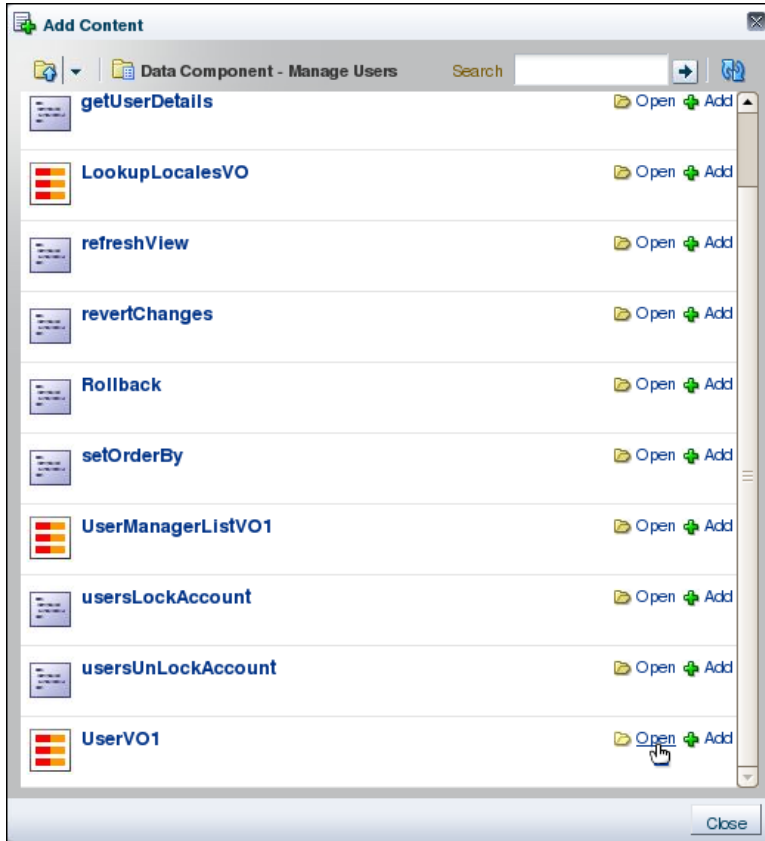
n.   If the list of attributes is empty, click Refresh (⟳).
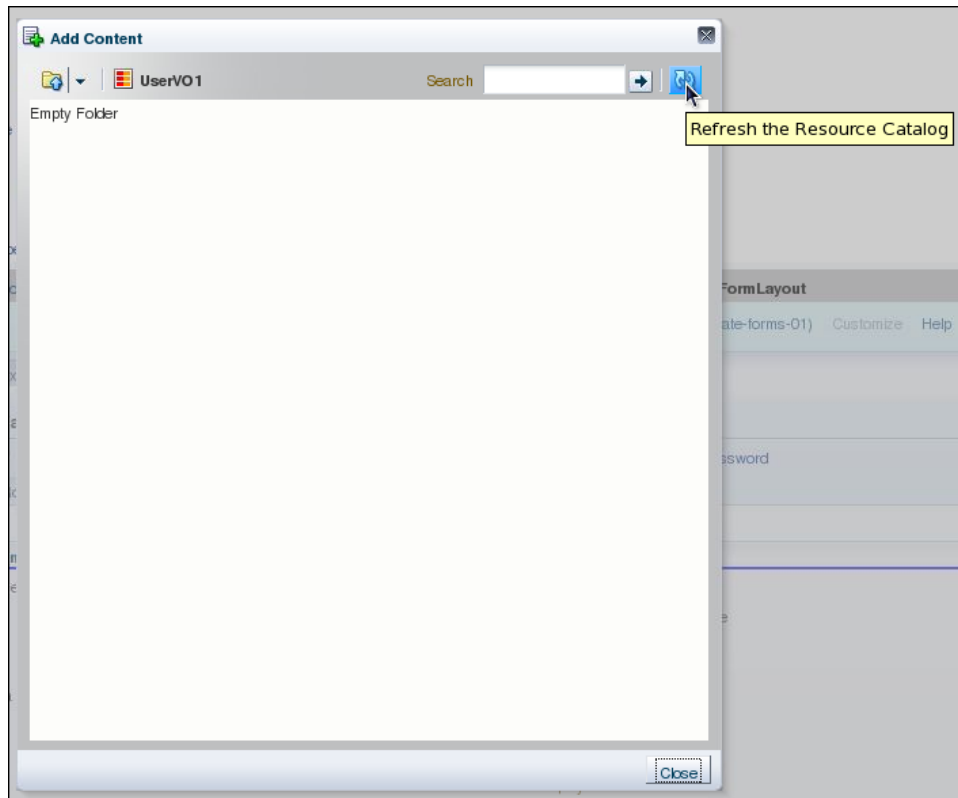
All available attributes are displayed.

Customizing Oracle Identity Manager

o. Scroll down until you see the `Salary` attribute. Click Add and from the pop-up menu, select "ADF Output Text w/ Label."


The component for displaying the `Salary` attribute is added to the panelFormLayout component.
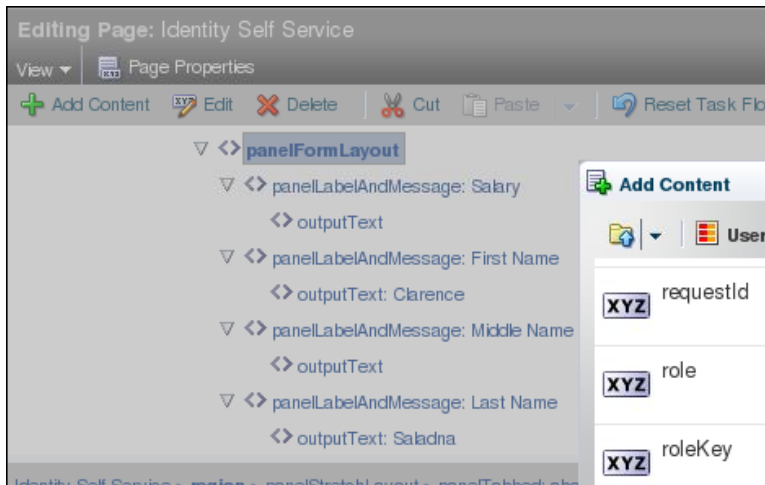
Note: The selection of the component from the pop-up menu determines how the attribute is displayed on the page. On the View User Details page, the attributes should be displayed as non-editable text, so you select "ADF Output Text w/ Label."
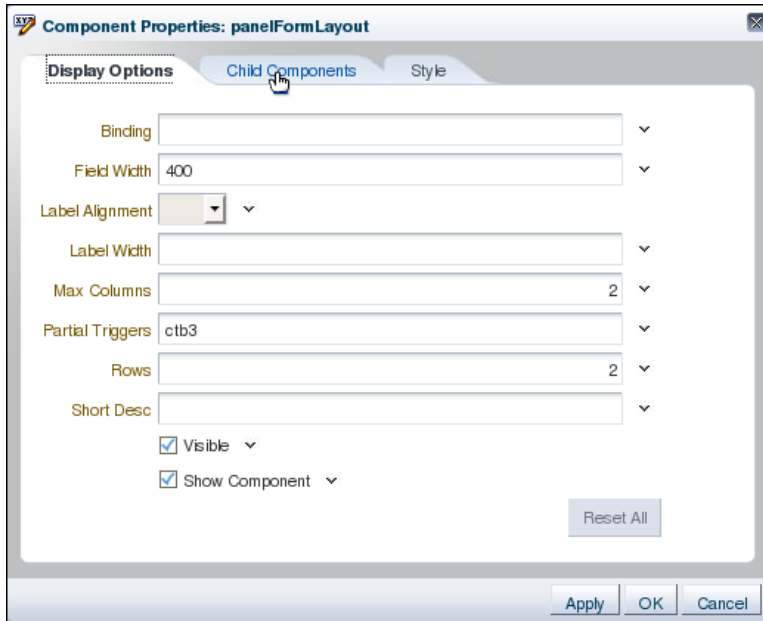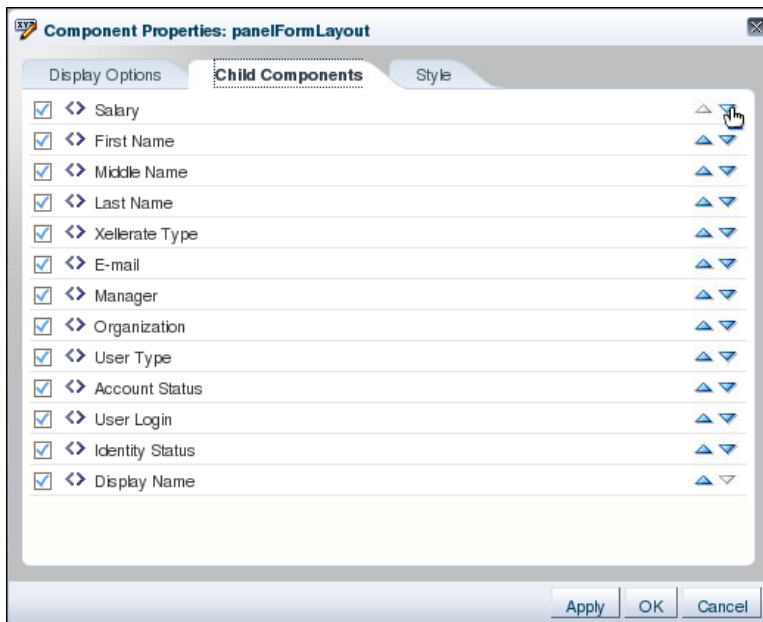
p.   Click Close to close the Add Content dialog box.
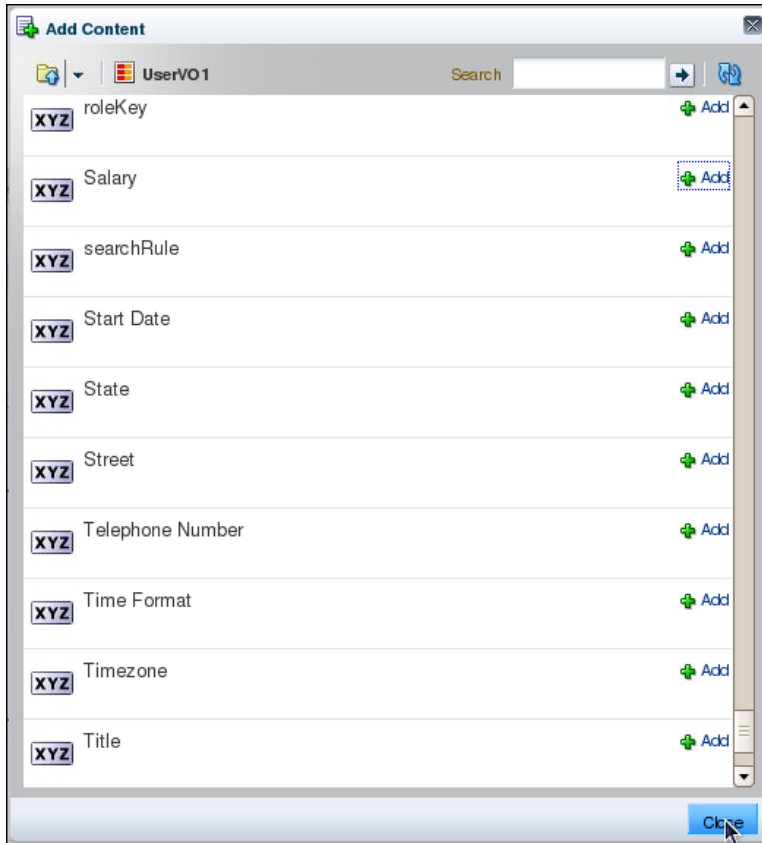
q.   Ensure that the panelFormLayout component is still selected and click Edit.
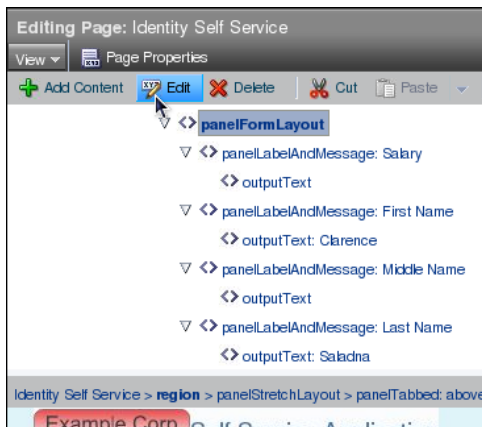
r. In the Component Properties dialog box, click the Child Components tab.

s. Use the down arrow icons to move the Salary component to the bottom of the list.

Note: Each click of the down arrow icon moves the component down by one row. Continue to click the down arrow icon for the Salary component until it is at the bottom of the list.

Customizing Oracle Identity Manager

t.   Click OK.
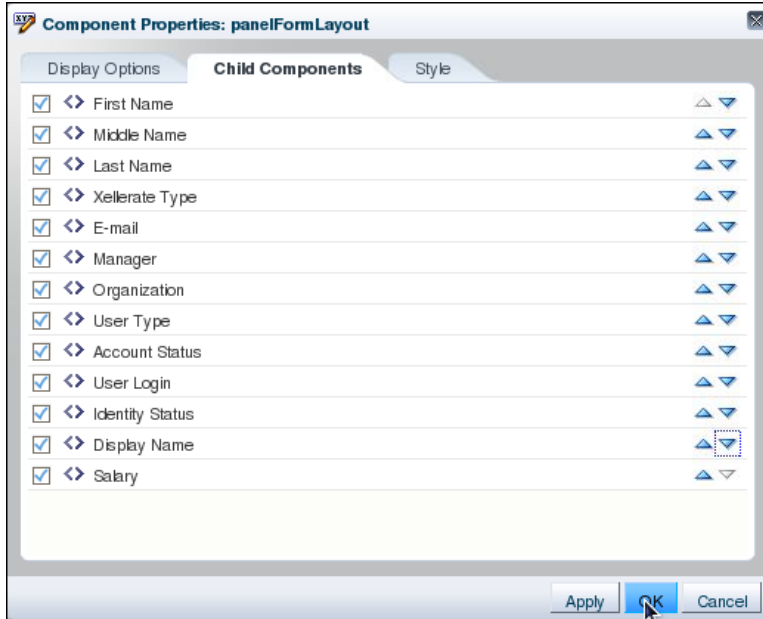
Note: This moves the Salary field to the bottom of the Basic Information section of the View User Details page.
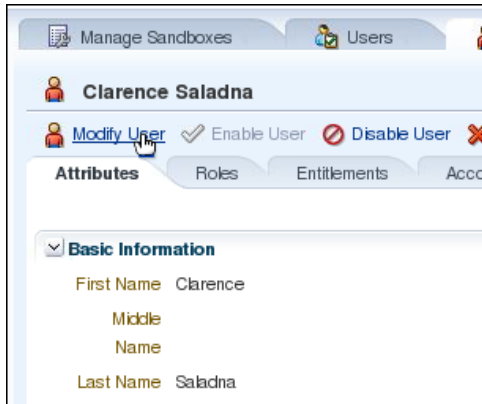
u.   Click Close to close the Web Composer.

v.   Verify that the Salary field appears in the Basic Information section of the View User Details page.
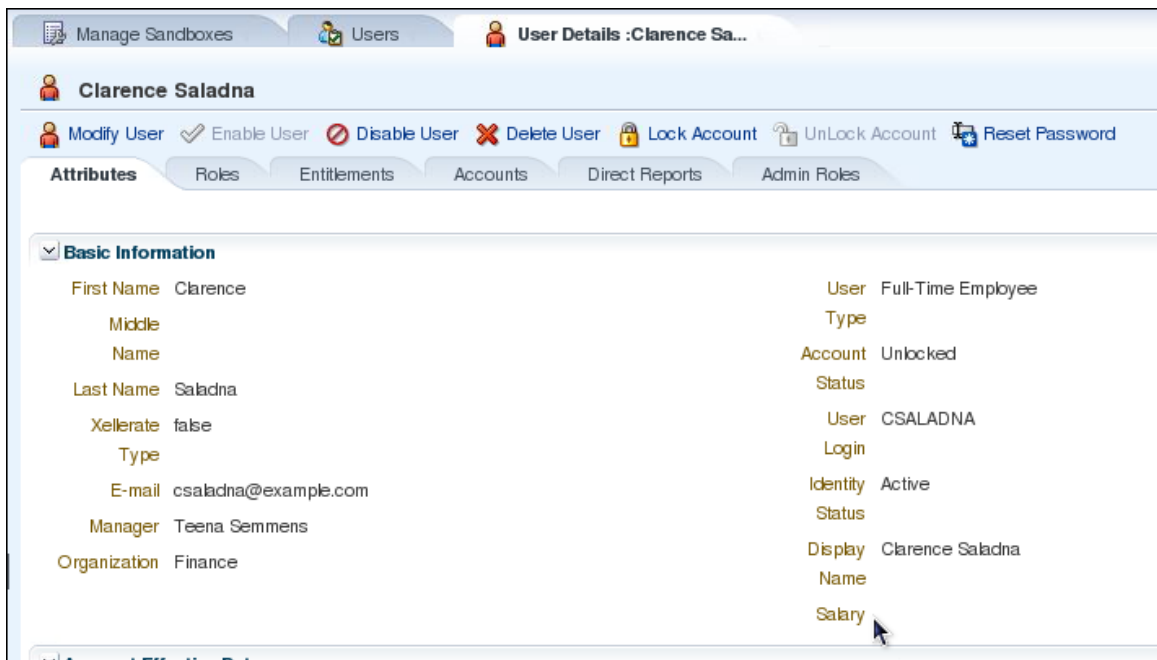
You have added the field to the View User Details page.

3. Customize the Modify User page to add the custom attribute. To do this, perform the following:

   a. Click Modify User.

   The Modify User page is displayed.

   b. Click Customize to open the Web Composer.

   c. Select View > Source from the Web Composer menu.

d.   Click the Basic Information region to select it for editing in the Web Composer.

e.   Click Edit to confirm that you wish to edit the task flow.

f.   In the Web Composer pane, select panelFormLayout.

The selection on the View User Details page changes to all fields for the Basic User Information section.

g. Click Add Content.

h. In the Add Content dialog box, find the Data Component – Catalog entry and click Open.
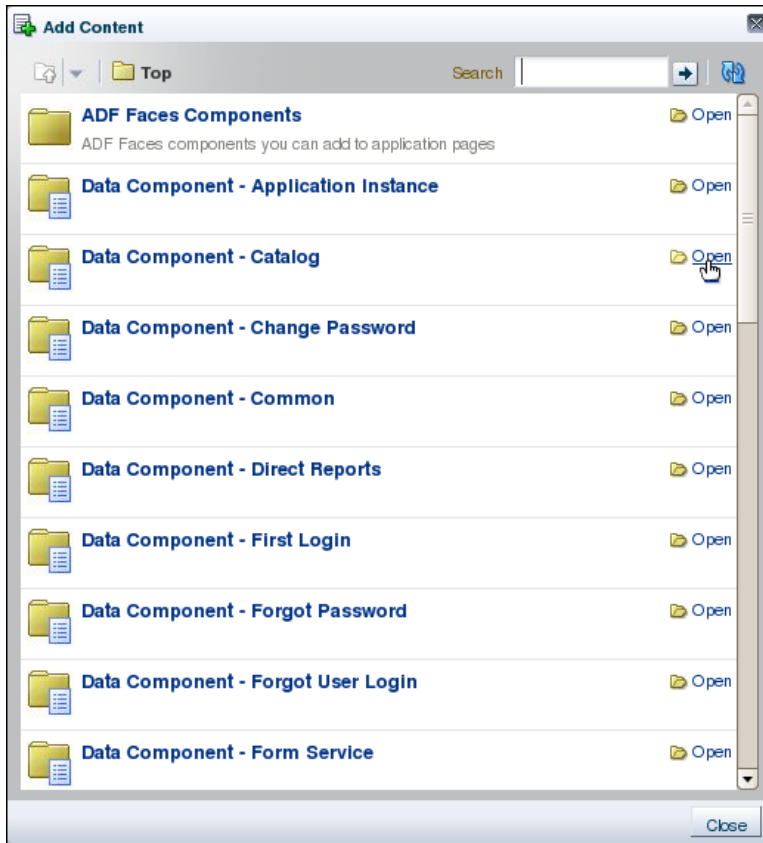
Note: The Data Component – Catalog entry is selected, because this is the bean that is used when modifying users.

Customizing Oracle Identity Manager

i. Scroll down to find the UserVO entry and click Open.
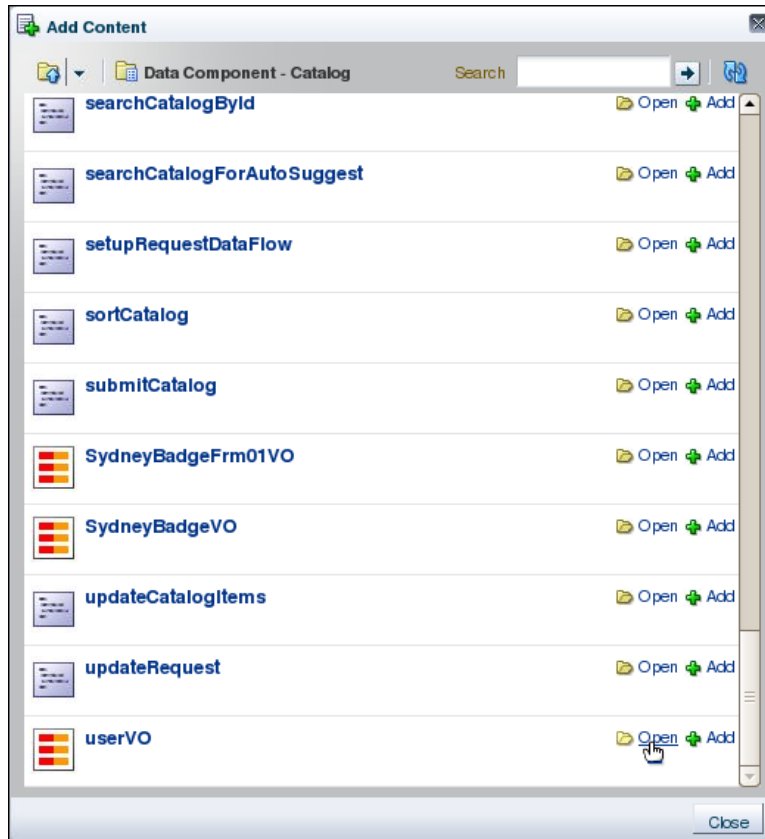
j. If the list of attributes is empty, click Refresh () to reload the list.

Customizing Oracle Identity Manager
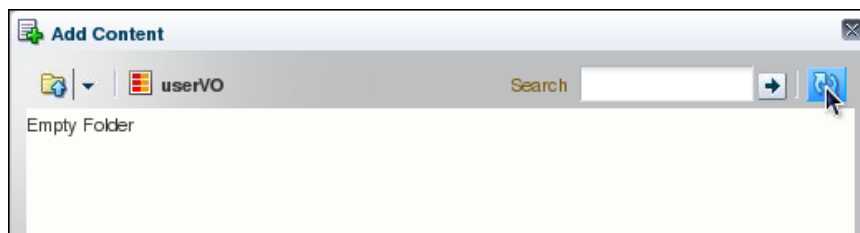
k. Scroll down to find the Salary entry, click Add, and select "ADF Input Text w/label" from the pop-up menu.
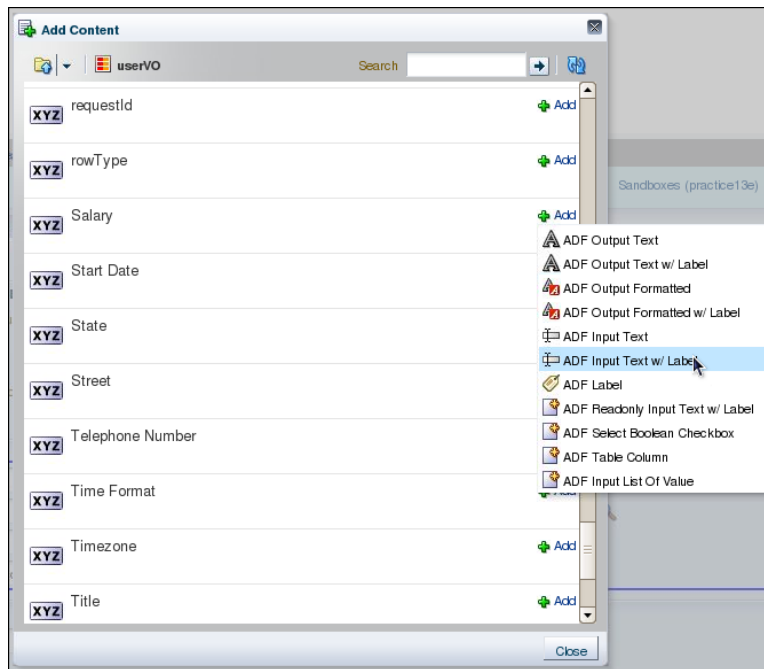
The component for displaying the `Salary` attribute is added to the panelFormLayout component.

