



One Identity Manager 8.1.5

Operational Guide

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Legend

 **WARNING:** A WARNING icon highlights a potential risk of bodily injury or property damage, for which industry-standard safety precautions are advised. This icon is often associated with electrical hazards related to hardware.

 **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

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About this guide

The *One Identity Manager Operational Guide* provides an overview of the tasks and features that will be of assistance to you during normal operation of One Identity Manager.

This guide is intended for end users, system administrators, consultants, analysts, and any other IT professionals using the product.

NOTE: This guide describes One Identity Manager functionality available to the default user. It is possible that not all the functions described here are available to you. This depends on your system configuration and permissions.

You will learn how to analyze and monitor data changes in the Manager. It describes how you schedule execution times for operations. Basic tasks in One Identity Manager, such as editing schedules and mail templates as well as creating password policies, are explained. The guide also describes simple procedures that are used to export and import application data.

It explains how to declare changes to the configuration in the system, how to check data consistency and how to exchange custom changes between the development database, test database and productive database.

This guide does not describe the Operations Support Web Portal. For information about this topic, see the *One Identity Manager Operations Support Web Portal User Guide*.

Available documentation

You can access One Identity Manager documentation in the Manager and in the Designer by selecting the **Help | Search** menu item. The online version of One Identity Manager documentation is available in the Support portal under [Technical Documentation](#). You will find videos with additional information at www.YouTube.com/OneIdentity.

Simulating data changes in the Manager

Using the simulation mode in the Manager, you can record and analyze the effects of comprehensive data changes to begin with before finally applying the changes.

The following information is recorded during the simulation:

- Calculation tasks for the DBQueue Processor resulting from the change
- Trigger changes that result from the change
- Processes that are generated as a result of the change
- Objects that are affected by the change
- Recalculations of compliance rules that result from the change

Detailed information about this topic

- [Prerequisites for using the simulation mode](#) on page 9
- [Starting and completing a simulation](#) on page 10
- [Evaluating the simulation data](#) on page 11
- [Exporting the simulation data](#) on page 13
- [Configuring the simulation report](#) on page 10

Prerequisites for using the simulation mode

- To use the simulation mode in the Manager, the user needs the **Option to start database simulation from the user interface** (Common_Simulation) program function.

- To re-calculate the compliance rules in simulation mode, enable the **Identity Audit Simulation** and **Identity audit simulation summary** plug-ins in the Manager program settings.
- To ensure that the users can export the simulation data, enable the **Common | Simulation | ExportReport** configuration parameter in the Designer. If necessary, configure the report for exporting the simulation data.

Related topics

- [Configuring the simulation report](#) on page 10

Configuring the simulation report

In the default One Identity Manager installation, the simulation report is created without the simulation data for evaluating the rules.

To change the current report:

- In the **Common | Simulation | ExportReport** configuration parameter in the Designer, enter the technical name of the report to be used to export the simulation data.


Table 1: Available simulation reports

Technical name	Description
VID_DatabaseSimulationResult_Export	The report shows the simulation data without evaluating the rules. This report is the default report.
VID_DatabaseSimulationResult_with_Compliance_Export	The report shows the simulation data including an evaluation of the rules.

Starting and completing a simulation

⚠ WARNING: You should only use the simulation mode in exceptional circumstances. During a simulation, the objects you are editing are locked for other users. Work on individual administration tools may be restricted. Under certain circumstances, the One Identity Manager Service stops running further processes during the simulation phase. Depending on the scope of the changes, the entire One Identity Manager environment can come to a standstill.

| **NOTE:**

- The active simulation mode is displayed in Manager by the symbol  in the status bar and a red status bar displayed.
- To prevent an excessively long blockade of the overall system, simulation mode ends after 5 minutes if no data change is saved.

To run a simulation:

1. In the Manager, select **Database | Start simulation**.
2. Confirm the security prompt with **OK**.
The program switches into simulation mode.
3. Make your desired changes.
4. To stop the simulation, click **Database | Stop simulation** in the Manager menu.
The program switches to standard working mode and shows the simulation log.

NOTE: After stopping the simulation, you can save the changes. To do this in the Manager, select **Object | Save** or **Object | Specify execution time**.

Related topics

- [Prerequisites for using the simulation mode](#) on page 9
- [Evaluating the simulation data](#) on page 11
- [Exporting the simulation data](#) on page 13

Evaluating the simulation data

When the simulation ends, the recorded modifications are loaded and displayed in the Manager as a protocol.

Table 2: Logging simulation data

View	Description	Displayed information	
Overview	This gives you an overview of which actions the applied changes will trigger. You can export the simulation data and display the report.	Number of applied changes for each action.	
DBQueue	The DBQueue log shows the following information. You can show the additional information from the context menu.	Operation	Calculation tasks to be run.
		Sort order	Sort order to process the calculation task.
		Process ID	Unique process

View	Description	Displayed information	
Generated process	Shows processes and process steps generated during simulation due to the changes. The individual properties of the processes and process steps are also displayed with their actual values.		ID.
		Object	Unique object ID.
		Child object	Unique ID of the child object.
		Process	Name of the generated process.
		Process steps	Name of the generated process step.
Trigger changes	Shows all changes made to objects that have been triggered during the simulation.	Property	Processes property or process step property.
		Value	Property value.
		Table	Display text of the table to which the record belongs. This is used to group the objects.
		Object	Object affected by the change.
		Column	Column that was changed.
Changed objects	Shows objects and their properties if they were affected by the changes made during simulation.	Old value	Column value before the change.
		New value	Column value after the change.
		Table	Display text of the table to which the record belongs. This is used to group the objects.
		Object	Object affected by the change.


View	Description	Displayed information	
		Column	Column that was changed.
		Old value	Column value before the change.
		New value	Column value after the change.
Rule evaluation	During the simulation, the system recalculates all the rules that are affected by the changes. New rule violations and rule violations that no longer apply as a result of the recalculation are displayed.	Employee	Employee who has newly violated the rule or is no longer violating the rule for the first time.
		Rule violation	Type of change (rule no longer violated or new rule violation) and the affected rule.
		Description	Description of the rule violation.

Related topics

- [Prerequisites for using the simulation mode](#) on page 9
- [Starting and completing a simulation](#) on page 10
- [Exporting the simulation data](#) on page 13

Exporting the simulation data

To export and display the simulation data as a report:

1. In the simulation log, select the **Overview** view.
2. Click the  button next to the list of actions.
3. Use the file browser to select the directory path for the report and enter a file name for the report.
4. To generate the .PDF report, click **Save**.
5. Click **Yes** to show the report now.

Related topics

- [Prerequisites for using the simulation mode](#) on page 9
- [Configuring the simulation report](#) on page 10

Scheduling operations activation times

As a rule, deferred deletion of user accounts by processes is defined in the table definitions as 30 days. After the deferred deletion limit has expired, the user accounts are deleted from the database. In addition, in the Manager, you can create, change, or delete an object at a specified point in time. The DBQueue Processor checks whether scheduled operations exist. When the scheduled time is reached, the operation is executed by the One Identity Manager Service.

To execute operations at a specified point in time

- In the Designer, check if the **Common | DeferredOperation** configuration parameter is set. Check the value of the configuration parameter and adjust it if necessary. Permitted values are:
 - **1** (default): In the Manager, you can schedule the time of execution for creating, changing, or deleting an object.
 - **0**: Deferred deleted operation are carried out, such as, deferred deletion of user accounts. It is not possible to schedule the time of execution in the Manager.

You must recompile the database if you enable or disable the configuration parameter.

- In the Designer, check the **Common | DeferredOperation | AllowUpdateInInsertMode** configuration parameter and adapt it to the required behavior.
 - If this configuration parameter is disabled, an error occurs during processing if you try to insert an object that already exists in the database.
 - If this configuration parameter is enabled, when you insert an object that already exists in the database, the object is updated.
- In the Designer, check the **Common | DeferredOperation | IgnoreMissingOnDelete** configuration parameter and adapt it to the required behavior.
 - If this configuration parameter is disabled, an error occurs during processing if you try to delete an object that no longer exists in the database.

- If this configuration parameter is enabled, missing objects are ignored during deletion.

Detailed information about this topic

- [Planning times of execution in the Manager](#) on page 16
- [Displaying scheduled operations in the Manager](#) on page 17

Planning times of execution in the Manager

To plan a time of execution for creating and changing an object

1. In the Manager, select the object for which you wish to specify an execution time.
2. Select the **Change master data** task.
3. Change the values you wish to edit.
4. Select the **Object | Specify execution time** menu item.
5. Specify a change date.
6. Specify the time. To do this, select the hours or the minute display and change the setting using the arrow keys.
7. Enter additional information on the operation under **Remarks**.
8. Click **Save**.

To schedule a deletion time for an object

1. In the Manager, select the object for which you wish to schedule a deletion time.
2. Select the **Object | Set deletion time** menu item.
3. Specify the date and time of deletion.
4. Enter additional information on the operation under **Remarks**.
5. Click **Save**.
6. Confirm the security prompt with **Yes**.

Related topics

- [Displaying scheduled operations in the Manager](#) on page 17
- [Labeling input fields and assignments with planned changes](#) on page 19

Displaying scheduled operations in the Manager

To display all scheduled operations

- In the Manager menu, click the **Database | Show deferred operations** item.

The scheduled operations with their times of execution are displayed in an overview. If the scheduled run time for an operation has passed or an error occurred when the operation ran, the corresponding entry is marked in red.

Figure 1: Overview of scheduled operations







Operation	Execution time	Execution state	Remarks	Created by
Change object	28.09.2017 12:02	pending	Operation Update on 'Beierle, Dr ...	Harris, Clara
Change object	28.09.2017 12:03	pending	Operation Update on 'Harris Clara'...	Harris, Clara



The following information is displayed.

Table 3: Information on data changes

Information	Meaning
Table	Name of the table to which the data record belongs. This is used to group the objects.
Object	Object affected by the operation.
Operation	Operation that is run for the object. Permitted operations are Add object , Change object , Delete object , Generate event , and Call method .
Time of execution	Time at which the operation should be run.
Comment	Additional comment on the operation. TIP: Click a remark to show the remark in full.
Created by	User who created the scheduled operation.

Table 4: Meaning of icons in the form toolbar

Icon	Meaning
	Load and display the selected object.
	Execute scheduled operations now
	Delete selected objects.
	Re-enable selected objects. If an error occurred during the operation, you can run

Icon	Meaning
	the change again.
	Reload the data.
	Filter view.

Related topics

- [Restricting the display of scheduled operations](#) on page 18

Restricting the display of scheduled operations

To limit the information for scheduled operations using defined filter conditions, use predefined filters. You can filter according to the statuses of the scheduled operations, or by scheduled operations.

To restrict the display

1. In the Manager, click the **Database | Show deferred operations** menu item.
2. In the overview of schedule operations, open the **Filter view** menu.
3. Select one or more filters under the **State** or the **Operation** item.

TIP: To display all scheduled operations, go to the **Filter view** menu and select **Show all**.

Table 5: Predefined filters



Filter		Meaning
State	Outstanding operations	Shows or hides pending operations.
	Expired operations	Shows or hides operations whose time of execution has already expired.
Operation	Create object	Shows or hides all entries with the Add object operation.
	Change object	Shows or hides all entries with the Change object operation.
	Delete object	Shows or hides all entries with the Delete object operation.
	Generate event	Shows or hides all entries with the Generate event operation.
	Calling methods	Shows or hides all entries with the Call method

Filter	Meaning
	operation.
Show all	All scheduled operations are displayed.

Labeling input fields and assignments with planned changes

In the Manager, input fields and assignments with changes planned for a specific time, are labeled with additional icons. The new values are not shown for security reasons.

Table 6: Labeling of input fields and assignments with planned changes

Icon	Meaning
	The change in value is planned for a specific date and time. You can change the value only at the specified time.
	The change in value is planned for a specific date and time.

Re-applying templates

You can use templates in One Identity Manager to populate columns with default values or to map a column value from another column. For detailed information about templates, see the *One Identity Manager Configuration Guide*.