Customizing Oracle Identity Manager
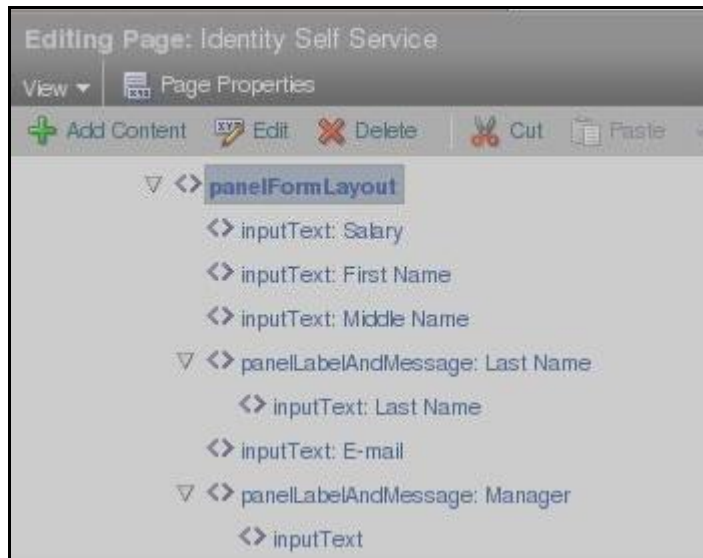
l.   Click Close to close the Add Content dialog box.
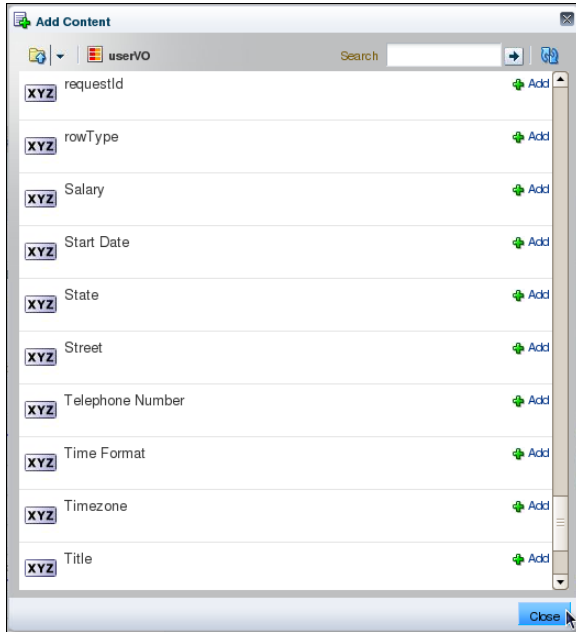
m.   In the Web Composer pane, select the "inputText: Salary" component and click Edit.
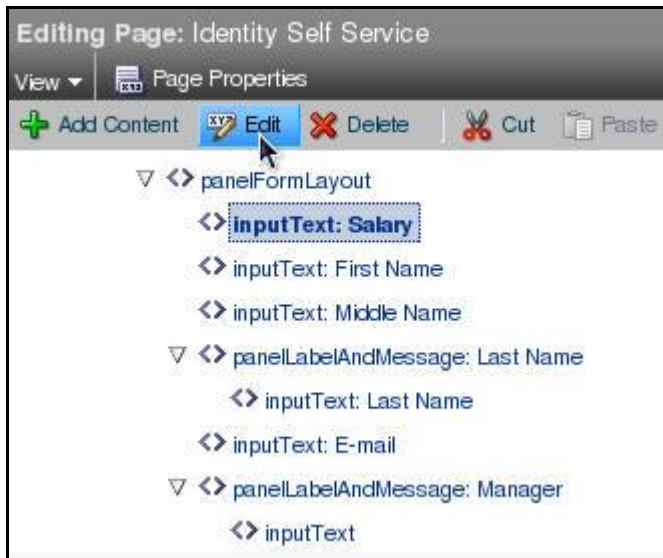
n. Select the check box for Auto Submit and Click OK.
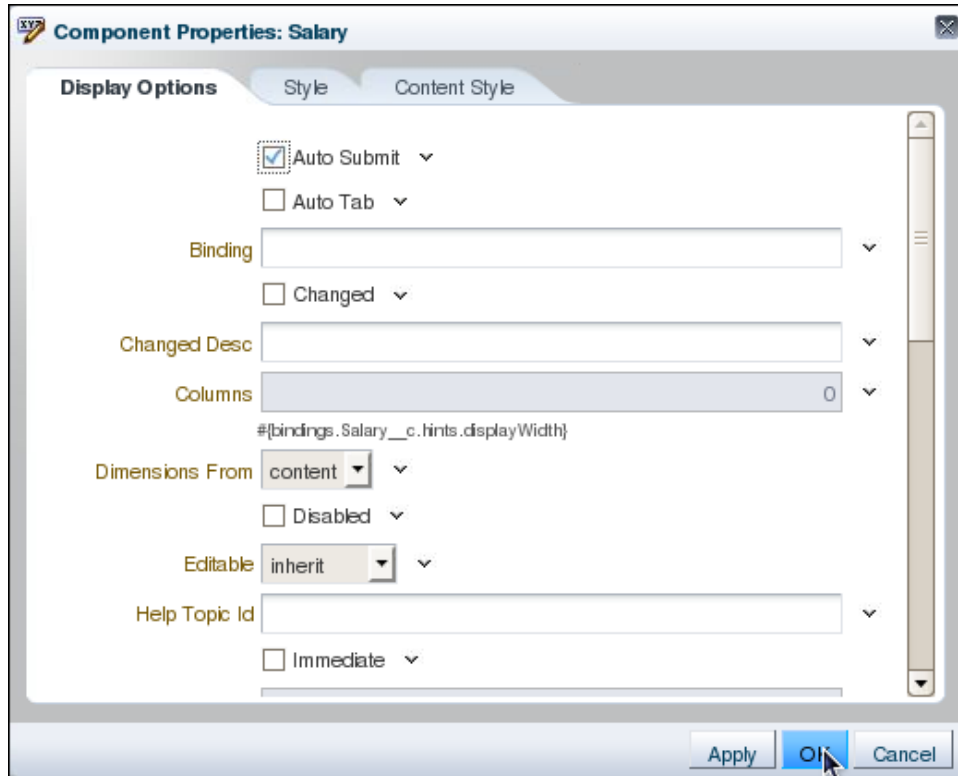
Note: The `Auto Submit` property is used by ADF to asynchronously send changes to the underlying data component, using AJAX technology.

o. Select the `panelFormLayout` component and click Edit.
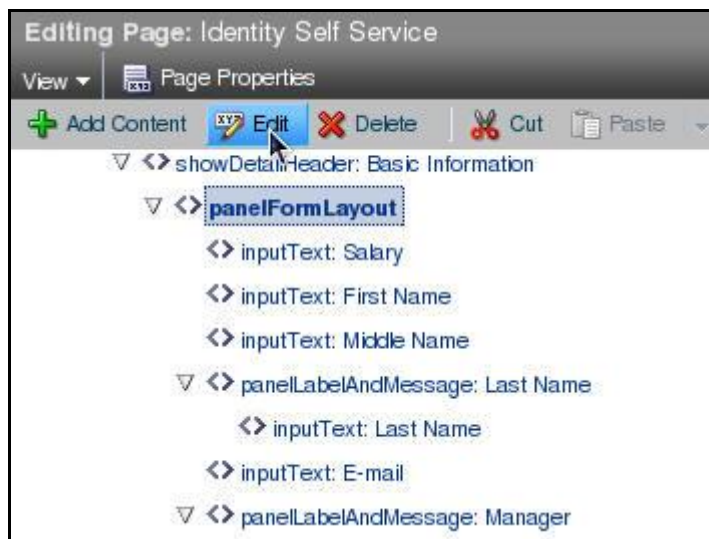
p. In the Component Properties dialog box, click the Child Components tab.
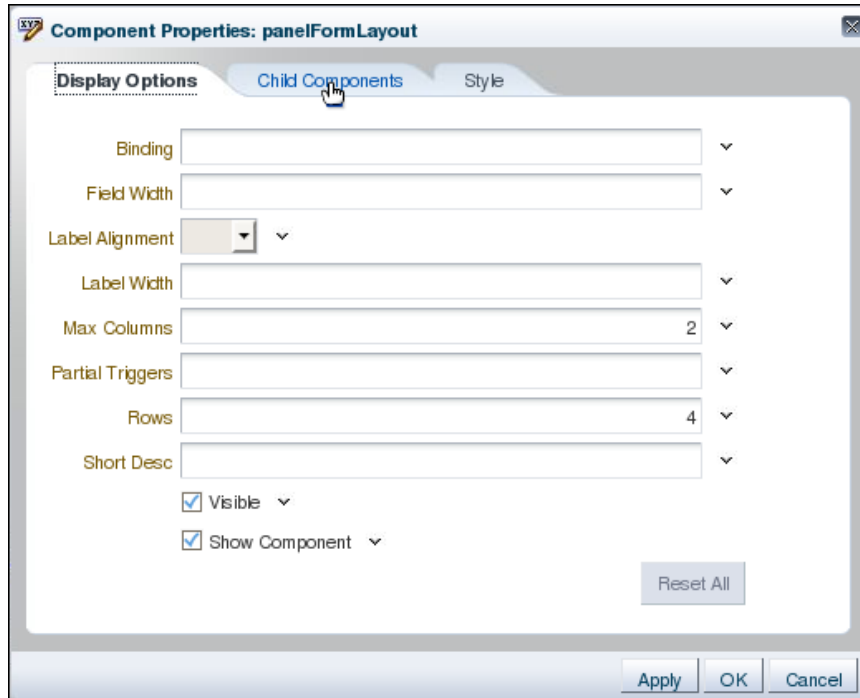
q. Use the down arrow to move the Salary component to bottom of the list.
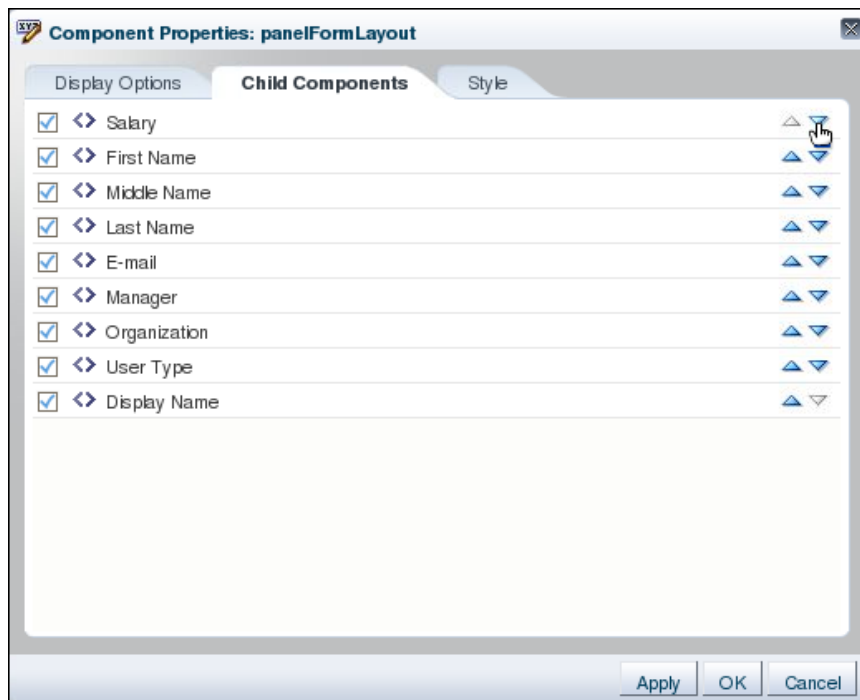
Note: Each click of the down arrow icon moves the component down by one row. Continue to click the down arrow icon for the Salary component until it is at the bottom of the list.

---

r. Click OK.
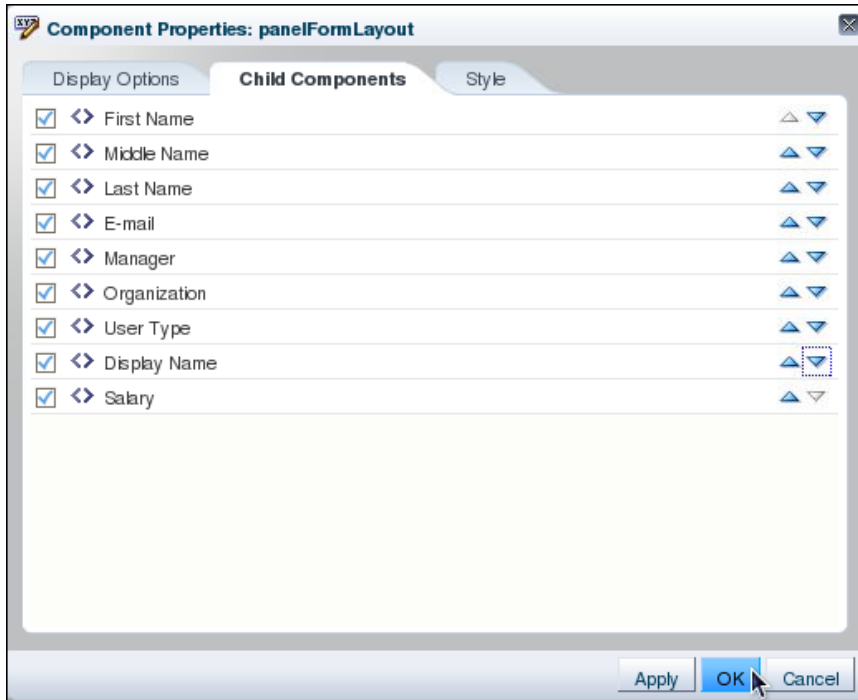
s. Click Close to close the Web Composer.

t. Close all the tabs, except for the Manage Sandboxes tab.

u. Select the current sandbox to highlight it.

Note: Do not click the name of the sandbox, because this will open the Details page for the sandbox. Instead, click in the row for the sandbox entry.

v. Click Export Sandbox.

w. In the Download files dialog box, make sure that Save File is selected and click OK.
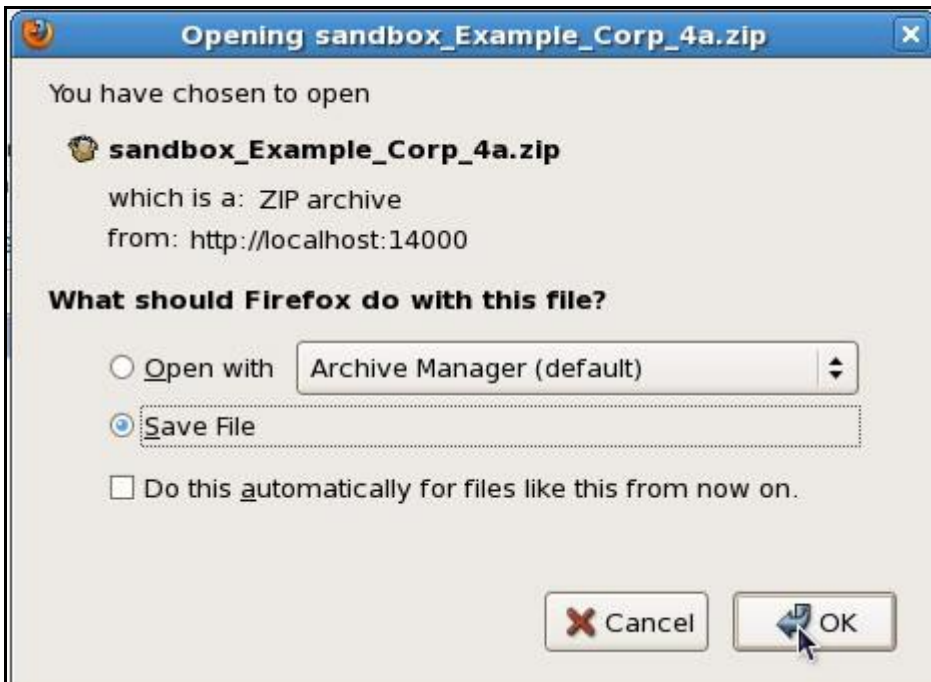
x. Click the triangle next to "Browse for other folders."
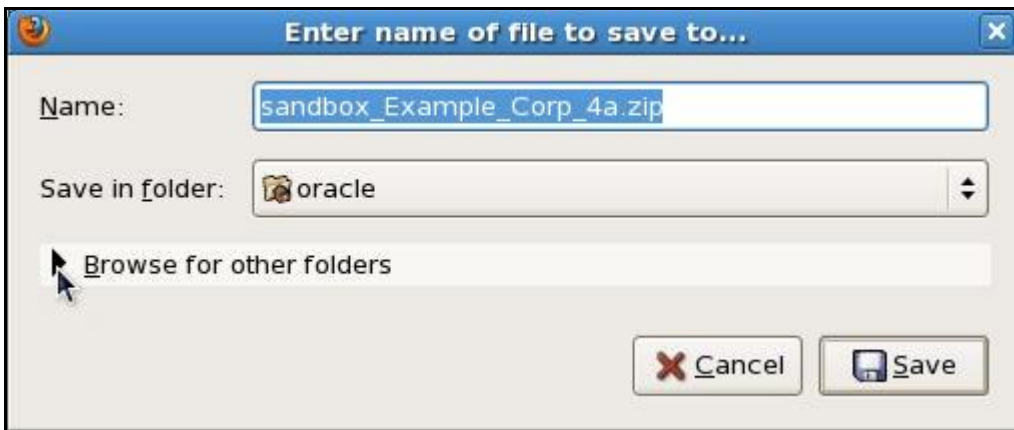
y. Browse to the `/home/oracle/sandboxes/second` directory, and click Save.
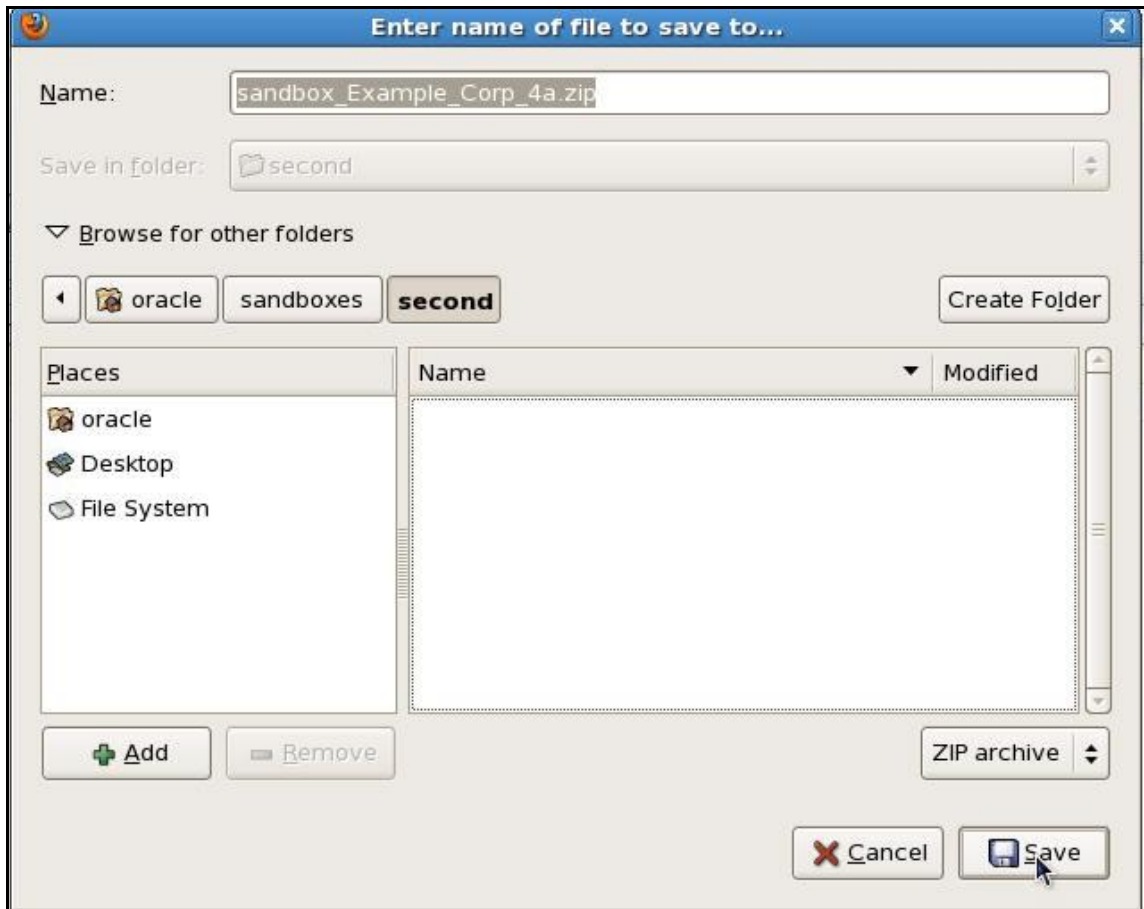
A Downloads dialog box appears, confirming that the file has been saved.

z. Close the Downloads dialog box.

aa. Make the Terminal window active and navigate to the `/home/oracle/sandboxes/second` folder.

bb. Unpack the exported sandbox, by entering the following command:

`unzip sandbox_Example_Corp_4a.zip`

```
/home/oracle> cd /home/oracle/sandboxes/second
/home/oracle/sandboxes/second> unzip sandbox_Example_Corp_4a.zip
```

cc. Open the XML file that contains the modifications to the Modify User page, by entering the following command:

```
gedit
oracle/iam/ui/runtime/form/view/pages/mdssys/cust/site/site/user
ModifyForm.jsff.xml
```

```
/home/oracle/sandboxes/second> unzip sandbox_Example_Corp_4a.zip
Archive:  sandbox_Example_Corp_4a.zip
  inflating: oracle/iam/ui/manageusers/pages/mdssys/cust/site/site/userdetails.j
sff.xml
  inflating: oracle/iam/ui/manageusers/pages/mdssys/cust/site/site/userdetailsPa
geDef.xml.xml
  inflating: pageDefs/oracle/iam/ui/runtime/form/view/pages/mdssys/cust/site/sit
e/userModifyFormPageDef.xml.xml
  inflating: oracle/adfinternal/pageeditor/pep/mdssys/cust/site/site/rcvui.jspx.
xml
  inflating: mdssys/sandbox/active_mdsSandboxMetadata.xml
  inflating: oracle/iam/ui/runtime/form/view/pages/mdssys/cust/site/site/userMod
ifyForm.jsff.xml
/home/oracle/sandboxes/second> gedit oracle/iam/ui/runtime/form/view/pages/mdssy
s/cust/site/site/userModifyForm.jsff.xml
```
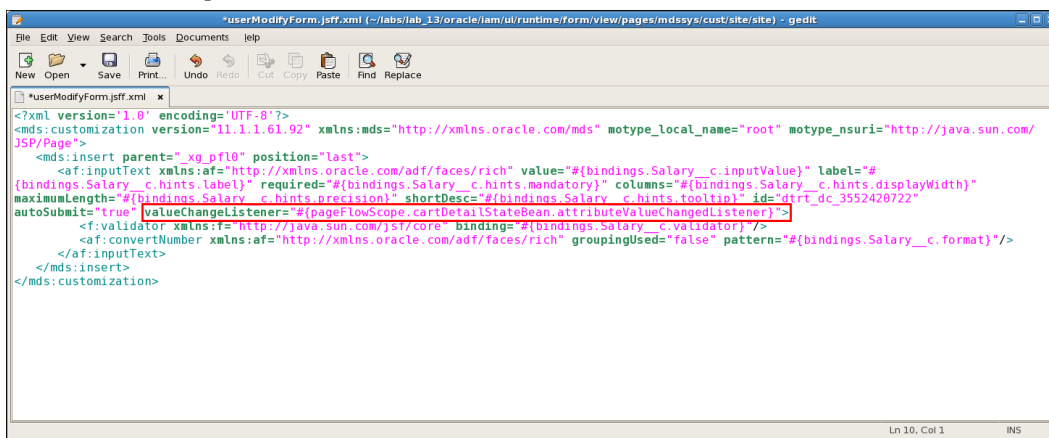
dd. Edit the `af:inputText` tag, adding the following attribute:

```
valueChangeListener="#{pageFlowScope.cartDetailStateBean.attribu
teValueChangedListener}"
```


Note: This attribute is the callback function to notify the server that the value in the Salary field has been updated, thereby enabling the Submit button on the form. This attribute is normally set in the Component Properties dialog box in the Web Composer, but due to a soon-to-be fixed defect in the version of ADF used by Oracle Identity Manager, the attribute has to be manually set in the XML in the sandbox.

ee. Save the file by selecting File > Save on the editor menu bar. Exit the editor by selecting File > Quit.

ff. Remove the backup file created by the editor by entering the following command:

```
rm
oracle/iam/ui/runtime/form/view/pages/mdssys/cust/site/site/user
ModifyForm.jsff.xml~
```

Important: The backup file has a ~ (tilde) appended to the name. Be sure to remove the correct file.

Note: If the file is not removed, the import of the sandbox file will fail.

Customizing Oracle Identity Manager

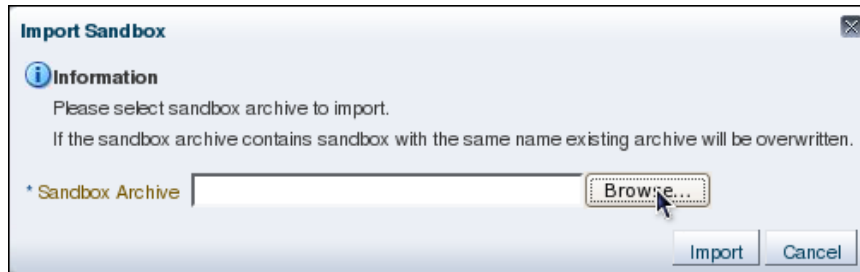gg. Repackage the sandbox file by entering the following command:

```
zip -r sandbox_Example_Corp_4a.zip oracle mdssys pageDefs
```

```
/home/oracle/sandboxes/second> zip -r sandbox_Example_Corp_4a.zip oracle mdssys
pageDefs
```
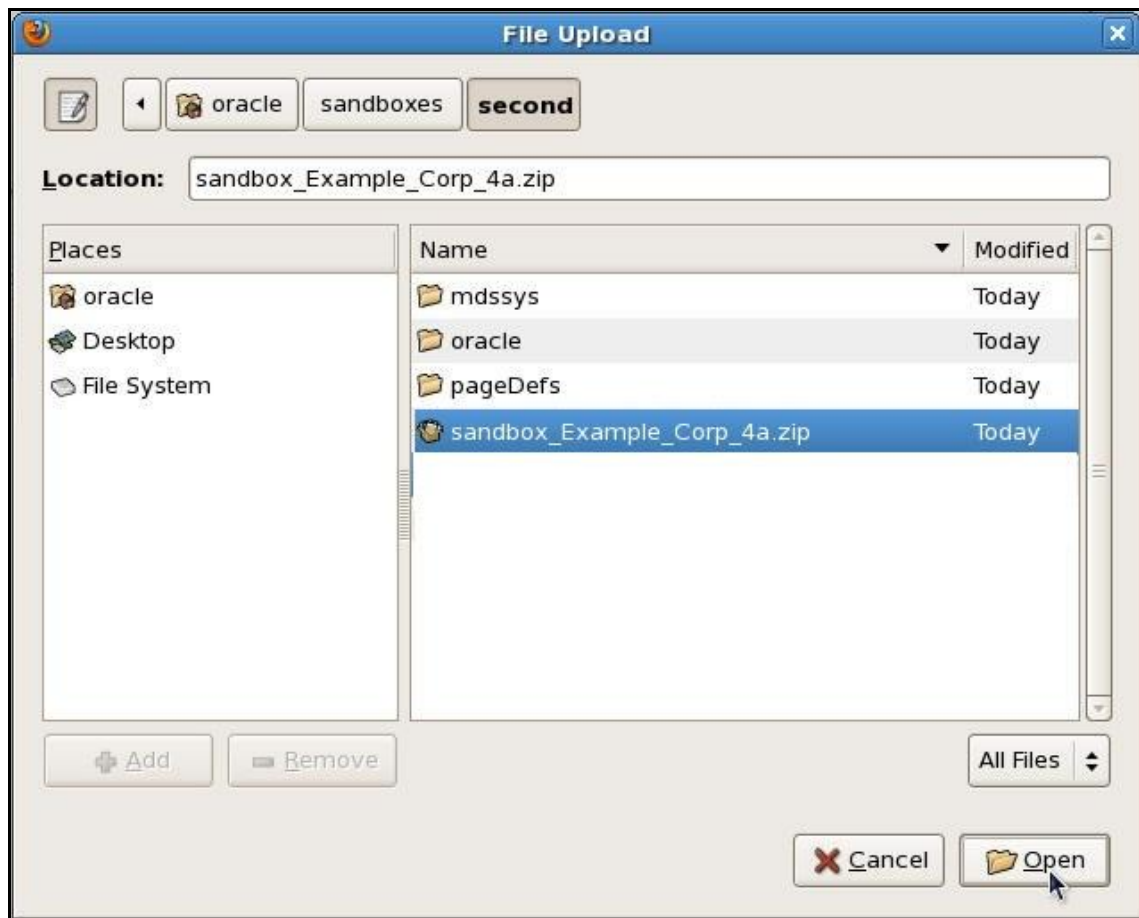
hh. Make the Firefox web browser active.

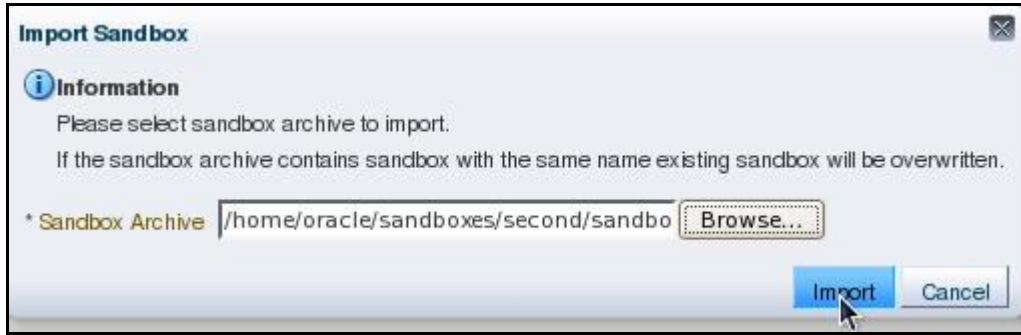ii. On the Manage Sandboxes tab, click Import Sandbox.

jj. Click Browse.
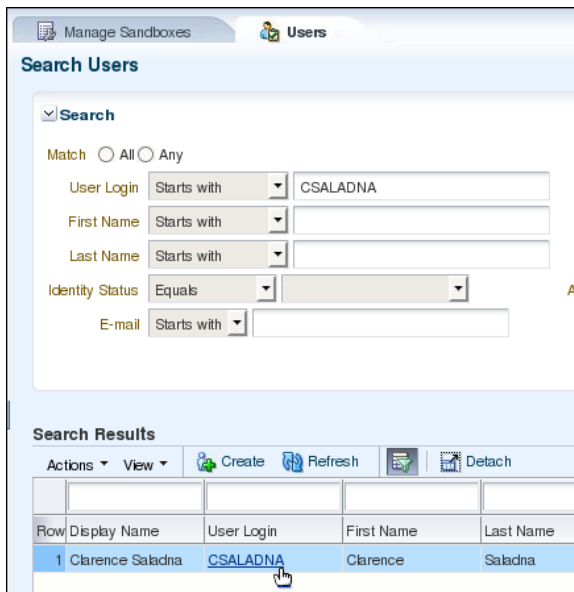

kk. Select the `sandbox_Example_Corp_4a.zip` file located in the
`/home/oracle/sandboxes/second` directory, and click Open.
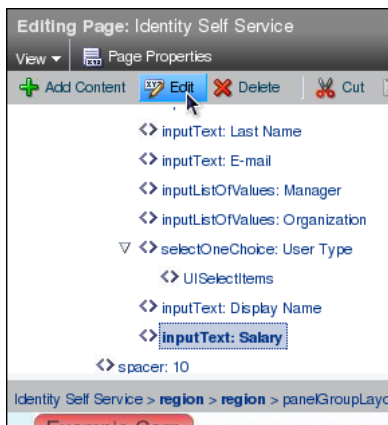
ll. Click Import.

mm. Search for and click the link for the user CSALADNA and click Modify User.

nn. Click Customize to open the Web Composer and select View > Source from the Web Composer menu.

oo. Select the "Salary inputText" component and click Edit.

pp. Verify that the `valueChangeListener` attribute is correctly updated.
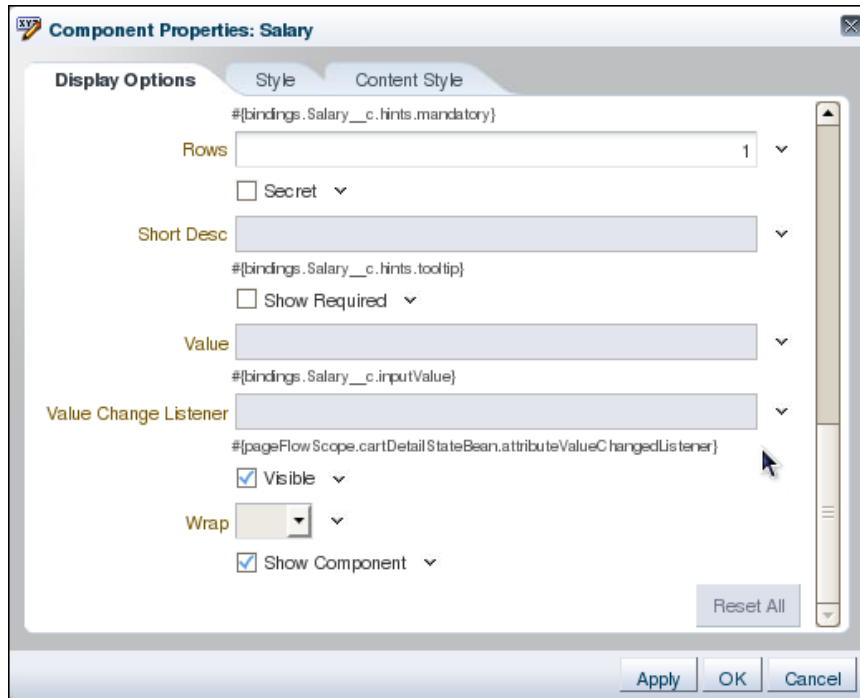
qq. Click Cancel to close the Component Properties dialog box.

rr. Close the Web Composer.

ss. Close all tabs, except the Manage Sandboxes tab.

tt. Publish the sandbox called `Example_Corp_4a`.

You have added the Salary field to the Modify User page and updated the `valueChangeListener` attribute.

4. Set the value of the attribute for the user `CSALADNA`. To do this, perform the following:

   a. Search for and click the link for the user `CSALADNA`.

   b. Click Modify User.

   c. Enter the value `1200` in the Salary field and click Apply.

   d. Close the Modify User: CSALADNA tab.

   e. On the User Details: Clarence Saladna tab, click Refresh.

   The page refreshes and the updated value is displayed in the Salary field.

   You have updated the Salary field for the user `CSALADNA`.

5. Make the field visible only to users assigned the HR Manager or System Administrator roles. To do this, perform the following:

    a. Create and activate a sandbox called `Example_Corp_4b`.

    b. Search for the user `CSALADNA` and click the user link.

    c. Click Customize to open the Web Composer.

    d. Select View > Source from the Web Composer menu.

    e. Select the "panelLabelAndMessage: Salary" component in the Web Composer and click Edit.
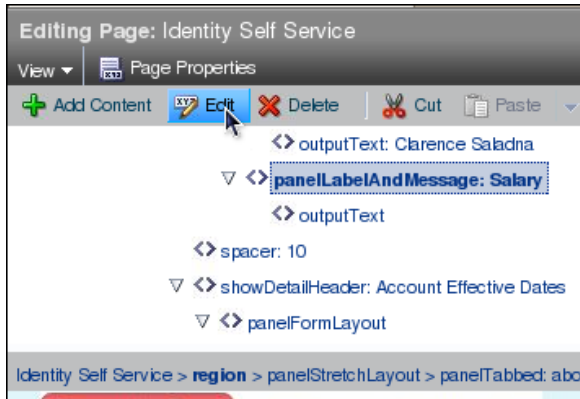
    f. Click the down arrow next to Visible and select Expression Builder.
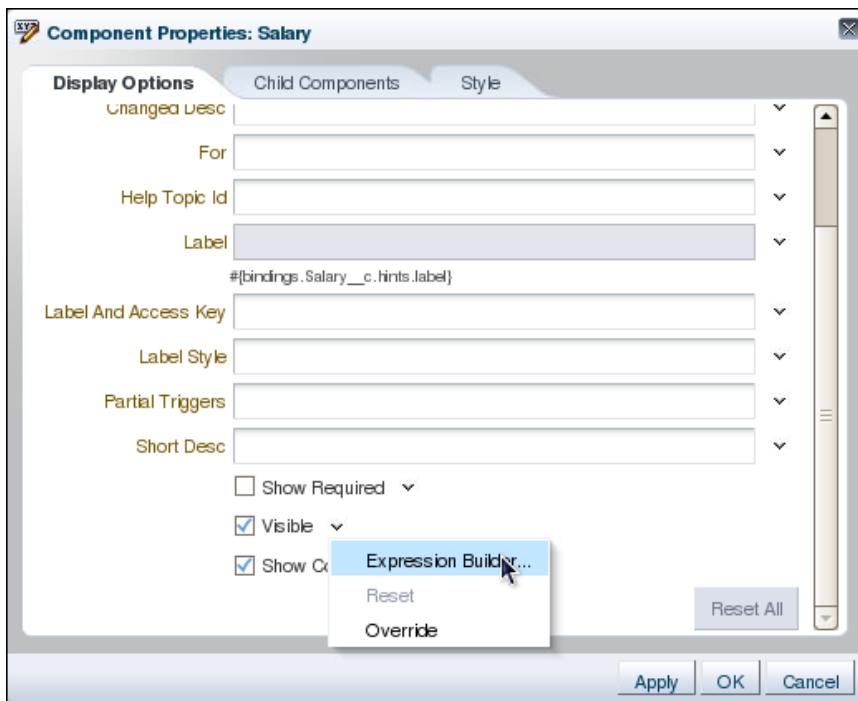
g. In the text field, replace the value `true` with the following expression and click OK.

```
#{(oimcontext.currentUser.roles['HR Manager'] !=
null)||(oimcontext.currentUser.roles['SYSTEM ADMINISTRATORS'] !=
null)}
```
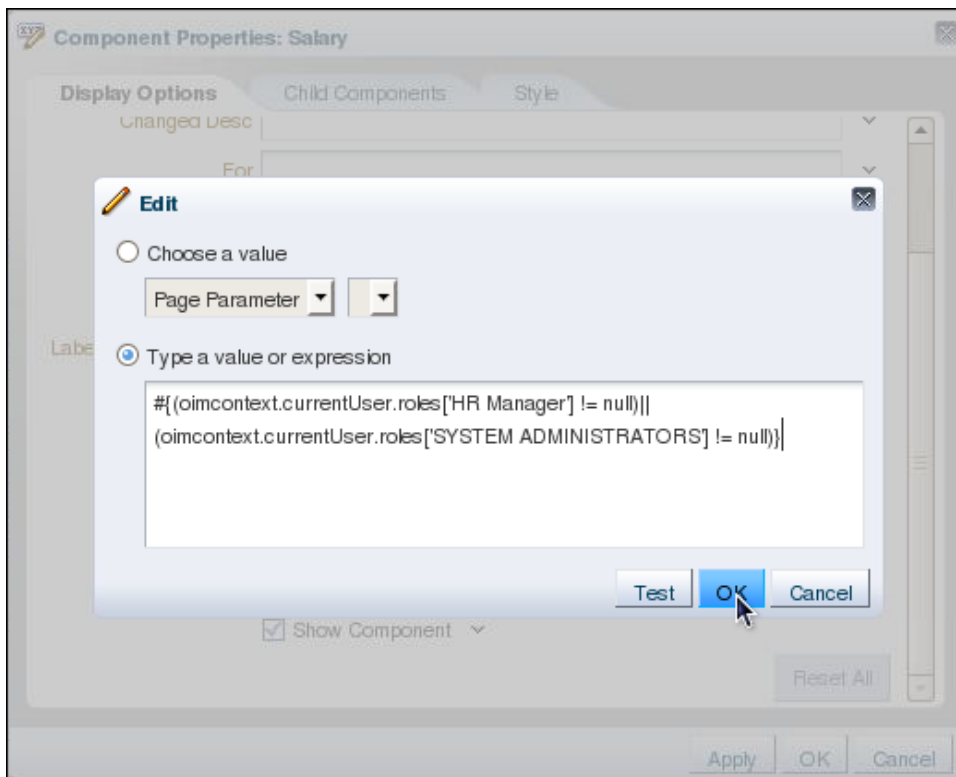

Note: This expression evaluates to `true` if the current user has the role HR Manager or the role System Administrators. Because the value of the `Visible` attribute is based on the result of the expression, the field will be visible only if the current user has one of these roles.

h. Click OK to close the Component Properties dialog box.
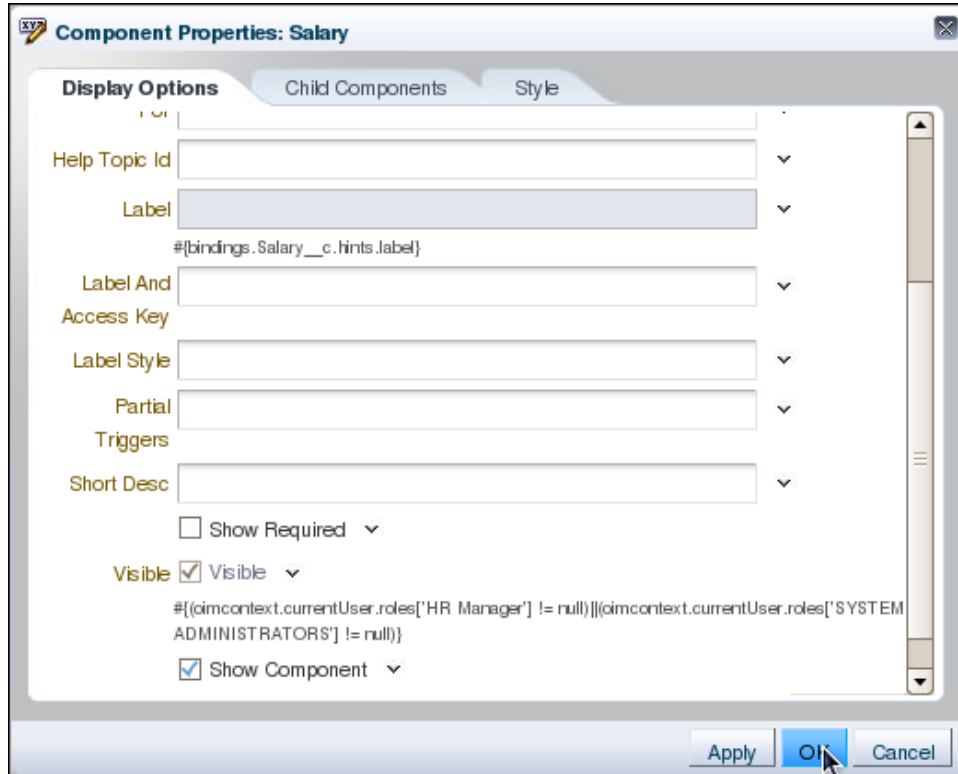
i. Close the Web Composer.

j. Click Modify User to open the Modify User page.

k. Repeat steps (e) to (i), but this time modify the "inputText: Salary" component.

l. Close all tabs, except the Manage Sandboxes tab.

m. Publish the sandbox called `Example_Corp_4b`.

n. Sign out of the Identity Self Service Console.

6. Confirm that only users with the HR Manager role are able to see the attribute. To do this, perform the following:

a. Sign in to the Identity Self Service Console as the user Teena Semmens (`TSEMMENS`).

b. Search for the user `CSALADNA` and click the user link.

c.   Verify that the `Salary` attribute is visible on the View User Details page.
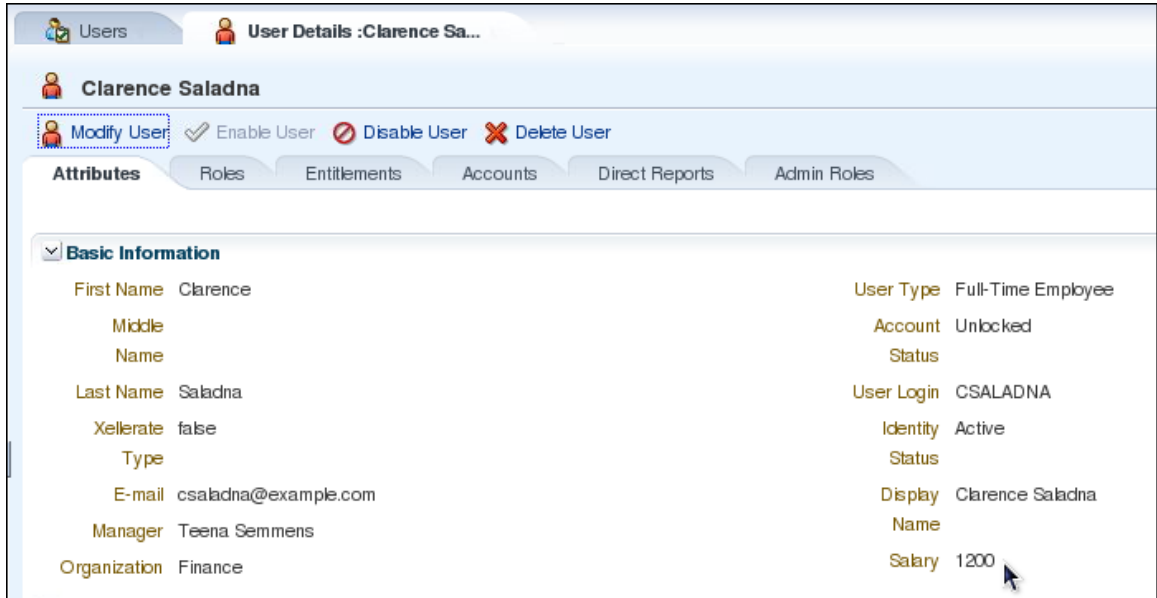
Note: Teena Semmens can see the Salary attribute because this user is assigned to the HR Manager role.

d.   Sign out of the Identity Self Service Console.

e.   Sign in to the Identity Self Service Console as the user Nancey Jepson (`NJEPSON`).

f.   Search for the user `CSALADNA` and click the user link.

g.   Verify that the attribute `Salary` is not visible on the View User Details page.
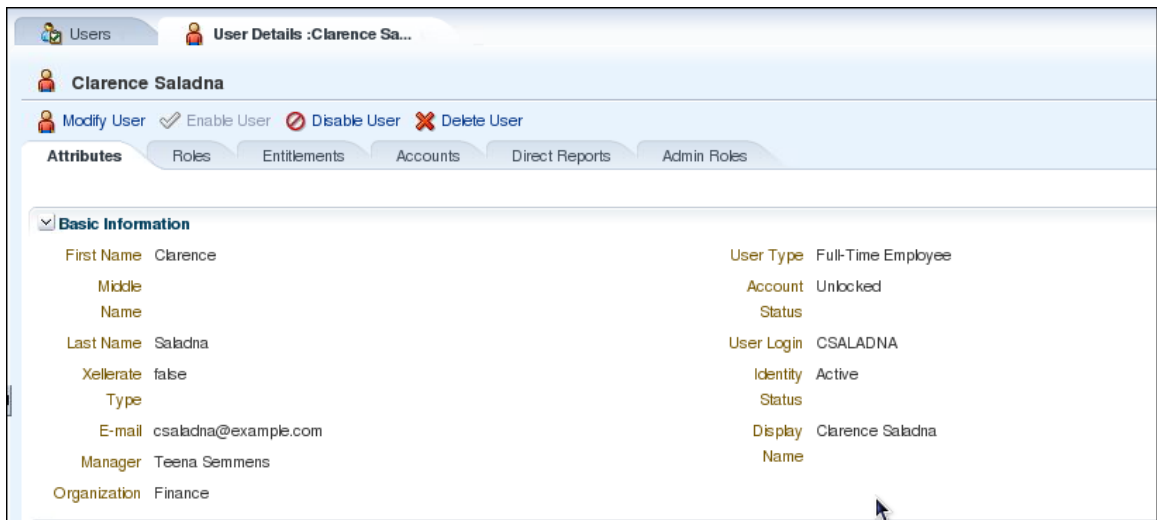
Note: The user `NJEPSON` is not assigned the HR Manager role, and so is not able to view the `Salary` attribute.

h.   Sign out of the Identity Self Service Console.