In the Manager, you can re-apply the templates to the objects. This may be necessary if you have changed a template. In this case, column values determined by a template will be updated.

NOTE:

- Columns of an object are then also filled if they are not viewable on the current form in the Manager.
- This could also cause large numbers of dependent objects to be modified and processes to be generated.
- Templates defined in customizers are also executed again.

To re-apply templates to the current object

1. In the Manager, select the object to which you wish to reapply the template.
2. Select the **Change master data** task.
3. In the menu, click **Object | Reapply templates**.
4. Save the changes.

Exporting data with Manager

Using the Manager, you can export the data for the application data model. An export form supports the export of data in CSV format, which you can edit with Microsoft Office Excel or import into other One Identity Manager databases. You can export all data of a base table. In addition, you can export the data of tables that are linked by a foreign key relation to the base table.

NOTE: To export data in the Manager, the user needs the **Data export option** (Common_ DatabaseExport) program function.

Detailed information about this topic

- [Creating a data export](#) on page 21
- [Saving the export definition as a simple report](#) on page 22
- [Saving the export definition in the user settings](#) on page 24
- [Saving the export definition in a file](#) on page 23




Creating a data export






To create an export


1. In the Manager, use the **Database | Export data** menu item to open the export form.
2. In the **Column selection** pane in the **Base table** menu, select the table from which the data is exported.

The database columns that can be exported are loaded and displayed in tabular form. The columns of the selected base table are displayed. In addition, all tables linked by a foreign key relation to the base table are displayed.

3. Select the columns that you wish to export and click the **Export** option.


TIP: To mark all columns, use the  button in the toolbar. To clear all selected columns, click the  button. You can use the  button to display the display names or the technical names.

4. Use the **Export display value** option to set whether you wish to export actual values from the column or the display name. This may be necessary for database columns with special formatting, such as multilingual entries or a specified number of decimal places.
5. (Optional) In the **Columns to export** pane, use the , , and  buttons to adjust the sort order of the export columns.
6. (Optional) In the **Condition** pane, create a condition for further limiting the data records to be exported. The condition is defined as a valid where clause for database queries. You can enter the SQL query directly or with a wizard. Click  next to the field to open the wizard.
7. In the **Export data** pane, use the  button to create an export preview.

In the **Export data** pane, select the time zone for the export and create a preview of the export using the  button.

The data sets that match the export criteria are shown in a table. Change how the data is sorted, if necessary. Click a column in the table header of the result list to sort by the selected column.

NOTE: The sort order of the preview is not only used for display purposes, but also affects the data export. The data is exported as displayed in the preview.

8. In the **Export data** pane, use the  button to start the export. Use the file browser to select the directory path for the export and enter a file name for the export.
9. To generate the .csv file, click **Save**.

NOTE: You can also export the file by selecting a menu item in the Manager navigation view. By default, the entries on the result list of the selected menu item are applied to the export. Under certain circumstances, the generated filter for the data set to be exported cannot be edited using the database query wizard. In this case, change the condition directly.

Related topics

- [Saving the export definition in the user settings](#) on page 24
- [Saving the export definition in a file](#) on page 23
- [Saving the export definition as a simple report](#) on page 22

Saving the export definition as a simple report



A simple report with the export definitions is created, which can be displayed and subscribed to in the Web Portal. You make this report available to Web Portal users.

NOTE:

- This function is only available if Report Subscription Module is installed.
- To create a simple report with export definitions, enable the **Data export as report** plug-in in the program settings in the Manager.
- Simple reports that you create in the Manager can be displayed as statistics in the Manager's info system. To do this, you must alter the **Manager**'s user interface in the Designer. In the Manager's info system, the report opens when you double-click on the statistic's header.

For more information about how to implement statistics in the user interface for using in simple reports, see the *One Identity Manager Configuration Guide*.

To create a simple report with the export definition

1. In the Manager, select the **Database | Export data** menu item to open the export form.
2. Create the export.
3. Click  in the title bar of the export form.
4. Enable **Simple list report**.
5. Click the  button next to the report definition menu and enter the following information:
 - **Name:** Name of the report.
 - **Description:** Additional information about the report.
6. Click **OK**.
7. Click **Save**.

To make the report available to Web Portal users, assign the report to the employees. For detailed information, see the *One Identity Manager Report Subscriptions Administration Guide* and the *One Identity Manager Web Portal User Guide*.


Related topics

- [Saving the export definition in the user settings](#) on page 24
- [Saving the export definition in a file](#) on page 23
- [Creating a data export](#) on page 21

Saving the export definition in a file

To make an export definition available to other users, save the export definition as a .xml file.


To save the export definition to a file:

1. In the Manager, select **Database | Export data** to open the export form.
2. Create the export.
3. Click  in the title bar of the export form.
4. Enable the **Save to file** option.
5. Open the file browser by pressing the button next to **Filename**, select the directory path and enter a name for the export definition.
6. Click **Save**.

The .xml file is generated. The file browser is closed. The path and file name are displayed under **File name**.

7. Click **Save**.

To load an export definition from a file:

1. In the Manager, select **Database | Export data** to open the export form.
2. Click  in the title bar of the export form.
3. Enable the **Load from file** option.
4. Open the file browser by pressing the button next to **Filename**, select the directory path and the file with the export definition.
5. Click **Open**.

The .xml file is loaded. The file browser is closed. The path and file name are displayed under **File name**.

6. Click **Open**.



Related topics

- [Saving the export definition in the user settings](#) on page 24
- [Saving the export definition as a simple report](#) on page 22
- [Creating a data export](#) on page 21


Saving the export definition in the user settings

You can save an export definition in the user account configuration and reload it from there. If you store an export definition in the user account configuration, this export definition is only available to you.



To save an export definition to the user settings:

1. In the Manager, select **Database | Export data** to open the export form.
2. Create the export.
3. Click  in the title bar of the export form.
4. Enable the **Save in user settings** option.
5. Click the button  beside the **Export name** input field and enter a name for the export definition..
6. Click **Save**.