You have confirmed that the Salary field is visible only to users assigned the HR Manager role.
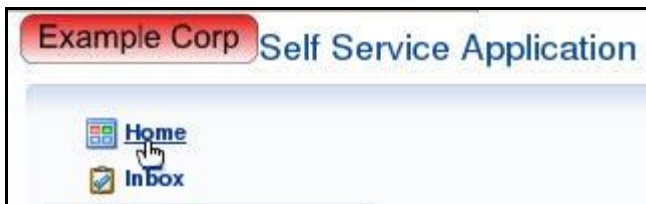
Personalizing the Home Page

Overview

The Home page provides you a snapshot of the various functions in Oracle Identity Self Service. Each function is displayed as a component of the page. You can personalize the Home page by adding and removing components, and rearranging components. In this topic, you:
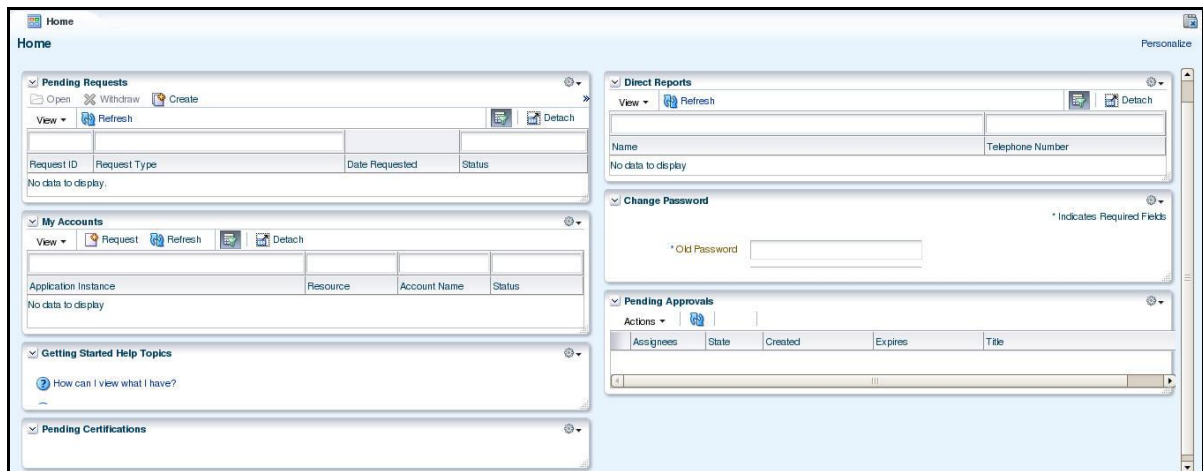
- Remove the Direct Reports and Pending Approvals components from the Home page
- Move the Getting Started Help Topics component

Tasks

1. Sign in to the Identity Self Service Console as the `xelsysadm` user.

2. Click the Home link.
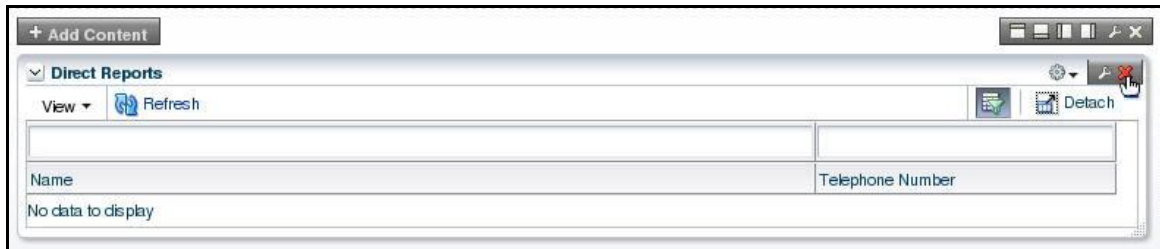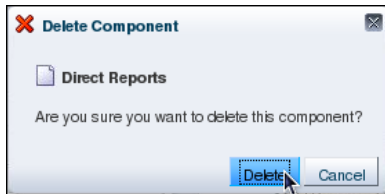

   The Home page is displayed.
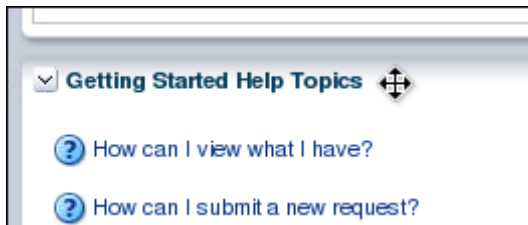

3. Click the Personalize link.

4. Remove the Direct Reports component. To do this, perform the following:

   a. Click the Close icon (❌) on the top-right corner of the Direct Reports component.

   b. Click Delete to confirm deletion of the container.

5. Follow the instructions in step 4 of this topic to remove the Pending Approvals component.

6. Move the Getting Started Help Topics component to the column on the right. To do this, perform the following:

   a. Position the cursor over the top border of the Help Topics component. The cursor changes to a four-way arrow.

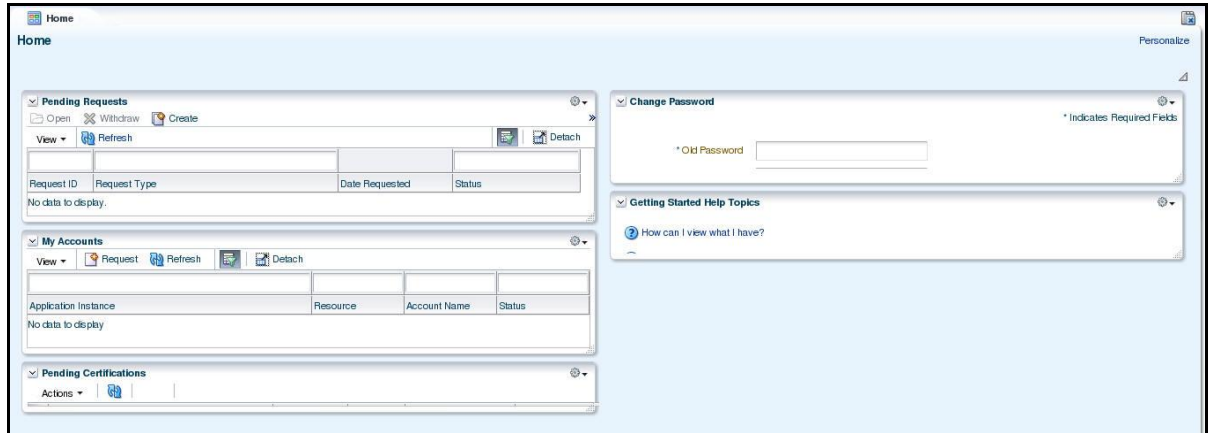   b. Drag the component to a location below the Change Password component.

Customizing Oracle Identity Manager
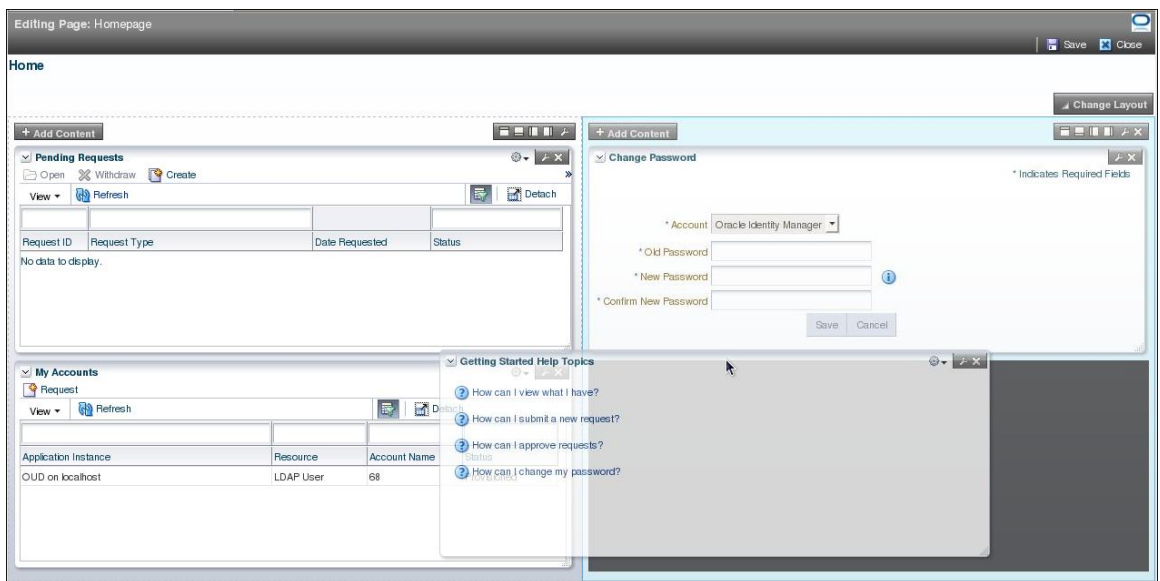
7. Click Close.
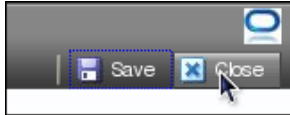
The personalized Home page is displayed.

You have personalized the Home page.

8. Sign out of the Identity Self Service Console.

Personalizing Search Results

Overview

In this topic, you perform the following:

- Change the sort order of a result table
- Manage the displayed columns in a result table
- Save search filters and result layouts for later use

Tasks

1. Change the sort order of a result table. To do this, perform the following:

   a. Sign in to the Identity Self Service Console as the `xelsysadm` user.

   b. Click Users under Administration.

   c. On the Search Users tab, enter `Finance` in the Organization field. Click Search.

The search results now list only the users in the Finance organization.

You have used search criteria to search for users in the Finance organization.

d. Move your cursor over the User Login header in the result table and click Sort Descending.

The results are now sorted by the User Login field, in descending order.

e. To sort in ascending order for any displayed column, move your cursor over the header in the result table and click Sort Ascending.

You have sorted the results in the result table.

2. Remove the Display Name, Telephone Number, and Organization columns from the result table. To do this, perform the following:

a. Select View > Columns > Manage Columns from the Search Results menu bar.
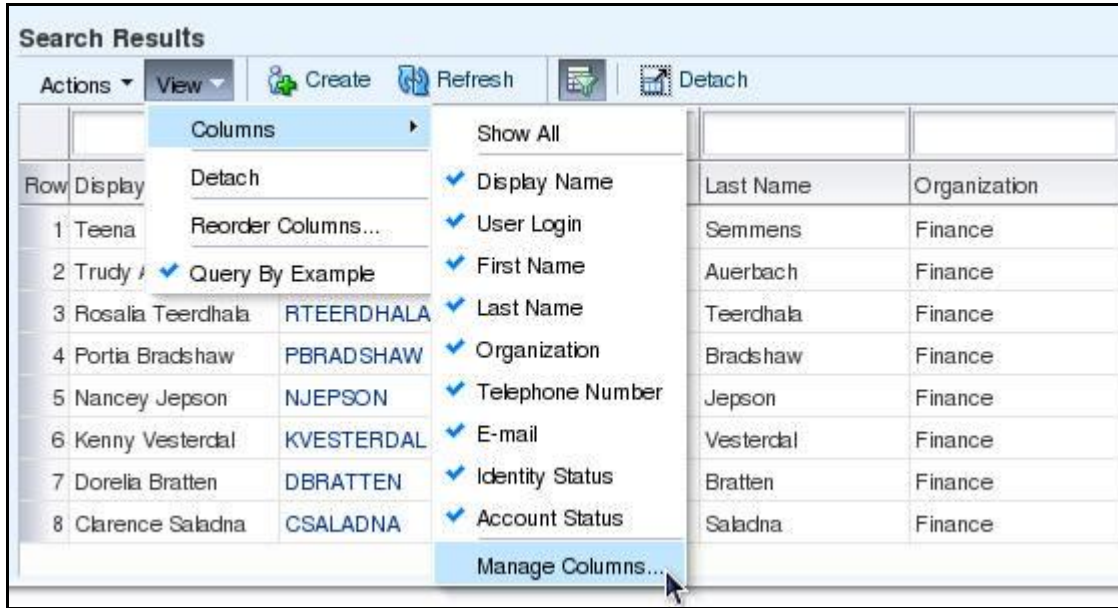
b. Select Display Name in the Visible Columns list and click [icon] to move the selection to the Hidden Columns list.

Customizing Oracle Identity Manager
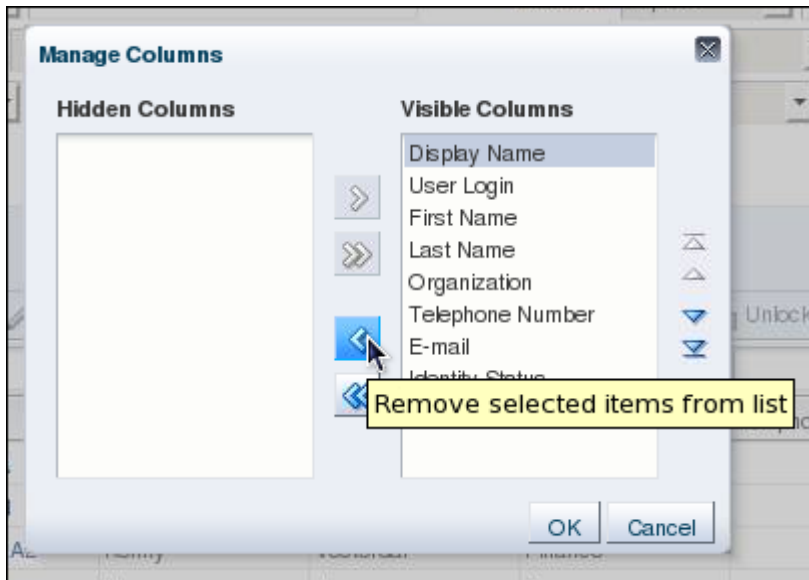
c. Do the same for Telephone Number and Organization, and click OK.

The result table is updated.

You have removed the Display Name, Telephone Number, and Organization columns from the result table.

3. Save the search for future use. To do this, perform the following:

   a. Click Save.

   b. The Create Saved Search dialog box appears. Enter `Finance Users` in the Name field. Deselect the "Set as Default" and Run Automatically options. Select the Save Results Layout option. Click OK.
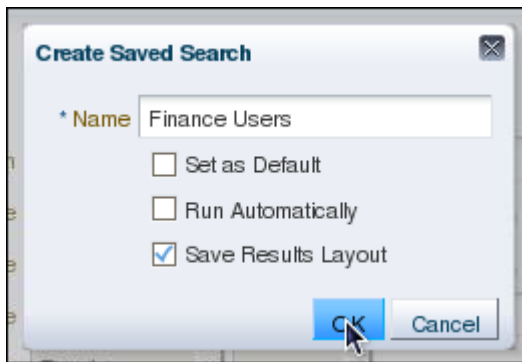
   Note: You deselect the "Set as Default" check box to ensure that the search you are saving is not the default search for this type of Oracle Identity Manager entity. For this example, you do not want Finance Users to be the default search for users.

   You deselect the Run Automatically check box to ensure that an administrator must run the saved search manually (by clicking the Search button).

   You select the Save Results Layout check box to ensure that the results table of the saved search does not have the Display Name, Telephone Number, or Organization columns.

   c. Select Search User from the Saved Search drop-down list and click Search. All users are listed in the result table.

   Note: All columns are displayed in the result table.

d. Select Finance Users from the Saved Search drop-down list and click Search.
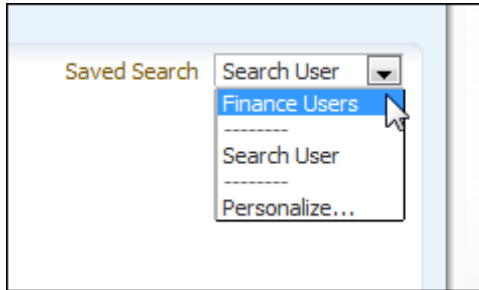
The search results contain only the users in the Finance organization, and the results table does not have the Display Name, Telephone Number, or Organization columns.

You have saved the query and the result layout into a Saved Search called "Finance Users."

4. Use Query By Example to search for user records. To do this, perform the following:

a. Select Search User from the Saved Search drop-down list.
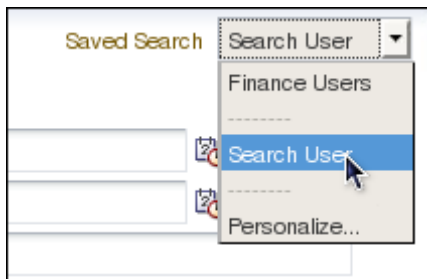
b. Make sure that Query By Example is selected in the View menu.

c.   In the text entry field above the Last Name column, enter s and press Enter.

Row	Display Name	User Login	First Name	Last Name	Organizati
				s	
1	Clarence Saladna	CSALADNA	Clarence	Saladna	Finance
2	Dorelia Bratten	DBRATTEN	Dorelia	Bratten	Finance
3	Kenny Vesterdal	KVESTERDAL	Kenny	Vesterdal	Finance
4	Nancey Jepson	NJEPSON	Nancey	Jepson	Finance
5	Portia Bradshaw	PBRADSHAW	Portia	Bradshaw	Finance
6	Rosalia Teerdhala	RTEERDHALA	Rosalia	Teerdhala	Finance
7	Trudy Auerbach	TAUERBACH	Trudy	Auerbach	Finance

The list of results is refreshed to display only those records with a Last Name that begins with "s."

Row	Display Name	User Login	First Name	Last Name	Organization	Telephone Number	E-mail	Identity Status	Account Status
				s					
1	Teena Semmens	TSEMMENS	Teena	Semmens	Finance		tsemmens@example	Active	Unlocked
2	Clarence Saladna	CSALADNA	Clarence	Saladna	Finance		csaladna@example.c	Active	Unlocked

You have used Query By Example to search for user records.

Customizing Oracle Identity Manager

Renaming Panel Text

Overview

In this topic, you change the name of a panel in the Search Users form (from Search to Find).

Tasks

1. Sign in to the Identity Self Service Console as the `xelsysadm` user.

2. Create and activate a sandbox called `Example_Corp_7`.

3. Click Users under Administration. The Search Users form appears.

Note: The top-most panel in the Search Users form is Search. For this topic, you are to change the name of the Search panel to Find.

4. Click Customize to open the Web Composer.

5. Select View > Source from the Web Composer menu.

6. Select the Search panel of the Search Users form (a blue border should appear around the panel).
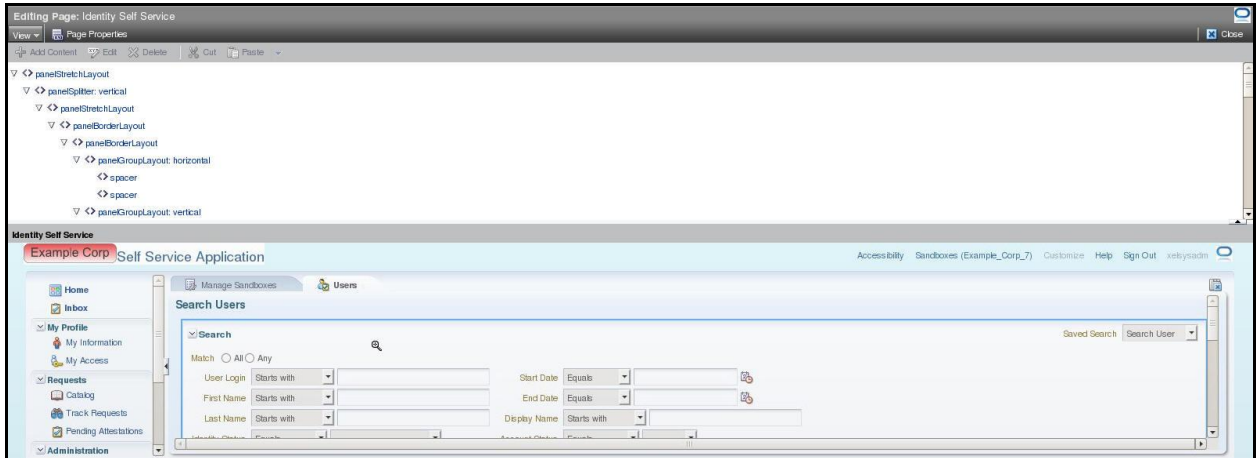
7. On the Confirm Task Flow Edit window, click Edit.
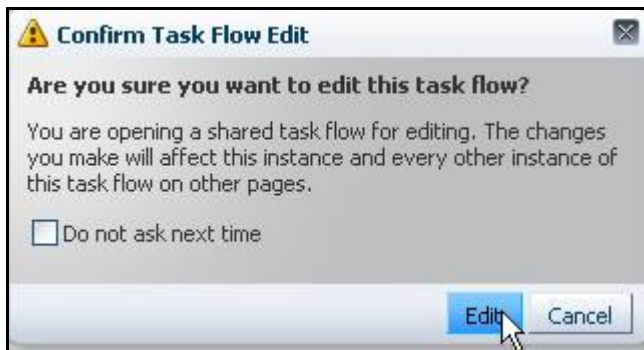
8. On the Editing Page page, click Edit.
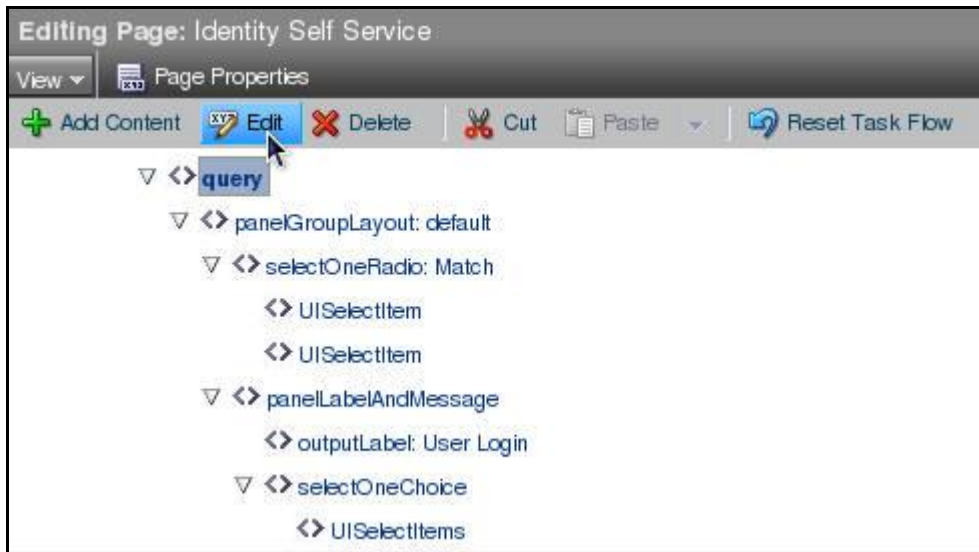
9. On the Component Properties window, click the Down Arrow button to the right of the Header Text field. Select Expression Builder from the popup menu that appears.
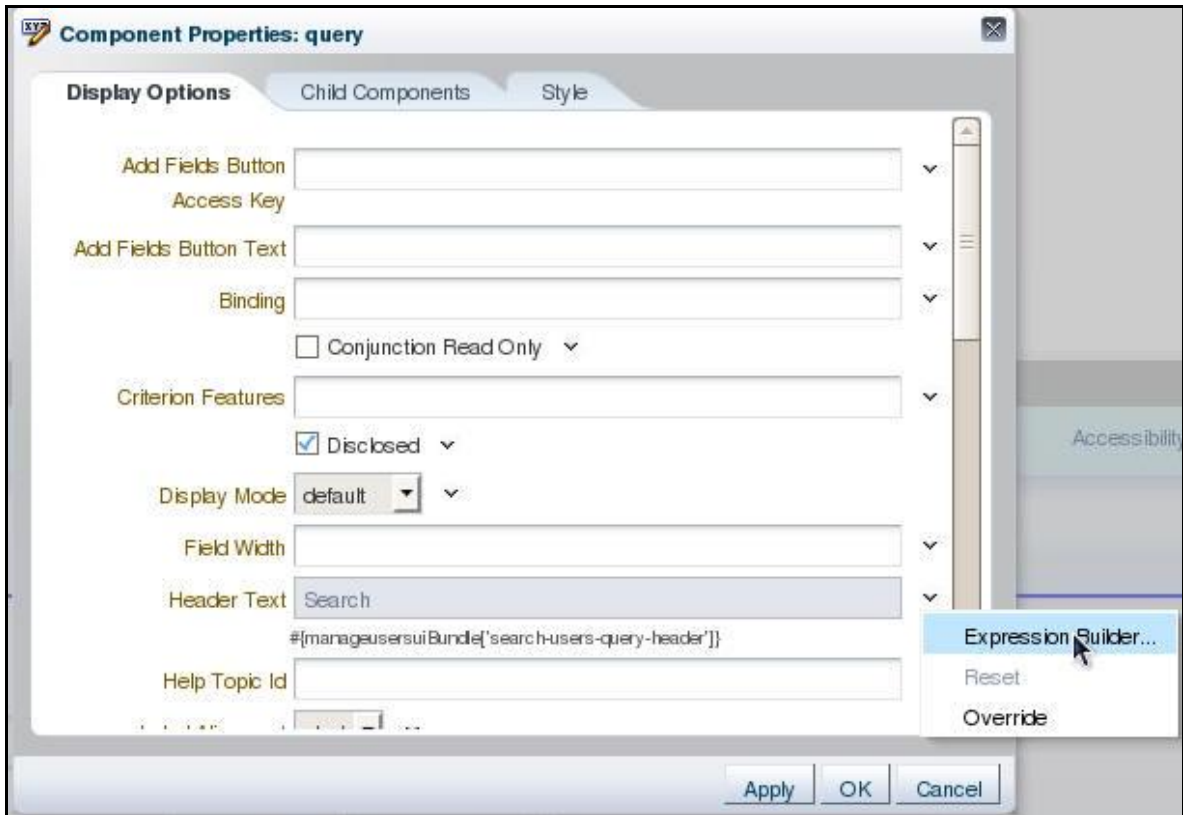
10. In the Edit window, select the Type a value or expression option. In the text area below the option, enter **Find**. Click OK.
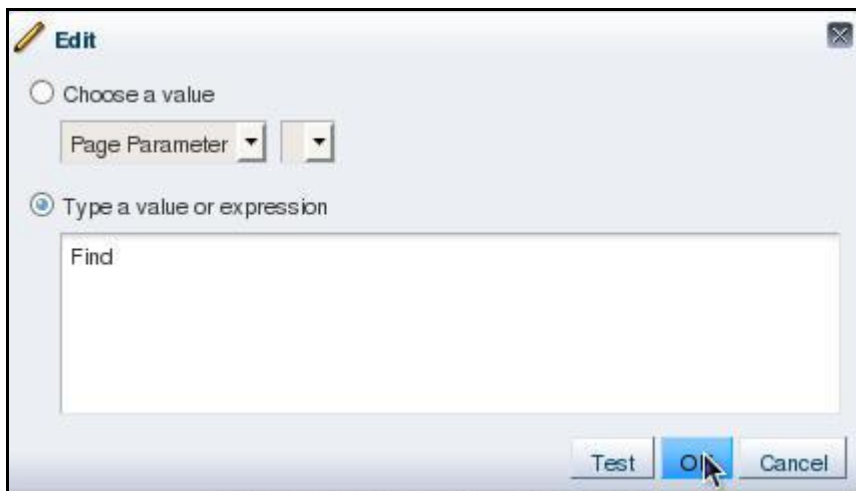
Note: You enter **Find** in the text area because, in this topic, you are changing the name of a panel in the Search Users form (from Search to Find).

11. Click OK.
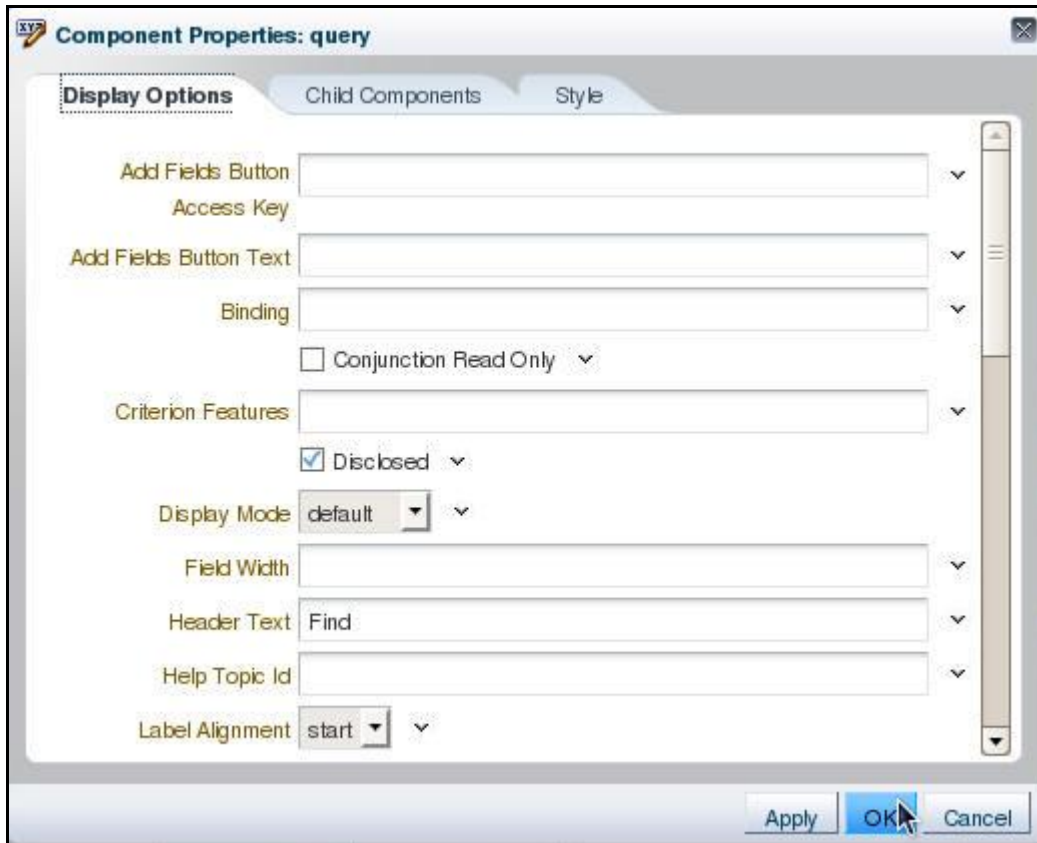
You changed the name of a panel in the Search Users form (from Search to Find).

12. Click Close (to close the Web Composer).
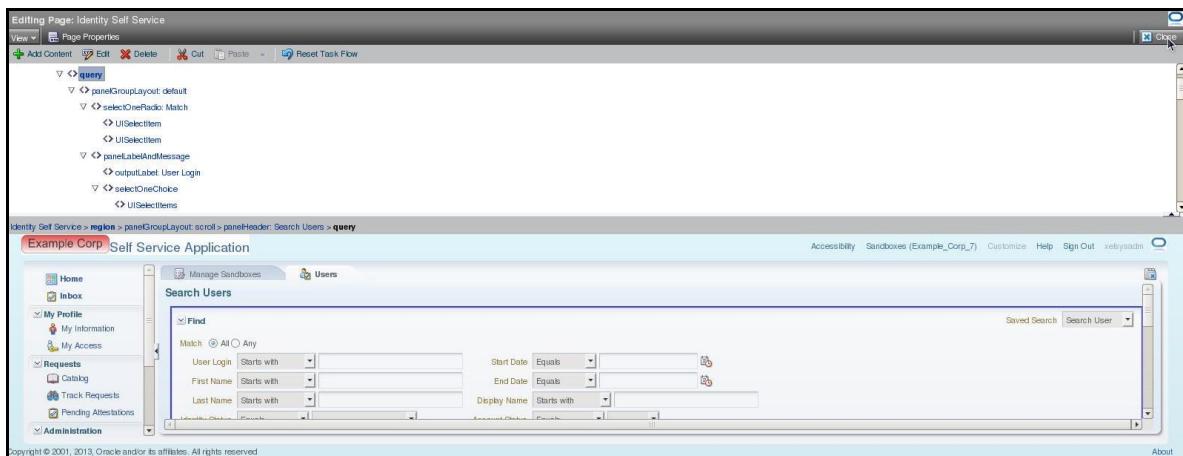
13. Close the Users tab.

14. Publish the `Example_Corp_7` sandbox.

15. Verify that the change you made to the Search panel in the Search Users form took effect. To do so, click Users under Administration. The Search Users form appears.

You changed the name of a panel in the Search Users form (from Search to Find).

Customizing Oracle Identity Manager

Customizing Console Menus

Overview

In this topic, you organize, rename, and hide menus for the Identity Self Service Console. Specifically, you:

- Organize the My Profile menu of the console so that the My Access item and My Information item swap places. As a result, the My Access menu item is to appear first and the My Information menu item is to appear second.

- Change the name of the Requests menu (to My Requests)

- Hide the Administration menu

Tasks

1. Sign in to the Identity Self Service Console as the xelsysadm user.

2. Create and activate a sandbox called Example_Corp_8.

3. Click Customize to open the Web Composer.

4. Select View > Source from the Web Composer menu.

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5. Select the My Profile menu of the console (a blue border should appear around the menu).
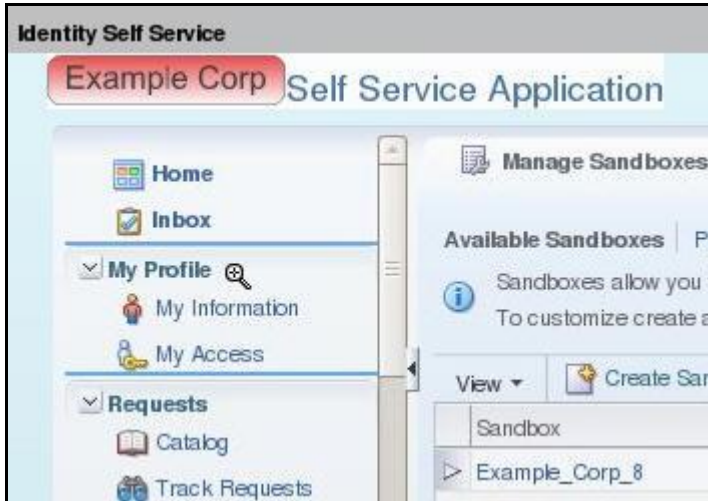
Note: You select the My Profile menu because, for this procedure, you are restructuring the menu so that the My Access menu item and My Information menu item swap places.

6. On the Confirm Task Flow Edit window, click Edit.
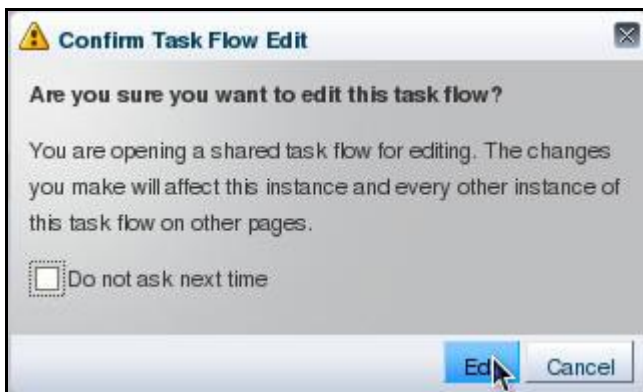
7. In the Web Composer pane, select panelGroupLayout: vertical.
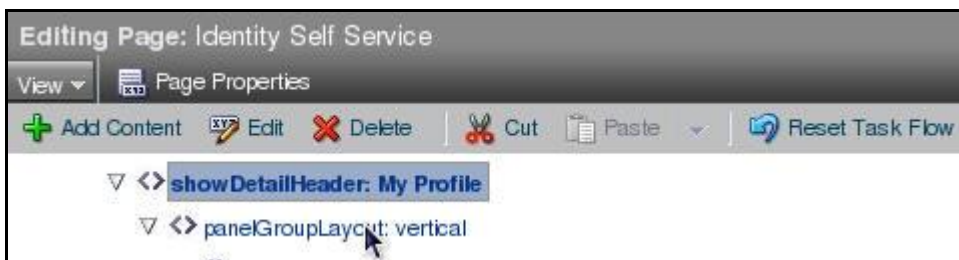
Note: You select panelGroupLayout: vertical because you are changing the layout of the group of items in the My Profile menu (which appears vertically on the Identity Self Service Console).

Customizing Oracle Identity Manager

8. On the Editing Page page, click Edit.
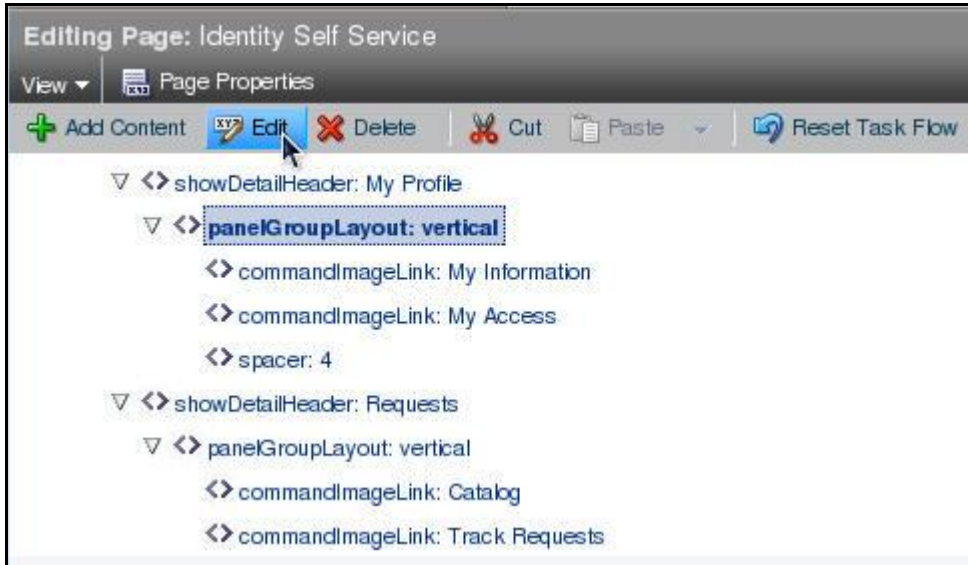
9. On the Component Properties window, click the Child Components tab.

Customizing Oracle Identity Manager
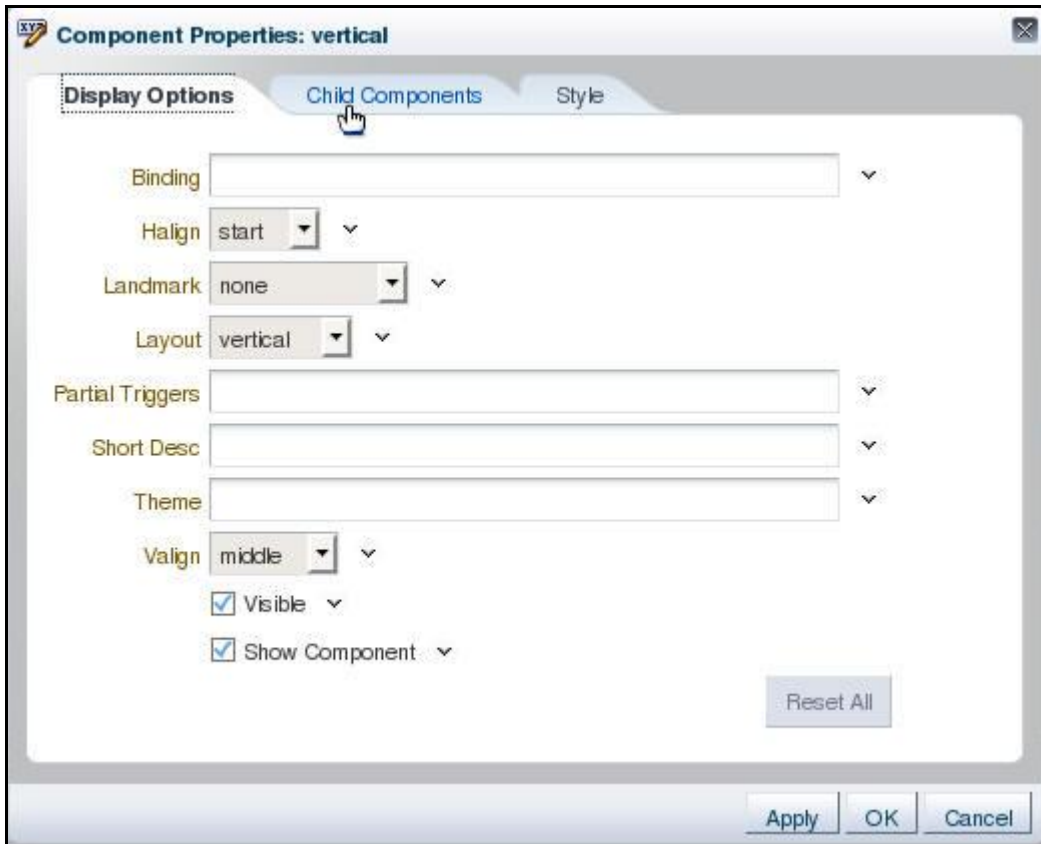
10. Click the blue arrow button to the right of the My Access item.
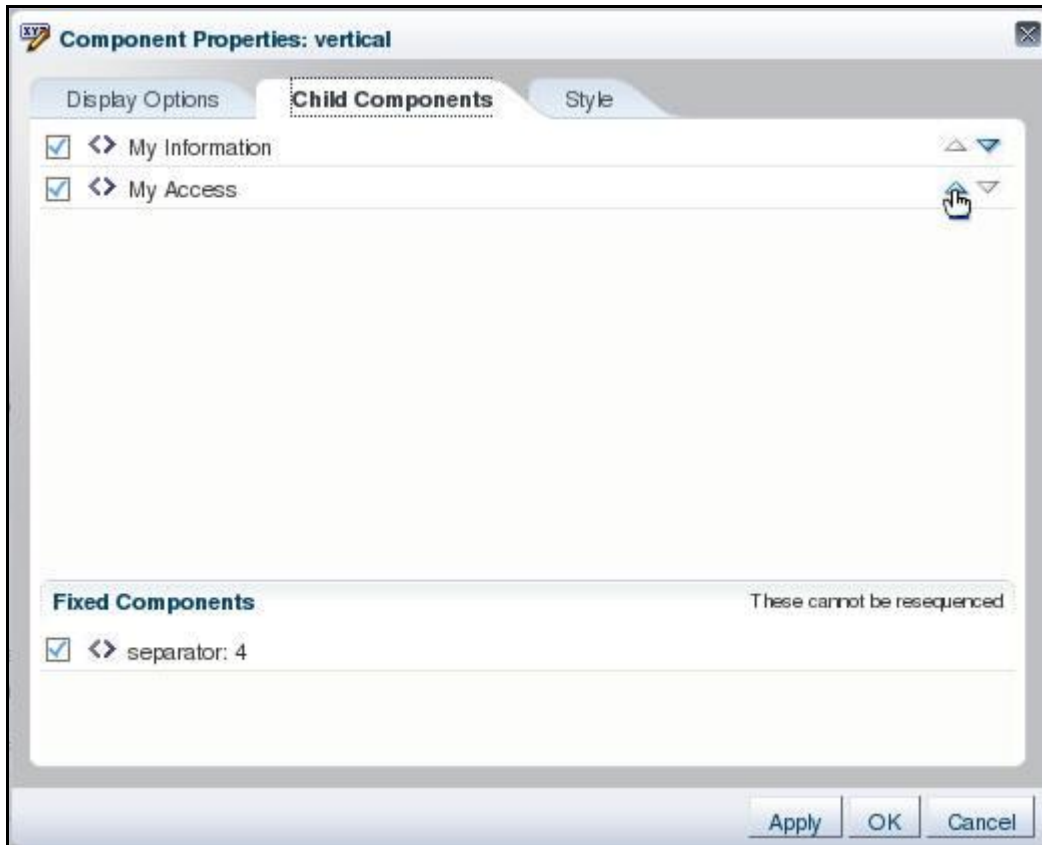
Note: You click the blue arrow button because you want the My Access item and My Information item to swap places.

The My Access menu item appears first and the My Information menu item appears second.
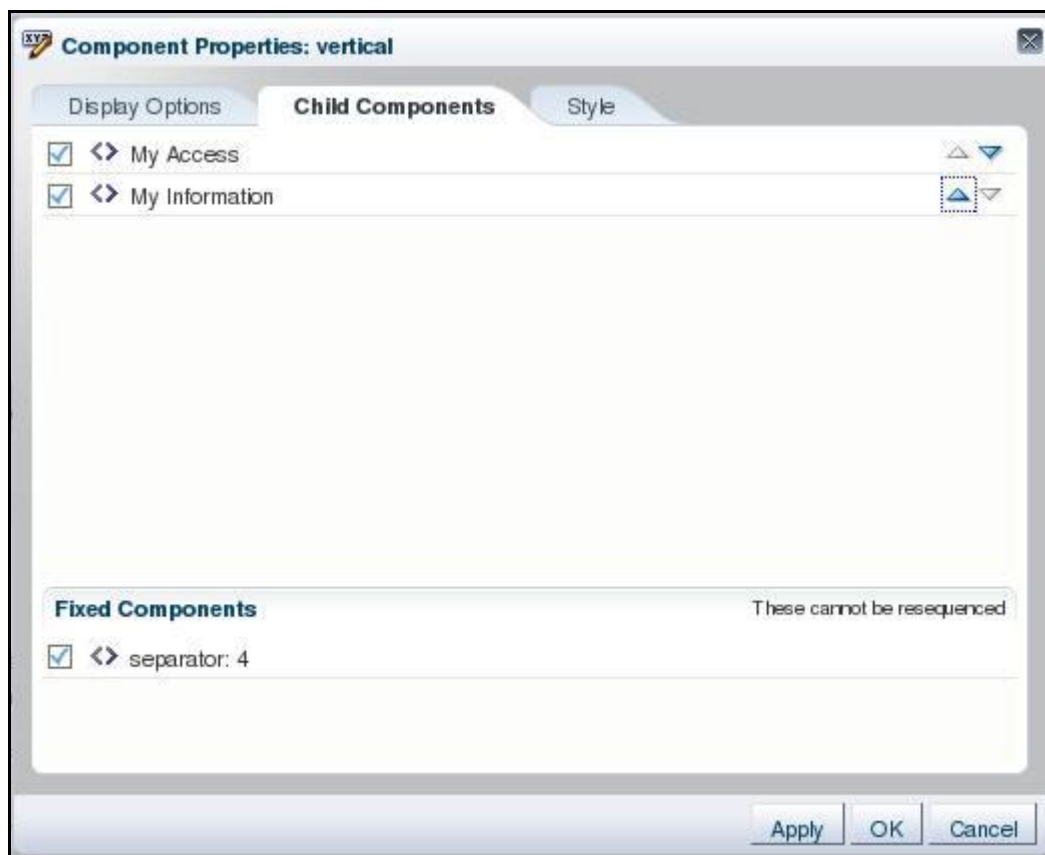
11. On the Component Properties window, click Apply. Click OK.