To load an export definition from the user settings;

1. In the Manager, select **Database | Export data** to open the export form.
2. Click  in the title bar of the export form.
3. Enable the **Load from user settings** option.
4. Select the export definition from **Export name**.
5. Click **Open**.

To delete an export definition from the user settings:

1. In the Manager, select **Database | Export data** to open the export form.
2. Click  in the title bar of the export form.
3. Select **Save in user settings**.
4. Select the export definition from **Export name**.
5. Click  next to **Export name**.
6. To close the dialog, click **Cancel**.

Related topics

- [Saving the export definition in a file](#) on page 23
- [Saving the export definition as a simple report](#) on page 22
- [Creating a data export](#) on page 21

Analyzing data and data changes

In One Identity Manager, you can analyze data and data changes using different methods.

Reports

One Identity Manager provides several reports that present information about objects and their relations to other objects in the One Identity Manager database. For example, there are reports about employees and their user accounts, company structures, resources, and system entitlements, attestation, and compliance rule violations integrated into One Identity Manager. Identification, analysis, and summaries of relevant data are supported with the help of these reports.

The reports analyze data from both the One Identity Manager database and the One Identity Manager History Database. For more information, see [Analyzing data changes in reports and the TimeTrace](#) on page 28.

Use the Report Editor to create reports. For detailed information, see *One Identity Manager Configuration Guide*. You can view reports in the Manager. For more information, see [Displaying reports in the Manager](#) on page 27. Reports about system configuration are supplied in the Designer. For detailed information, see *One Identity Manager Configuration Guide*.

Report subscriptions

You can also send reports to specified email addresses using scheduled subscriptions. Web Portal users request subscribable reports and configure their own personal report subscriptions. The reports are delivered to Web Portal users by email as specified in a personally configured schedule.

For detailed information, see the *One Identity Manager Report Subscriptions Administration Guide* and the *One Identity Manager Web Portal User Guide*.

TimeTrace

Use the TimeTrace function to track changes to an object that were made up to any point in the past.

In its analysis, the TimeTrace function includes the data changes saved to the One Identity Manager database as well as the records stored in a One Identity Manager History Database. You can use this to find out who had which permissions at which point in time.

You can apply historical data to the current object and restore the object to the status prior to the change. For more information, see [Analyzing data changes in reports and the TimeTrace](#) on page 28.

In the Manager, you can see the change data in the TimeTrace view. For more information, see [Displaying change information in the Manager](#) on page 32.

Statistics

Statistics are recalculated at regular intervals and visualized in the user interface in various diagrams. This provides you with an overview of the system status at a glance.

In the Manager, you can see statistics in the Info system. For more information, see [The Info system in the Manager](#) on page 34. More statistics are available in the Web Portal. For detailed information about statistics in the Web Portal, see the *One Identity Manager Web Portal User Guide*.

Displaying reports in the Manager

The Manager contains various reports about employees and their user accounts, company structures, resources, and system entitlements, attestations, and compliance rule violation reports.

To display a report in the Manager

1. Select the objManagerect you want to see the report for.
2. In the task view in the **Reports** section, select the report.

This generates and displays the report.

TIP:

- Use the tooltip in the task view to show a more detailed description of the report.
- You can find additional report in the **My One Identity Manager** category.
- You can cancel the report while it is generating by clicking **Cancel** button.

In the report form you can change the window size and switch between pages. The following table shows other features.

Table 7: Functions for displaying reports

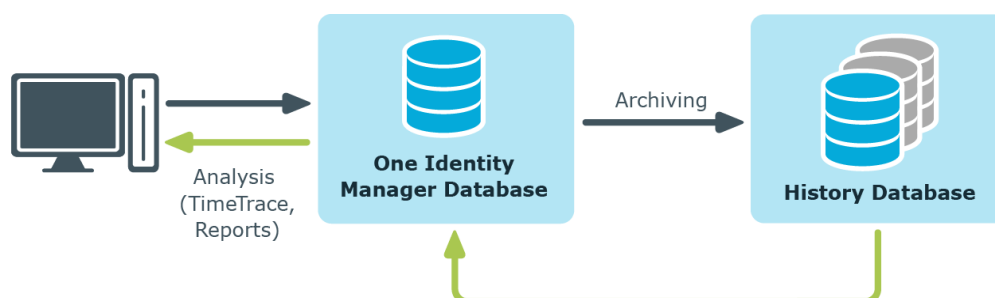
Button	Description	Shortcut
Print	Print report.	Ctrl + P
Save	Save report. There are additional save options on the selection menu.	
Send by email	Send report by email.	

Button	Description	Shortcut
Page size	Change page size.	Ctrl + Shift + S
Bookmarks	Set bookmark.	Ctrl + B
Parameters	Show the parameters applied when generating the report.	Ctrl + Enter
Find	Search in the report.	Ctrl + F
Full screen	Show full screen preview.	F2
Single page	Show a single page.	F3
Page width	Change the page width.	F5

Analyzing data changes in reports and the TimeTrace

In reports and in the TimeTrace, an analysis is carried out of the data changes saved in the One Identity Manager database and those stored in a One Identity Manager History Database. You can use this to find out who had what permissions at which point in time.

Figure 2: Analyzing data changes



Prerequisite for analyzing historical data in reports and in the TimeTrace is the recording of data changes within process monitoring. Data changes that are saved in the One Identity Manager database, can be immediately included in the analysis. To use archived data, the One Identity Manager History Database must be declared in the One Identity Manager database.

Prerequisites for analyzing data changes

- The **Common | ProcessState** configuration parameter is set and a method for recording the data changes with process monitoring is configured.

For detailed information about configuring how data changes are logged, see *One Identity Manager Configuration Guide*.

- To access archived data in the TimeTrace and in reports, the One Identity Manager History Database must be declared in the One Identity Manager database.

There are different ways to establish a connection to the One Identity Manager History Database:

- Method 1: Establish a connection to the One Identity Manager History Database through an application server.

Use this method for accessing the One Identity Manager History Database over an encrypted connection. For more information, see [Connecting a One Identity Manager History Database through an application server](#) on page 30.

- Method 2: Establish a direct connection to the One Identity Manager History Database.

This method uses an unencrypted connection to access the One Identity Manager History Database. For more information, see [Establishing a direct connection to a One Identity Manager History Database](#) on page 31.

For more information about archiving data, see the *One Identity Manager Data Archiving Administration Guide*.

- To display the TimeTrace view in the Manager, the user requires the **Option to show the TimeTrace** (Common_TimeTrace) program function.

For detailed information about permissions and program functions, see the *One Identity Manager Authorization and Authentication Guide*.

- To evaluate how effective assignments (XIsInEffect column) are in reports, check the **Common | ProcessState | PropertyLog | ShowEffectiveAssignmentsOnly** configuration parameter in the Designer and modify it if required.
 - To only display effective assignments in the evaluation of historical assignments in reports, set the configuration parameter (default).
 - To display all assignments as effective, irrespective of their effectiveness, do not set the configuration parameter.

NOTE: The effectiveness of assignments (XIsInEffect column) is logged in the history as from One Identity Manager version 8.1.5. Older assignment data is still display as effective, irrespective of its actual effectiveness.

Related topics

- [Connecting a One Identity Manager History Database through an application server](#) on page 30
- [Establishing a direct connection to a One Identity Manager History Database](#) on page 31
- [Displaying change information in the Manager](#) on page 32

Connecting a One Identity Manager History Database through an application server

Prerequisites for connecting a One Identity Manager History Database through an application server

- Declaring the One Identity Manager History Database in the TimeTrace, requires an ID.
- An ID for the One Identity Manager History Database connection is entered in the application server's configuration file (`web.config`).
 - Enter a unique ID for each One Identity Manager History Database.
 - The ID must be entered in all application servers that can be used by users to log in to the Manager.
 - The ID must be entered for the application server that the One Identity Manager Service uses to connect.
- The Manager and the Web Portal use the application server to log in. Otherwise, it is not possible to evaluate data modifications.
- To generate and send report subscriptions and reports by email that show changes to data, there must be a Job server set up over an application server.

For detailed information about setting up a Job server and about configuring the One Identity Manager Service, see the *One Identity Manager Configuration Guide*.

To link a One Identity Manager History Database into a TimeTrace

1. Use the Designer to log in to the One Identity Manager database.
2. In the Designer, select the **Base Data | General | TimeTrace databases** category.
3. Select the **Object | New** menu item.
4. Ensure that the **Use ID from application server** option is set.
5. In **History database name**, enter the name of the One Identity Manager History Database.
6. In the **Connection parameter** field, enter the ID for connecting to the One Identity Manager History Database.

The ID must match the ID in the application server's configuration file.

7. Select **Database | Save to database** and click **Save**.

NOTE: Set the **Disabled** option to disable the connection at a later time. If a One Identity Manager History Database is disabled, it is not taken into account when determining change data in the TimeTrace.

To configure an ID in the application server for connecting to the One Identity Manager History Database

- During installation of the application server, enter the ID for connecting to the One Identity Manager History Database.
- To connect a One Identity Manager History Database at a later date, enter the ID for connection in the application server's configuration file (web.config) in the <connectionStrings> section.

Example:

```
<connectionStrings>

...

<add name="<History Database ID>" connectionString="Data Source=<database
server>;Initial Catalog=<database name>;User ID=<database
user>;Password=<password>" />

...

</connectionStrings>
```

NOTE:

The connection credentials in the application server's configuration file are encrypted with the default Microsoft ASP.NET encryption. If you want to change the connection credentials later, you must decrypt them first and then encrypt them again afterward. Use ASP.NET IIS registration tool to decrypt and encrypt (Aspnet_regiis.exe).

Example call:

Decrypting: aspnet_regiis.exe -pdf connectionStrings <path to web application in IIS>

Encrypting: aspnet_regiis.exe -pef connectionStrings <path to web application in IIS>

Related topics

- [Establishing a direct connection to a One Identity Manager History Database on page 31](#)

Establishing a direct connection to a One Identity Manager History Database

To link a One Identity Manager History Database into a TimeTrace

1. Use the Designer to log in to the One Identity Manager database.
2. In the Designer, select the **Base Data | General | TimeTrace databases** category.

3. Select the **Object | New** menu item.
4. Disable the **Use ID from application server**.
5. In **History database name**, enter the name of the One Identity Manager History Database.
6. Declare the **Connection parameters**.
 - a. Click the [...] button next to the input field to open the input dialog for connection data.
 - b. Enter the connection data for the One Identity Manager History Database.

Table 8: SQL Server database connection data

Data	Description
Server	Database server.
Windows authentication	Specifies whether integrated Windows authentication is used. This type of authentication is not recommended. If you decide to use it anyway, ensure that your environment supports Windows authentication.
User	SQL Server login name.
Password	SQL Server login password.
Database	Database.

7. Select **Database | Save to database** and click **Save**.

NOTE: Set **Disabled** to disable the connection at a later time. If a One Identity Manager History Database is disabled, it is not taken into account when determining change data in the TimeTrace.



Related topics

- [Connecting a One Identity Manager History Database through an application server](#) on page 30

Displaying change information in the Manager

NOTE: To display the TimeTrace view in the Manager, the user requires the Option to show the TimeTrace (**Common_TimeTrace**) program function.

To display an object's change data:

1. In the Manager, open the time trace using the **View | TimeTrace** menu.
2. Select the object whose change information you want to display.
3. Activate the change history for this object in the **TimeTrace** view using the  button.
4. In the **TimeTrace** view, use the  (time range) filter in the toolbar to specify the time range for which the change information is loaded. The changes are determined from the One Identity Manager database and the connected One Identity Manager History Database databases.


All change time stamps in the time frame that has been loaded are now shown in the overview below the timeline.

NOTE: To display changes of assignments to an object, such as the an employee assignment to a department or a resource assignment to an organization, select the relevant assignment form in the task view of the Manager. In the **TimeTrace** view, you can then also select a source for which to display the changes. An additional **Source** menu is offered, in which you can select the respective assignment or the base object.