You organized the My Profile menu of the Oracle Identity Manager Identity Self Service Console. You are ready to change the name of the Requests menu of this console to My Requests.

12. Select the Requests menu of the console (a blue border should appear around the menu).

13. On the Editing Page page, click Edit.

14. On the Component Properties window, click the Down Arrow button to the right of the Text field. Select Expression Builder from the popup menu that appears.
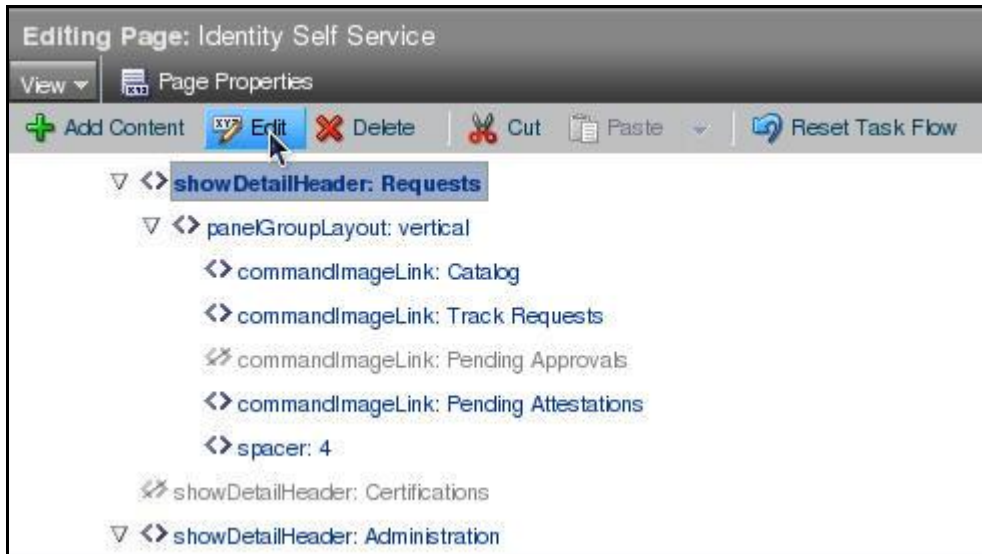
15. In the Edit window, select the Type a value or expression option. In the text area below the option, enter **My Requests**. Click OK.

   Note: You enter **My Requests** in the text area because, in this topic, you are changing the name of a menu (from Requests to My Requests).

16. On the Component Properties window, click Apply. Click OK.

   You change the name of a menu of the Oracle Identity Manager Identity Self Service Console (from Requests to My Requests).

   You are ready to hide the Administration menu of this console.

17. Select the Administration menu of the console (a blue border should appear around the menu).
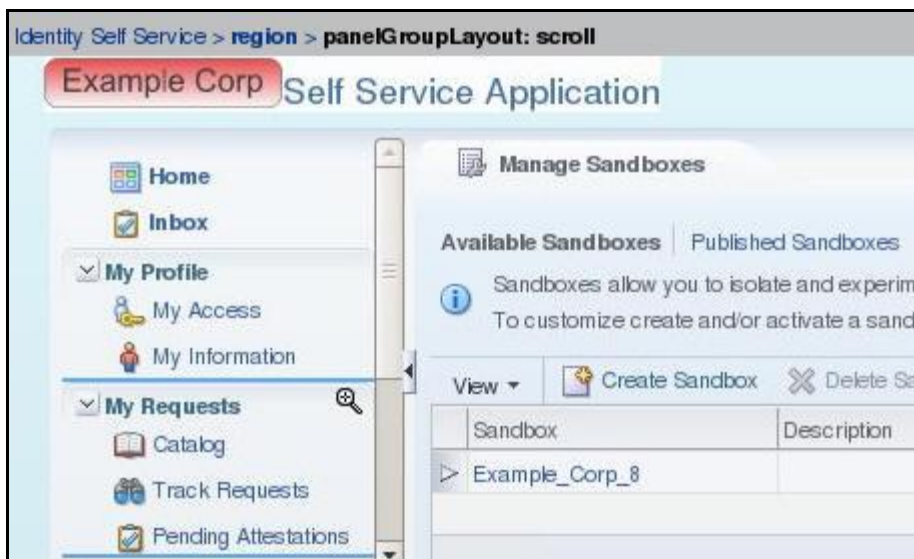
18. On the Editing Page page, click Edit.

Customizing Oracle Identity Manager

19. On the Component Properties window, deselect the Show Component check box.
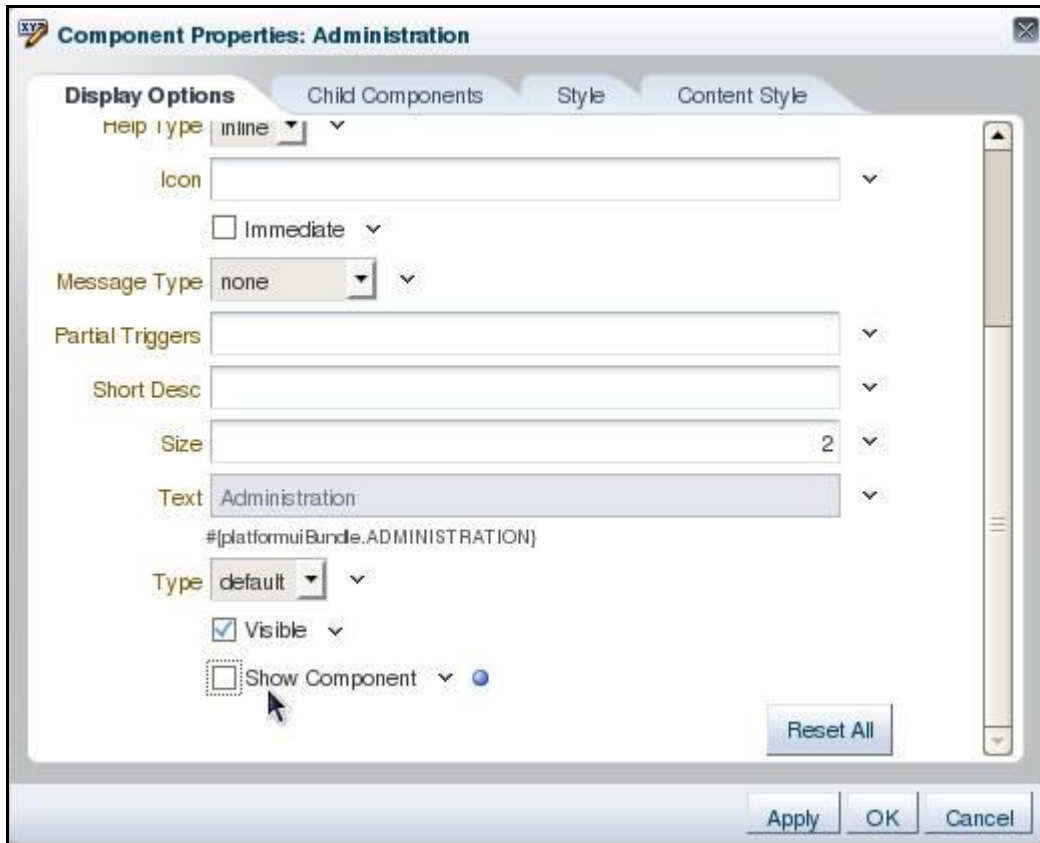
Note: You deselect the check box because, in this topic, you are hiding the Administration menu of the Oracle Identity Manager Identity Self Service Console.

20. On the Component Properties window, click Apply. Click OK.

21. On the Editing Page page, click Close.

22. Publish the Example_Corp_8 sandbox.

23. Verify that the changes you made to the My Profile, Requests, and Administration menus of the Identity Self Service Console took effect.

In the My Profile menu, the My Access item appears first and the My Information item appears second. You restructured the My Profile menu of the console so that the two menu items swapped places.

Also, notice that the Requests menu appears as My Requests, and that the Administration menu no longer appears on the console.

You organized, renamed, and hid menus on the Identity Self Service Console.

Customizing Oracle Identity Manager

Adding a User-Defined Field (UDF) to a Console Page

Overview

For Oracle Identity Manager 11gR2 PS1, you create, modify, and customize user defined fields (UDFs) through the ADF Business Editor. This tool is available through the Identity System Administration Console of Oracle Identity Manager.

In this topic, you add the SS Number UDF as a text field to the Basic User Information page.
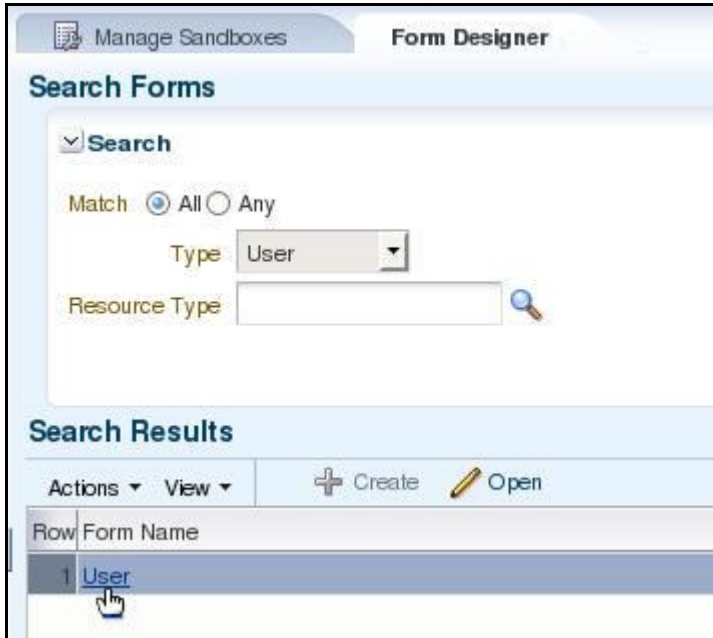
Tasks

1. Make the Identity System Administration Console active.

2. Sign in to the Identity System Administration Console as the `xelsysadm` user.

3. Create and activate a sandbox called `Example_Corp_9`.

4. On the Home page of the Identity System Administration Console, click the Form Designer link (located in the left-hand pane).
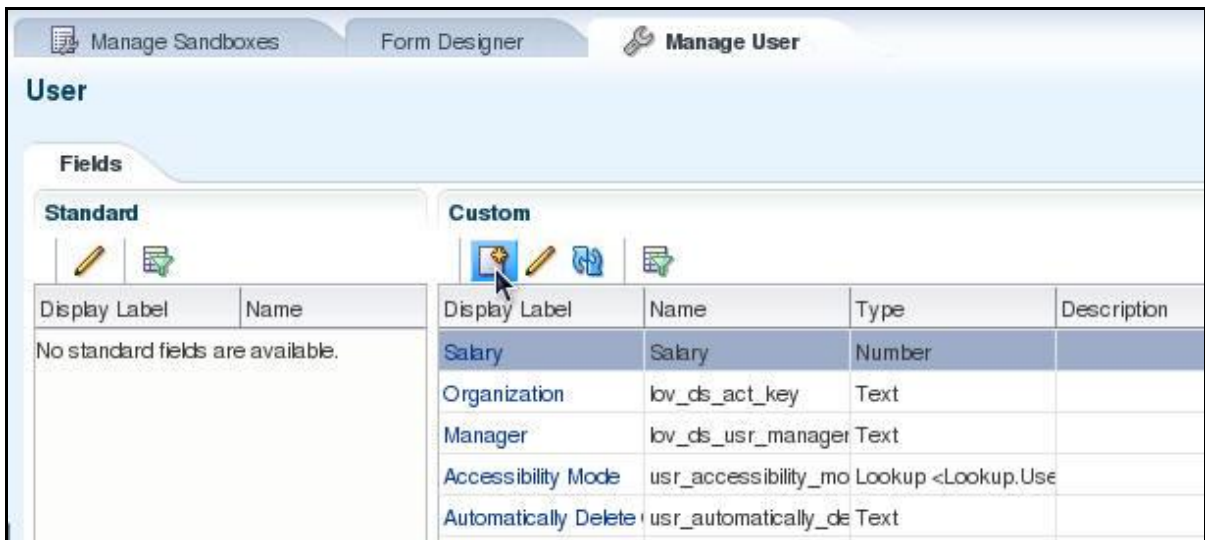

5. On the Form Designer page, select User from the Type drop-down menu. Click Search.

6. From the search results that appear, click the User link.

7. On the User page, click Create a custom field.

8. On the Select Field Type window, select the Text option. Click OK.

9. Populate the fields of the Create Text Field page, as indicated in the following screenshot (and click Save and Close):

10. Publish the `Example_Corp_9` sandbox.

11. Make the Identity Self Service Console active.

12. If prompted, sign in to the Identity Self Service Console as the `xelsysadm` user.

13. Create and activate a sandbox called `Example_Corp_9a`.

14. On the Home page of the Identity Self Service Console, click the My Information link (located in the left-hand pane).


**Note:** If an error message appears, complete the following steps:

a. Close the tab that contains the Identity Self Service Console.

b. Make the console active.

c. Sign in to the console as the `xelsysadm` user.

d. Activate the `Example_Corp_9a` sandbox.

e. Click the My Information link.

15. Click Customize to open the Web Composer.

16. Select the View menu. Then, select Source from the drop-down menu that appears.
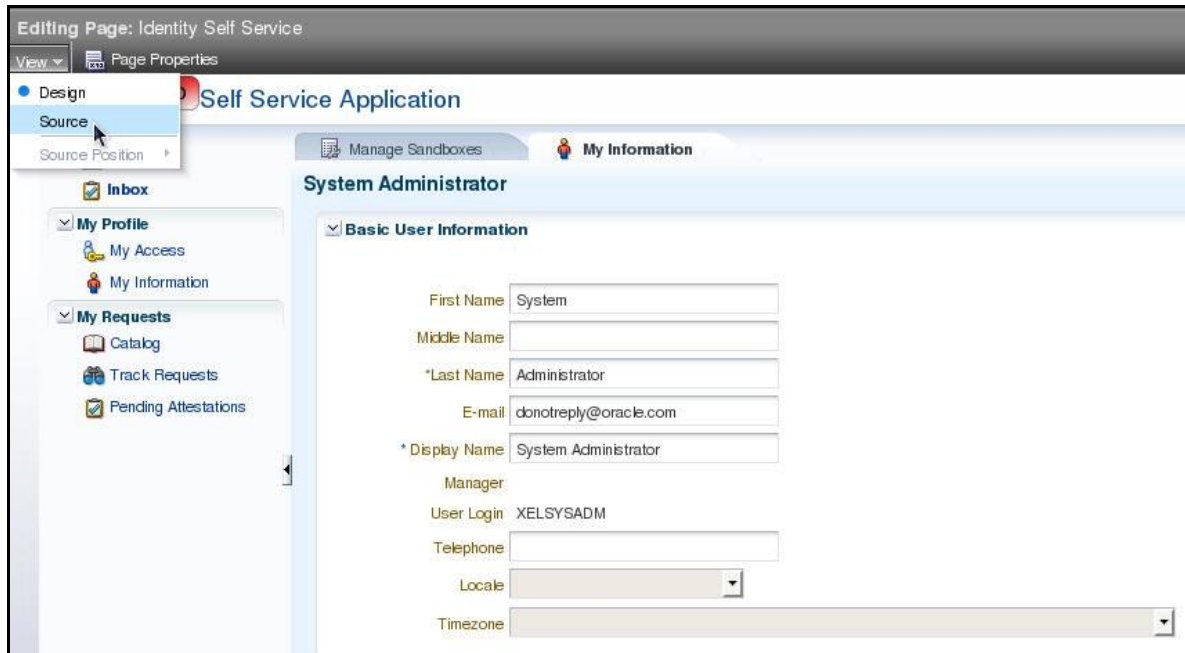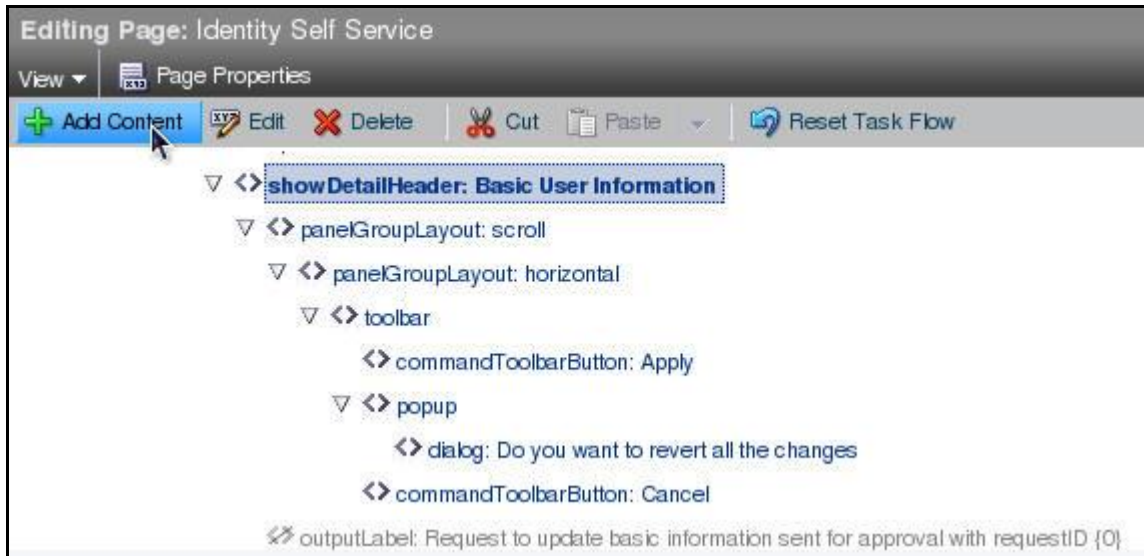

17. Select the Basic User Information page (a blue border should appear around the content of this page). On the Confirm Task Flow Edit window, click Edit.
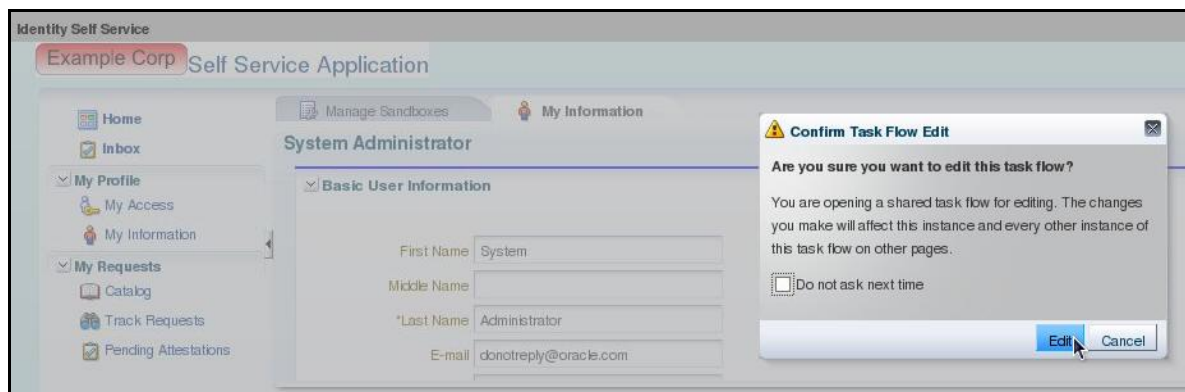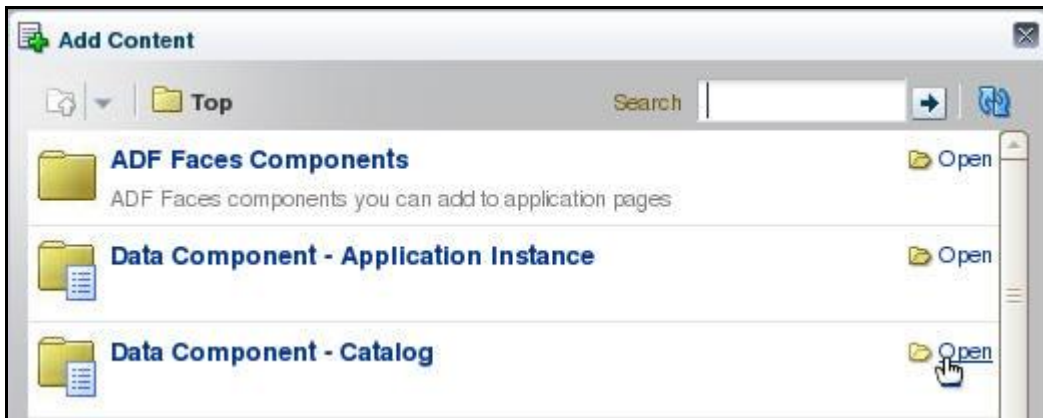

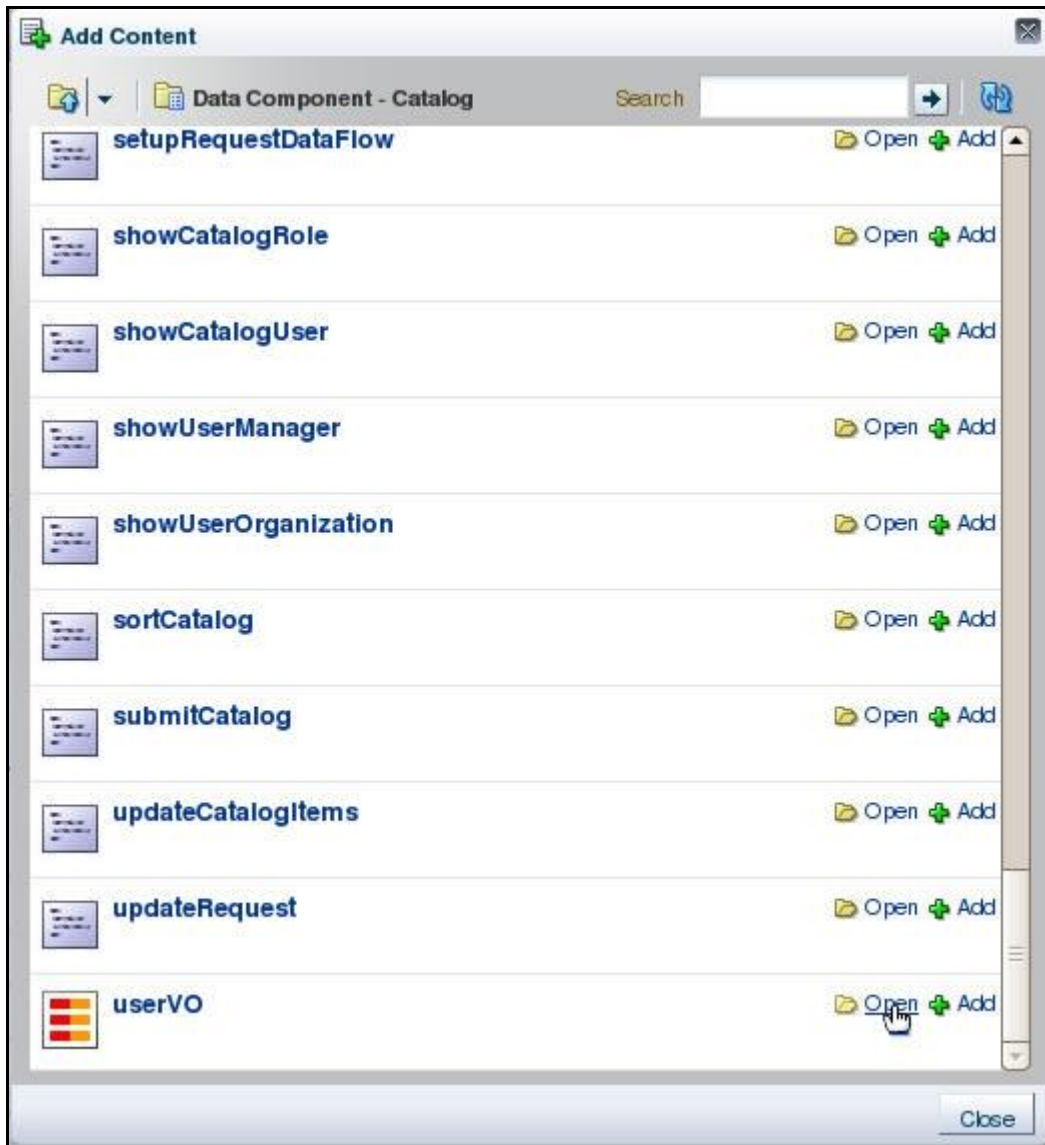**Note:** The Confirm Task Flow Edit window appears automatically.