To select a change time stamp on the timeline:

- To display a part of the timeline in greater detail, click a marking below the timeline.
- Each change time stamp has a label showing the date and time. There is a tooltip for each change, showing which items of data were changed and by whom.
- Select a change time stamp on the timeline or on the label.
- If there are multiple change time stamps which are very close together, when you select a time stamp a context menu appears from which you can choose the specific change time stamp.
- Click the timeline or **Ctrl + mouse wheel** to zoom in or zoom on the display of several time change stamps that are close together.

When you select a change time stamp in TimeTrace, the program's document view opens the object's master data form or the assignment form. Use the timeline or quick edit a label to choose if you want the object settings or assignments to be displayed in the master data form before or after the changes have been made.

If a property of an object shows a historical value, it is marked by an  icon. A tooltip shows the current value of the property. Use the **Show property change history** context menu to display the recorded data for this property.

You can apply historical data to the current object and restore the object to the status prior to the change.

To apply the historic values:


1. Click the  icon in front of the modified property. The following information is displayed.

Table 9: Properties for transferring history data

Information	Meaning
Property	These properties are changed once the historical value is transferred. The changes are made immediately or by templates.
New value	Value of the property after the historical value has been saved.
Old value	Display the current property value. This value is overwritten once the historical value is saved.

2. Click **Save**.

The Info system in the Manager

The Manager's info system provides data about the health of the system in the form of diagrams.

- Topic-specific statistics and cross-functional statistics are displayed on the Manager home page.
- Within each category, topic-specific statistics are displayed under **Info system**.
- Topic-specific statistics for all categories are displayed in the **My One Identity Manager** category.

Statistics definitions form the basis of the info system. These are created centrally. For detailed information about creating statistics definitions, see the *One Identity Manager Configuration Guide*.

Every user can set which statistics they want to see and in which order. Use the settings to do this. The changes are saved to the user configuration so that the last setting used is shown when the program is restarted.

All the available statistics are grouped by topic in the settings. Each statistic has a title and a description.

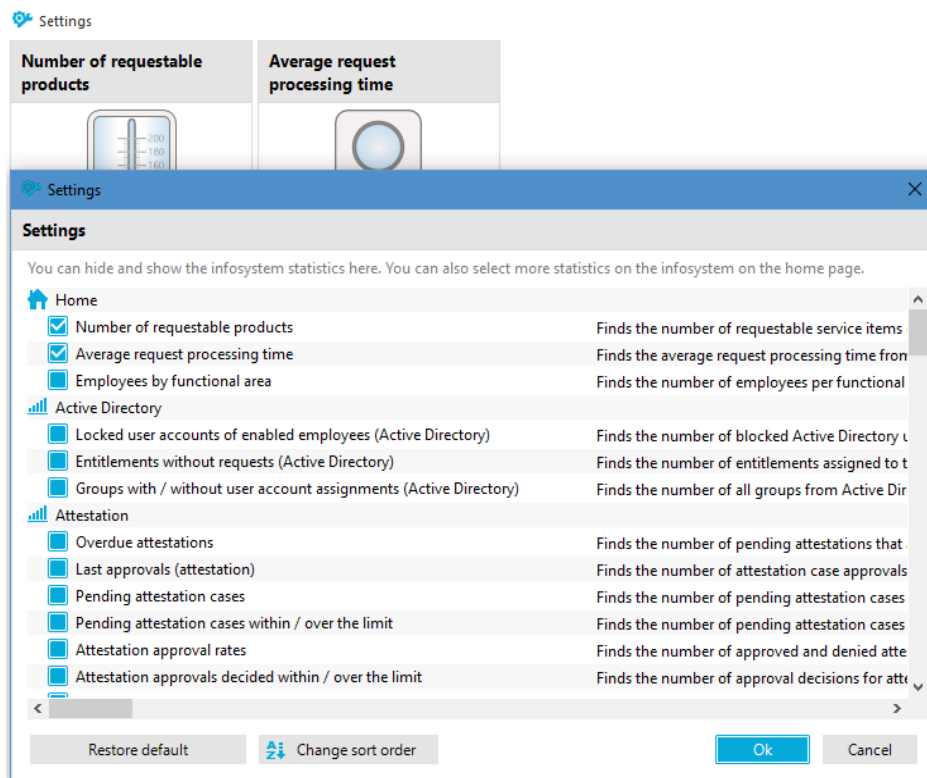
To select statistics for display

1. Show the statistics and click **Settings**.
2. Enable or disable statistics by clicking the button in front of the name of the statistics.

To restore the default setting, click **Restore default**.

3. Click **OK**.

Figure 3: Statistics settings



To change the order in which statistics are displayed:

1. Display the statistics and select **Settings**.
2. Click **Change sort order**.
3. Select the statistic that you wish to move. You can select multiple statistics using **Shift + select** or **Ctrl + select**.
4. Move the selected statistics with the arrow keys.
 - a. Move the selected statistics with the arrow keys.

Table 10: Meaning of buttons for changing the order

Icon	Meaning
↑	Moves the selected statistics up.
↓	Moves the selected statistics down.

To restore the default settings, click **Restore default**.

5. Click **OK**.

- OR -

If you wish to make more changes, go back to the **Assignment view**.

Detailed information about this topic

- [Diagram types in the info system](#) on page 36

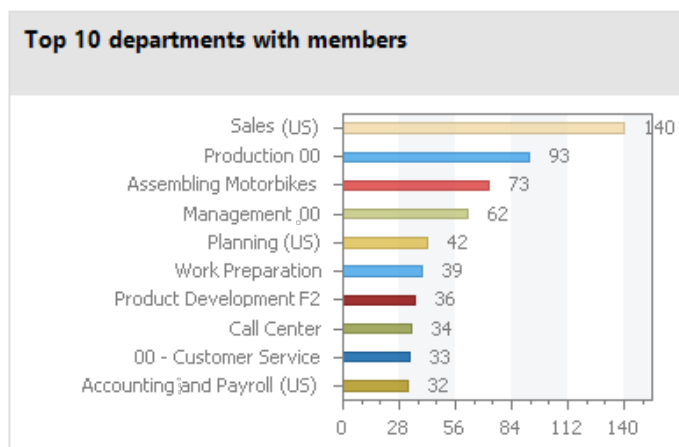
Diagram types in the info system

There are several diagram types available for visualizing statistics.

Bar chart

A bar chart can be used to visualize comparisons between measurements.

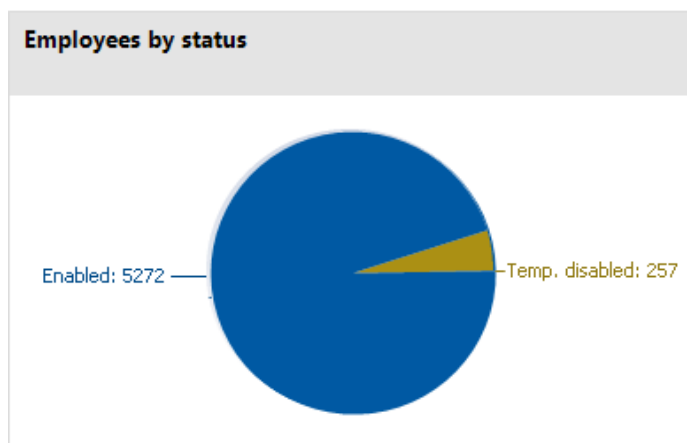
Figure 4: Bar chart example



Pie chart

A pie chart can be used to visualize the measurements as a percentage of the base measurement.

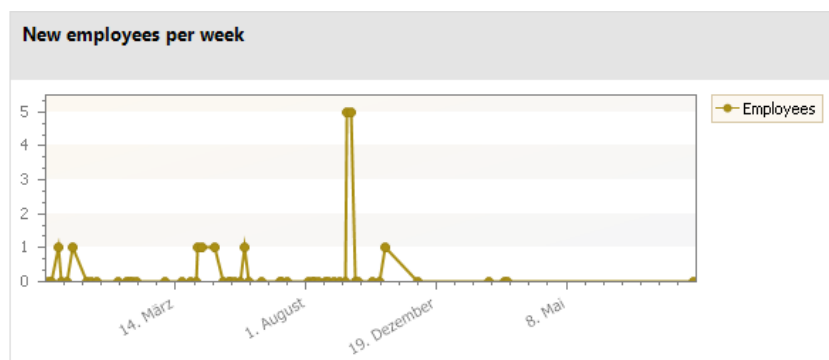
Figure 5: Pie chart example



Line diagram

A line diagram can be used to visualize a data sequence over a specified time period. Click with the mouse on a point of measurement and a tooltip showing the measurement is displayed.

Figure 6: Line diagram example



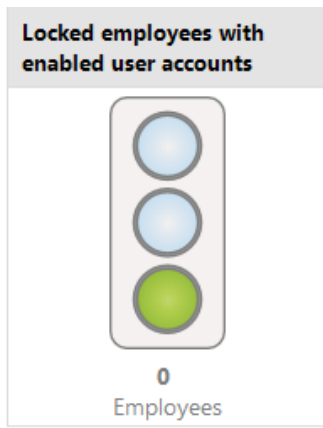
Traffic light

A traffic light diagram can be used to visualize the state of the system. The state is indicated by the color.

Table 11: Meaning of the colors

Color	State
Green	correct
Yellow	acceptable
Red	unacceptable

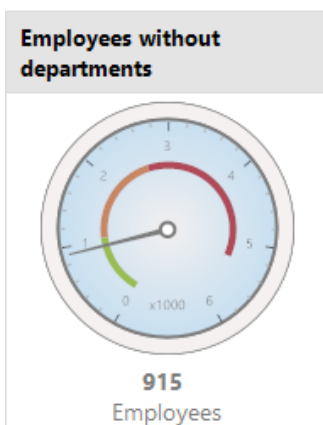
Figure 7: Traffic light example



Tachometer

A tachometer diagram can be used to visualize the state of the system in more detail than in a traffic light diagram. The base measurement is also displayed. The state is indicated by the color.

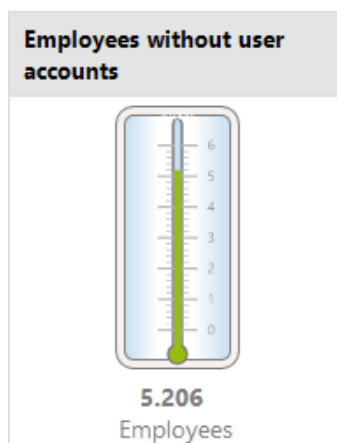
Figure 8: Tachometer diagram example



Thermometer

A thermometer diagram can be used to visualize the state of the system in more detail than in a traffic light diagram. The state is indicated by a color scale on the side of the diagram.

Figure 9: Thermometer diagram example



Table

Choose this diagram type to display the measurements or measurement trends over a certain timeframe in tabular format.

Figure 10: Table example

Number of employees		
	21.09.2017	
Employees	5.274	

Analyzing process monitoring in the Manager

In One Identity Manager, you have the option of logging the change history of objects and their properties. Different methods can be used to track changes within One Identity Manager.

For detailed information about the process monitoring methods, see the *One Identity Manager Configuration Guide*. For more information about configuring process monitoring of IT Shop requests, see the *One Identity Manager IT Shop Administration Guide*.

In the Manager's process view, the system shows the process data from running processes and process steps, the process data for direct database actions, and the recorded data changes in graphical format.

Detailed information about this topic

- [Prerequisites for displaying the process information](#) on page 40
- [Working with the process view](#) on page 41
- [Opening the process view](#) on page 41
- [Process information layout](#) on page 44
- [Layout of logged data changes](#) on page 45

Prerequisites for displaying the process information

- The process view in the Manager is only available if the **Common | ProcessState** configuration parameter is enabled and a method for monitoring the process is configured.
- The process view shows the process data only if the process data recording procedure is configured.

- The log is only displayed in the process view if the method for recording changes to data is configured and the logged in user has at least viewing permissions for the Dialogwatch* , DialogProcess* and QBMWatchOperationSummary tables.
- To open the process view in the Manager, the user needs the **Option to show process information** (Common_ProcessView) program function.