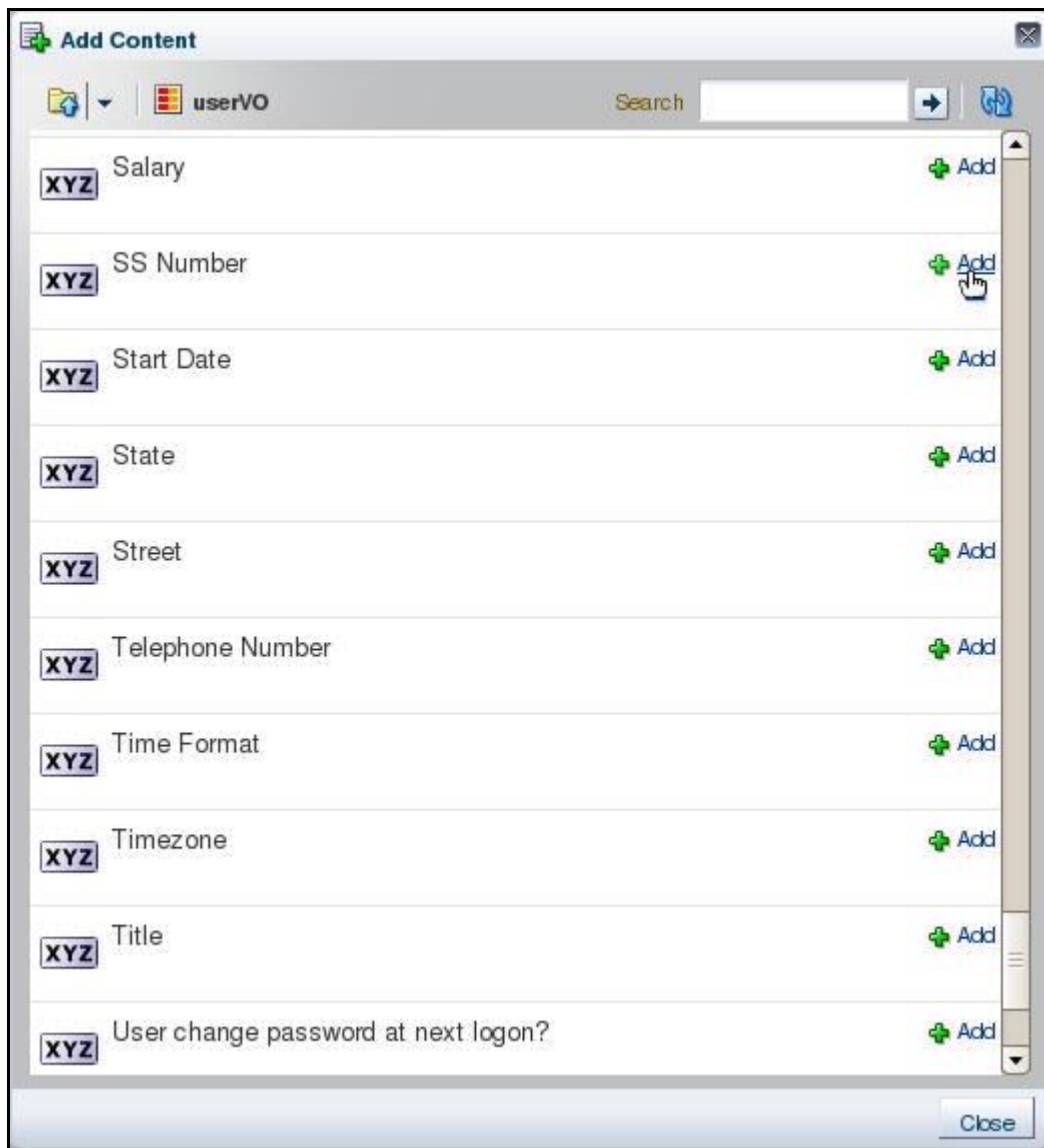18. On the Editing Page page, click Add Content.

19. On the Add Content window, click the Open link to the right of Data Component – Catalog.
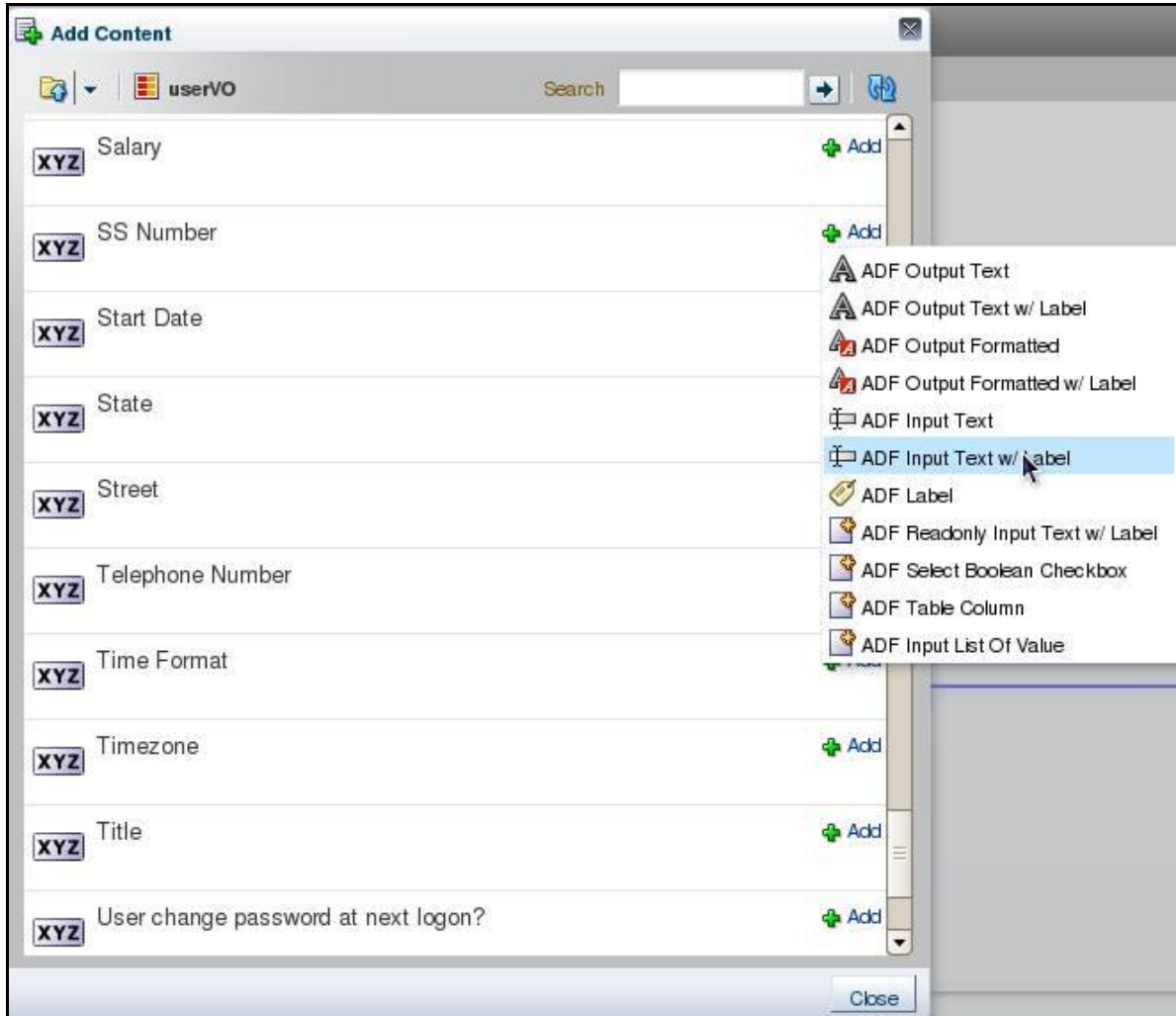
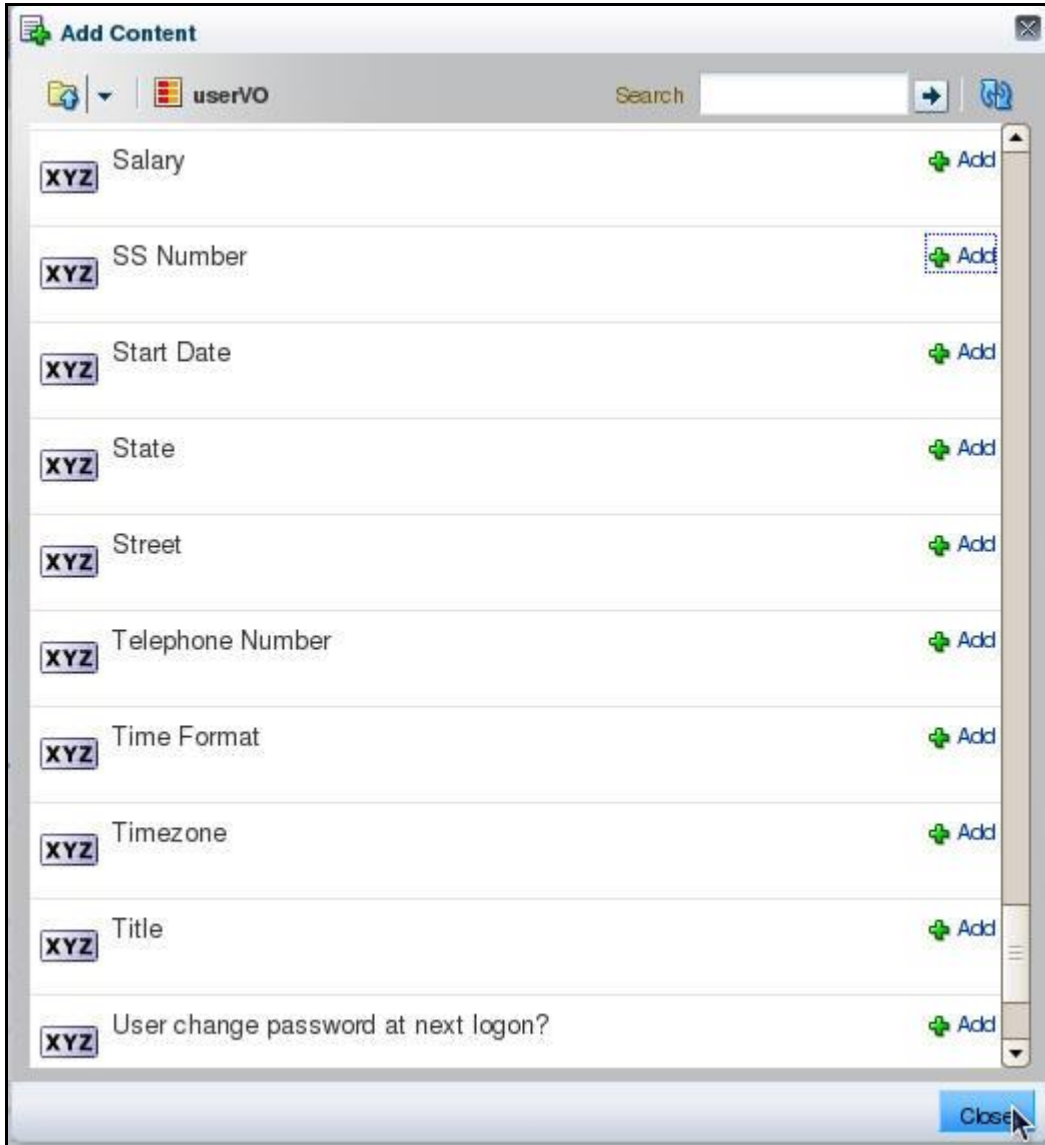20. On the Add Content window, click the Open link to the right of `userVO`.

21. On the Add Content window, click the Add link to the right of the UDF you created in this procedure (SS Number).

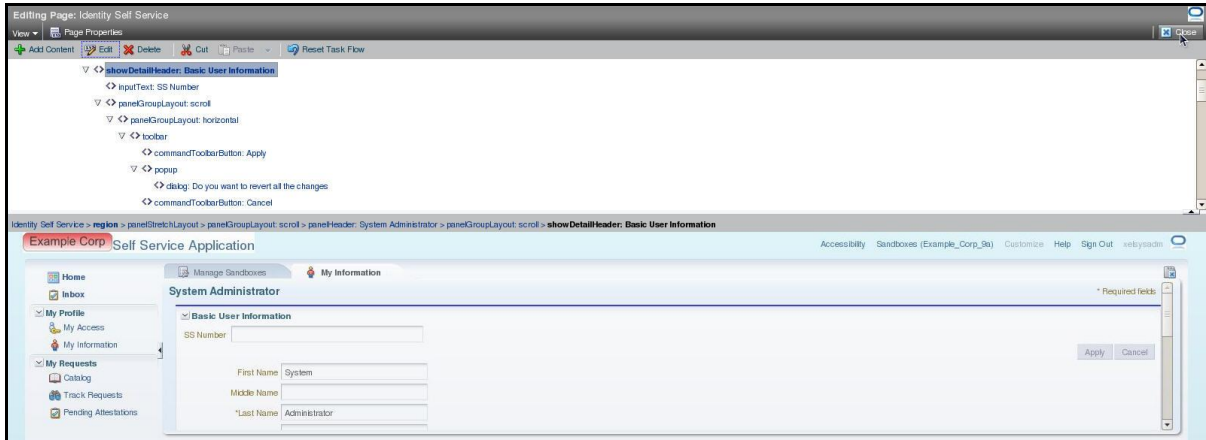22. Select ADF Input Text w/Label from the popup window that appears.

23. On the Add Content window, click Close.

The SS Number UDF you created appears at the top of the Basic User Information page.

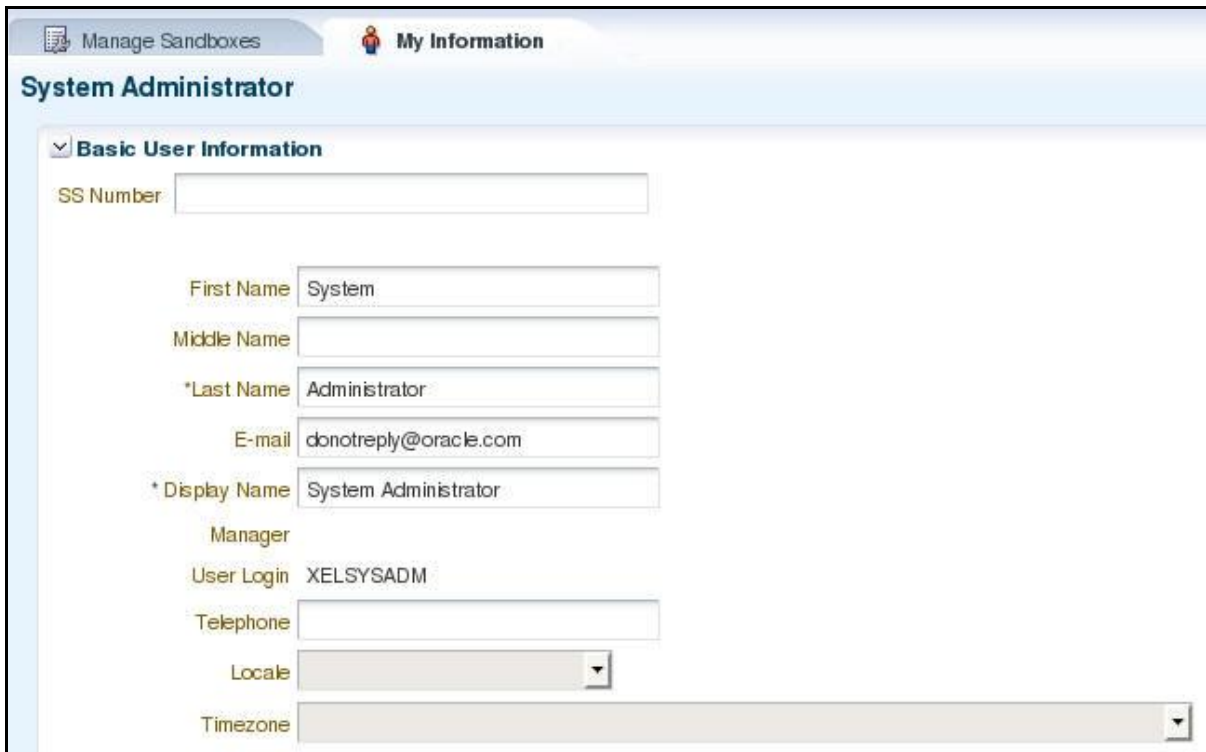Customizing Oracle Identity Manager

24. On the Editing Page page, click Close.

25. Publish the `Example_Corp_9a` sandbox.

26. On the Home page of the Identity Self Service Console, click the My Information link.

    The SS Number UDF you created appears on the Basic User Information page.

    You added a UDF as a text field to a page in Oracle Identity Manager.

Adding the User-Defined Field (UDF) to a Search Page

Overview

In the previous topic, you added the SS Number UDF as a text field to the Basic User Information page of the Identity Self Service Console.

You are ready to add this UDF as an attribute to the Search Results table of the Users form.

Tasks

1. Make the Identity Self Service Console active.

2. Sign in to the console as the `xelsysadm` user.

3. Create and activate a sandbox called `Example_Corp_10`.

4. Click Customize to open the Web Composer.

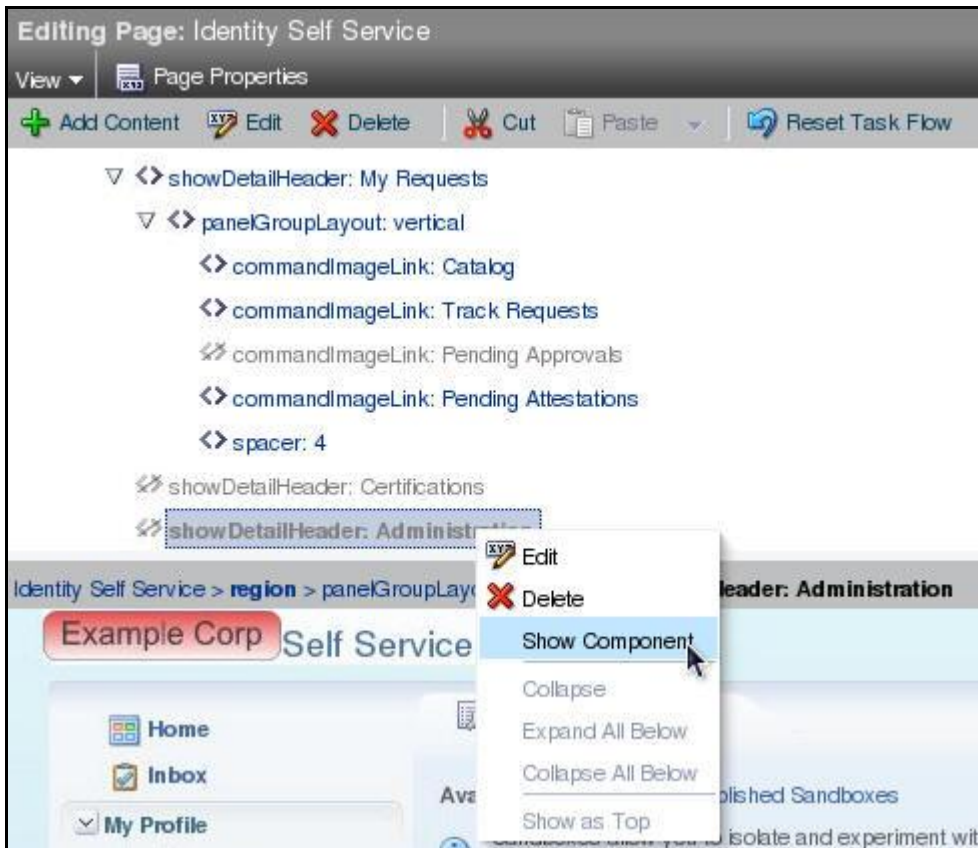

5. Select the View menu. Then, select Source from the drop-down menu that appears.

6. Select the My Requests menu (a blue border should appear around the content of this page). On the Confirm Task Flow Edit window, click Edit.
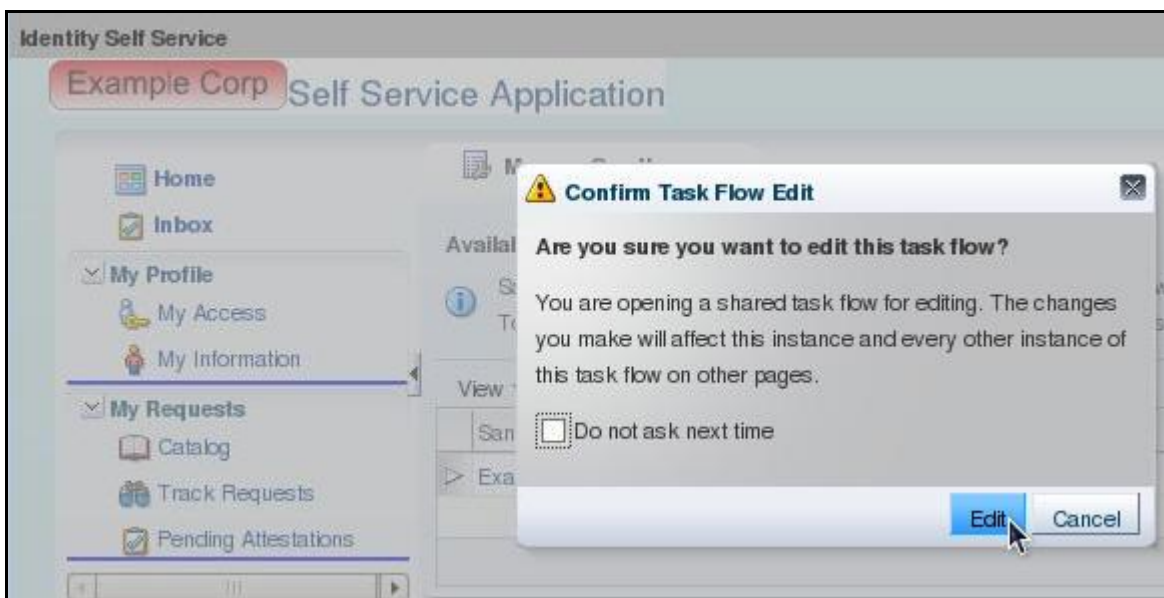
7. Right-click the `showDetailHeader: Administration` and select Show Component from the popup menu that appears.

Note: In this topic, you are adding the SS Number UDF as an attribute to the Search Results table of the Users page. Presently, this page is hidden, along with all other pages of the Administration menu. Therefore, by selecting Show Component, you are enabling all pages that compose the Administration menu (including the Users page) to appear.

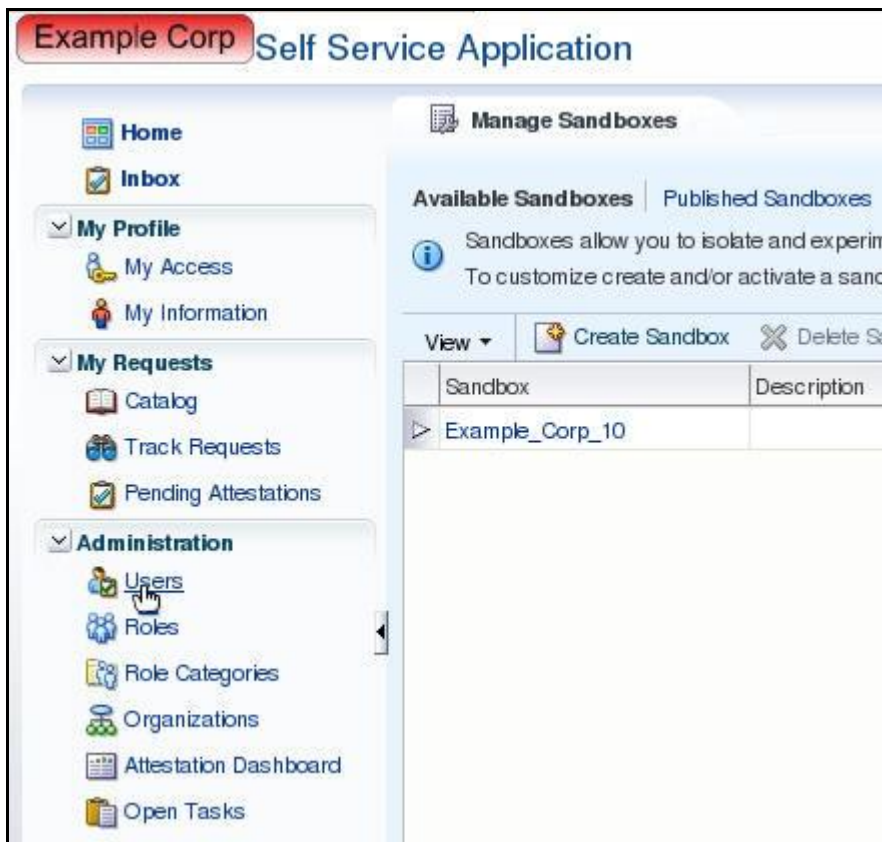8. On the Editing Page page, click Close.

The Administration menu now appears on the Identity Self Service Console.

Now that the Users page is accessible, you are ready to add the SS Number UDF as an attribute to the Search Results table of the Users form.

9. On the Home page of the Identity Self Service Console, click the Users link (located in the Administration menu).

10. Click Customize to open the Web Composer.

11. Select the View menu. Then, select Source from the drop-down menu that appears.

12. Click the Search Results table. The `table:t1` item should be highlighted in the Editing Page page.

Note: `t1` represents the first (and only) table on the Users page: the Search Results table.
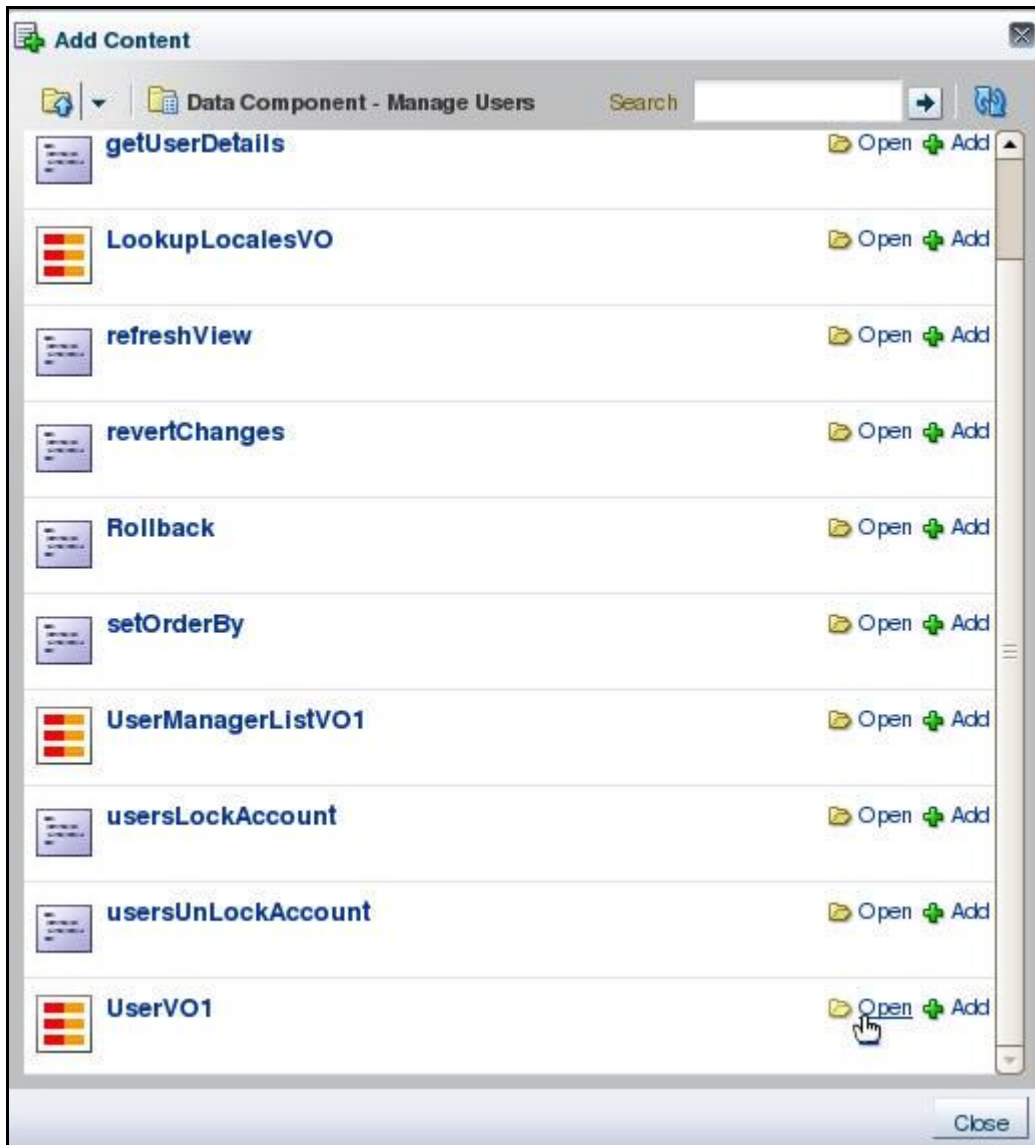
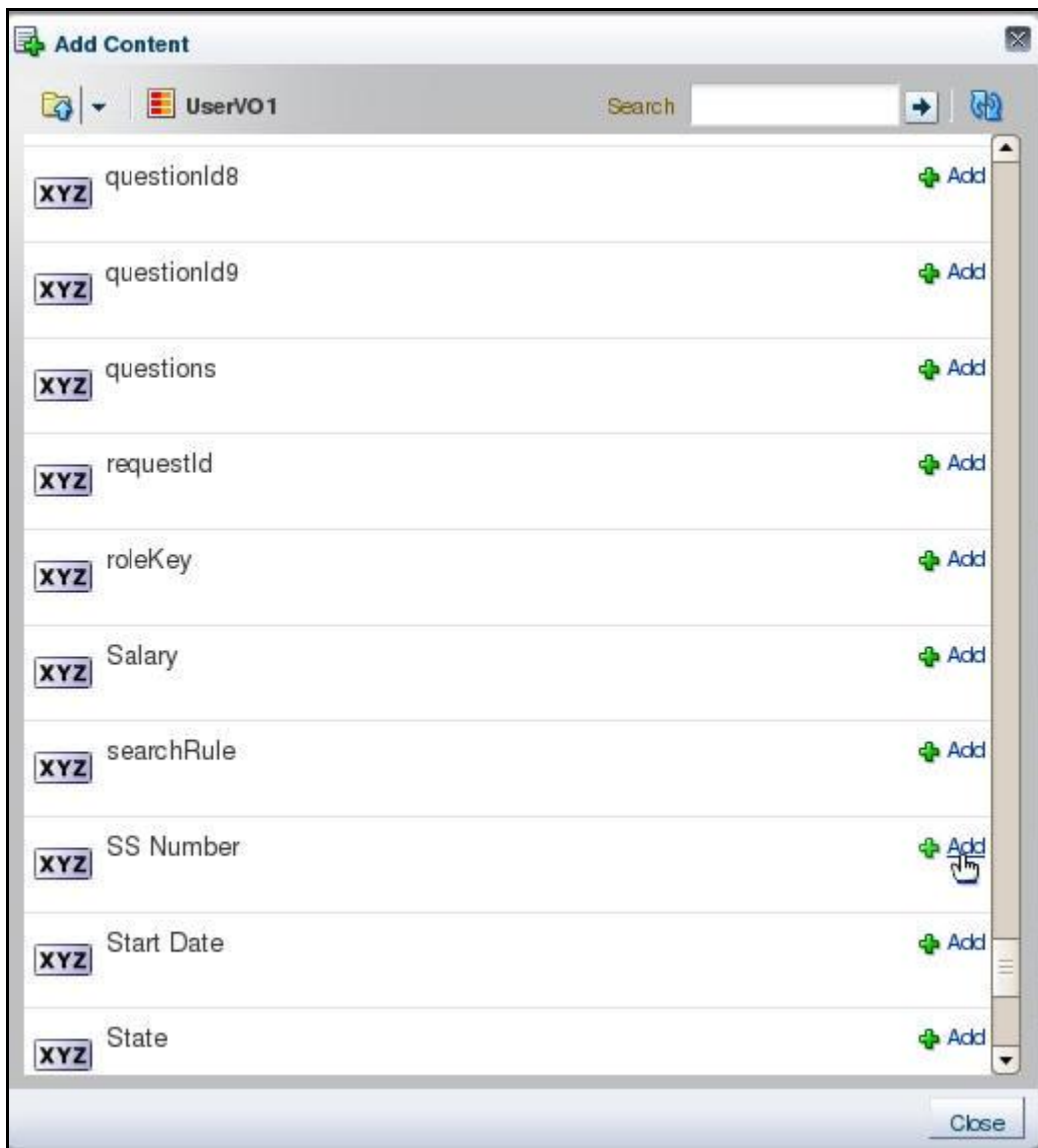14. On the Editing Page page, click Add Content.

15. On the Add Content window, click the Open link to the right of Data Component – Manage Users.
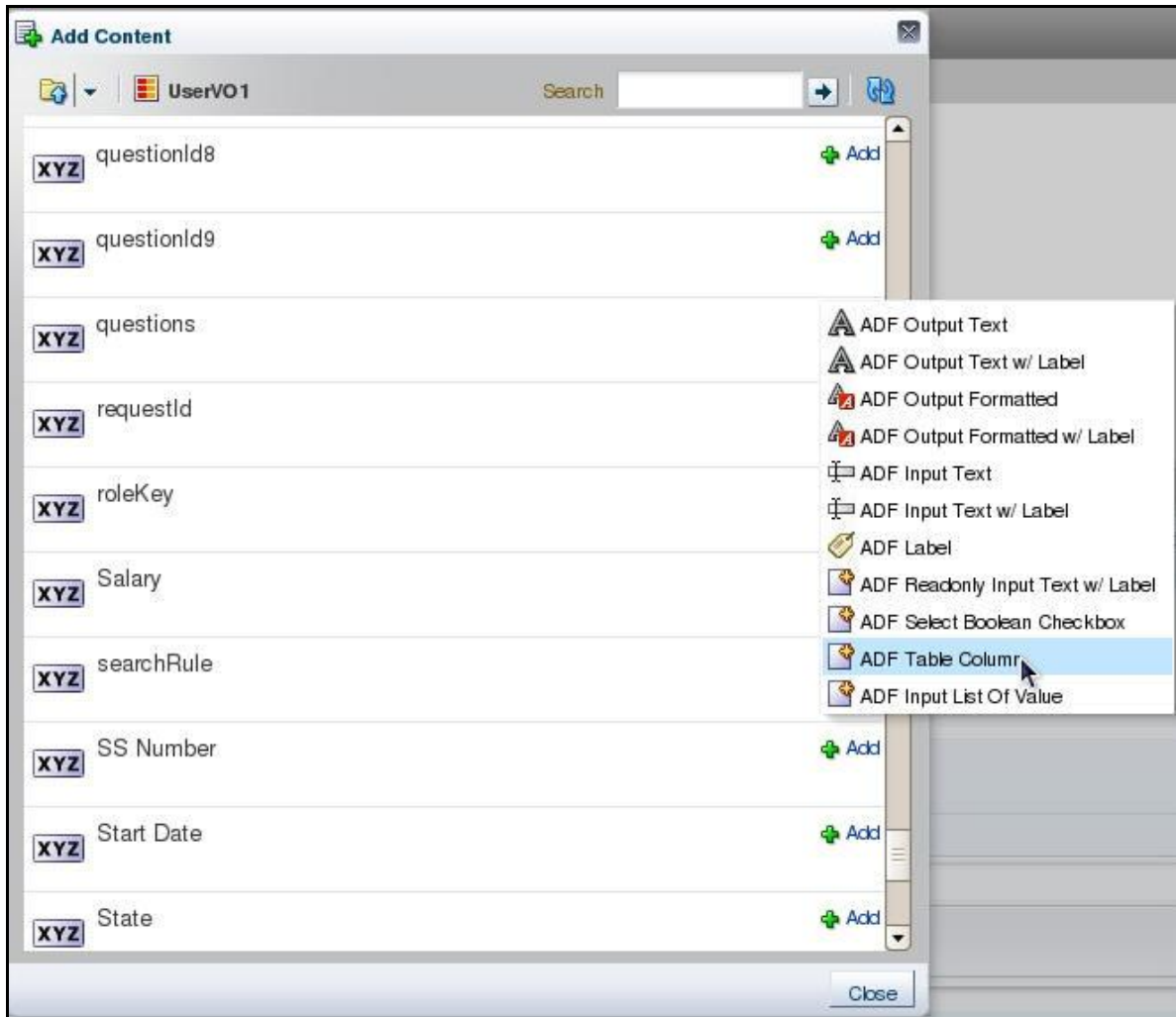
16. On the Add Content window, click the Open link to the right of `UserVO1`.

17. On the Add Content window, click the Add link to the right of the UDF you created in the previous topic (SS Number).

18. Select ADF Table Column from the popup window that appears.

Note: You select ADF Table Column because you want to add the SS Number UDF to the Search Results table of the Users page.

20. On the Add Content window, click Close.

21. Verify that you see the SS Number UDF as a column on the Search Results table.

22. Click on the SS Number column. A blue border should appear around this column. In addition, the column: SS Number should be highlighted on the Editing Page page.


23. On the Editing Page page, click Edit.

Customizing Oracle Identity Manager
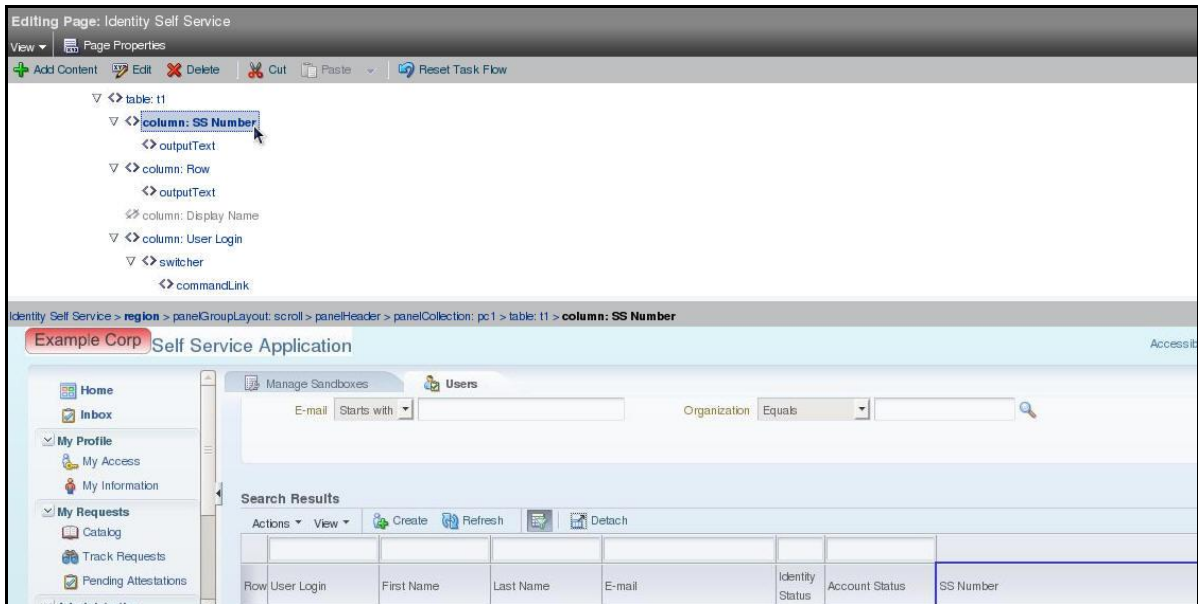
24. On the Component Properties window, click the Down Arrow button to the right of the Header Text field. Select Expression Builder from the popup menu that appears.
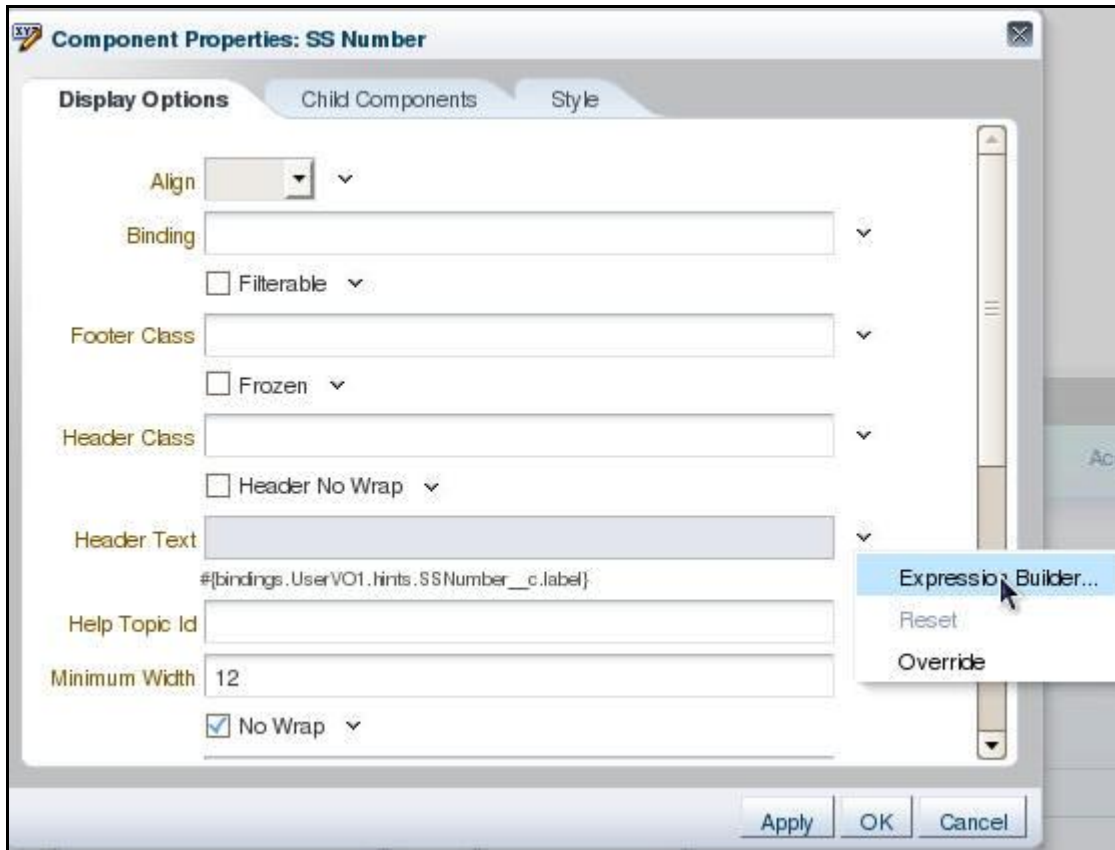
25. In the Edit window, select the Type a value or expression option. In the text area below the option, enter **User Classification**. Click OK.

Customizing Oracle Identity Manager
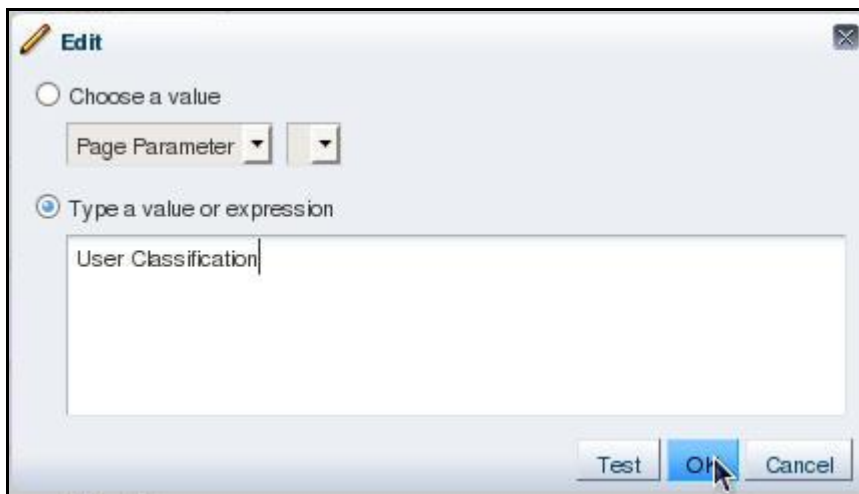
26. On the Component Properties window, enter **SSNumber__c** in the Sort Property field. Select the Filterable and Sortable check boxes. Click OK.
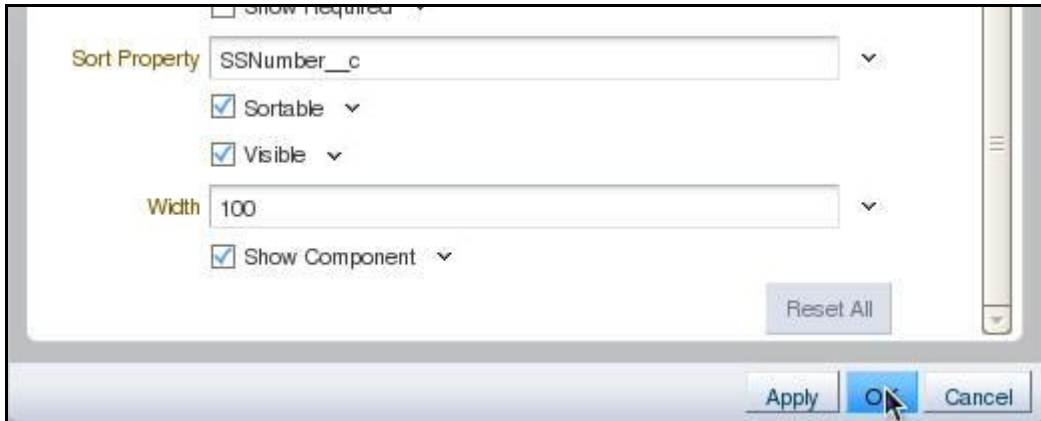
Important: Make sure that two underscores (__) appear between `SSNumber` and `c`.

The Column Header of the Search Results table changes from SS Number to User Classification. Also, there is a white text box that appears above this column, signifying that this column is both searchable and filterable.
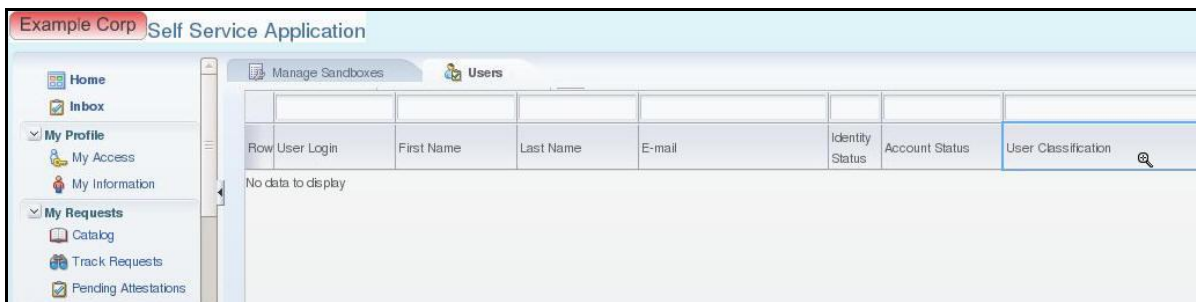
27. On the Editing Page page, click Close.

28. Publish the `Example_Corp_10` sandbox.

29. On the Home page of the Identity Self Service Console, click the Users link (contained within the Administration menu).

The User Classification column, which represents the SS Number UDF, appears on the Search Results table.