For detailed information about configuring the process monitoring, see the *One Identity Manager Configuration Guide*.

Working with the process view

The process view is divided into two parts.

- The upper part of the process view displays a log containing the logged data changes. You can view the data changes of a process, a user and an object.
- The process information form is displayed in the lower part of the process view. You will find an overview of the actions triggered in the system and the resulting processes. This displays information for the overall process and for the individual steps of a process.

You can configure the layout of process information. You can specify the level from which information is shown, for example, activities, details, or individual steps. You can restrict the scope of the information shown.

Related topics

- [Prerequisites for displaying the process information](#) on page 40
- [Opening the process view](#) on page 41
- [Features in the process view](#) on page 42
- [Configuring the process display](#) on page 43
- [Process information layout](#) on page 44
- [Layout of logged data changes](#) on page 45

Opening the process view

To open the process view:

- In the Manager menu, click **View | Process data**

Related topics

- [Prerequisites for displaying the process information](#) on page 40
- [Features in the process view](#) on page 42

- [Process information layout](#) on page 44
- [Layout of logged data changes](#) on page 45

Features in the process view

Table 12: Meaning of toolbar icons in the process data form












Icon	Meaning
	Reload process data.
	Show process data for the current user (object-related process data).
	Show process data for the selected object (object-related process data).
	Show processes for related objects.
	Show substitute processes.
	Filter process data by status.
	Show data changes for the current user in the log (user-specific changes).
	Show data changes to the object selected in the result list in the log (object-related changes).

Table 13: Items in the process data form context menu

Context Menu Item	Meaning
Search	The system searches for objects in the process view.
Add to favorites	Adds the selected object to your favorites.
Remove from favorites	Removes the selected object from your favorites.
Tasks	The object's available forms are shown and you can switch to the desired form.
Object type: <BaseObject>	This shows the base object of the triggered process
Show process logs	The log shows the data changes of the selected process (process-related changes).
Properties	Show other properties of the active object. This menu item is only available in expert mode.

Table 14: Meaning of toolbar icons in the log

Icon	Meaning
	The selected object appears in the document view.
	The display switches to the originally referenced (old) object and this is shown in document view.
	The display switches to the newly referenced object and this is shown in document view.

Configuring the process display



To configure the process display in the Manager

1. In the Manager, select the **Database | Settings** menu item
2. On the **Functionality** tab, configure the following settings in the **Process information** pane.
 - **Display complexity:** Set the display range. Permitted values are:
 - **Activities:** Activity information (top hierarchy level) is shown.
 - **Details:** Information about activities and their details is shown.
 - **Single steps:** Information about activities, details, and individual steps at the selected depth is shown.
 - **Single step details:** Set the depth of detailed information shown for individual steps. Permitted values are:
 - **Basic information:** Individual steps with a detail depth of **basic information** are shown.
 - **Extended information:** Single steps with a detail depth of **basic information** and **extended information** are shown.
 - **Full information:** Single steps with a detail depth of **basic information**, **extended information**, and **full information** are shown (technical view).
 - **Show whole tree:** If this option is activated, the entire hierarchy tree automatically opens when the process view is loading. If this option is deactivated, the hierarchy tree is not opened when the process view is loaded.
 - **Show selected process automatically:** If this option is activated, the entire hierarchy tree automatically opened when a process is selected. If this option is deactivated, the hierarchy tree is not opened when a process is selected.

Process information layout

The process information form in the process view provides you with an overview of the actions triggered in the system and the resulting processes. This displays information for the overall process and for the individual steps of a process.

To display the recorded process data:

- To show all the current user's processes, click  (user-specific) in the process data form.
- To show all of an object's processes, select the object in the result list and click  (object-specific) in the process data form.






The following process data appears:



Table 15: Logged process data

Information	Meaning
Activities	Process data display text for the process.
Status	Process status.
Triggered by	User who triggered the process.
Triggered on	Time of action.
Duration	Processing time.
More information	More information on the status, such as attempts to repeat individual steps or a start time for deferred steps.
Process ID	Unique ID (GenProcID). Changes that can be traced back to a single cause are given the same Process ID and are grouped in this way. TIP: To copy a process ID, click to select the process ID and copy the process ID to the clipboard using Ctrl + C .

The following icons are used to identify process statuses:

Table 16: Meaning of the icons for the process statuses

Icon	Meaning
	Processing was completed with success (status Finished).
	The process is currently being processed (status Active).
	An error occurred during processing (status Error).
	Status of processing (status Pending, Delayed, Frozen or Not reached).
	Process dependent on selected process.

Icon	Meaning
	Previous substitute process.
	Next substitute process.



Related topics

- [Layout of logged data changes](#) on page 45

Layout of logged data changes

Individual data changes to the process view are displayed in the document view in the form of a log.

To show recorded data changes:

- To show all data changes that were run within a process, select the process in the process data form and click **Show logs for this process** in the context menu.
- To show all data changes carried out by the current user, click  in the process data form.
- To show all of an object's data changes, select the object in the result list and click  in the process data form.




The data changes log shows the following information.

Table 17: Information on data changes




Information	Meaning
Change history	This shows the affected object and the changed properties. To give a better overview, objects are grouped according to the table to which the dataset belongs.
Change date	Time of action.
Changed by	User who made the changes.
Old value	Column value before the change.
New value	Column value after the change.

Table 18: Meaning of icons in the log

Icon	Meaning
	Column

Icon	Meaning
	Table
	Foreign key
	Object

To track data changes further, you can use the functions below.

- Show a specific object from the change history
Select the entry for the object in the log and click . Loads the object and opens the overview form.
- Show a referenced object from the change history
 - Select the entry for the object in the log and click . The display switches to the originally referenced object and opens the overview form.
 - Select the entry for the object in the log and click . The display switches to the newly referenced object and opens the overview form.

Related topics

- [Process information layout](#) on page 44
- [Analyzing data changes in reports and the TimeTrace](#) on page 28

Schedules in One Identity Manager

Frequently, you need to run processes and calculation tasks at specified time intervals. To make this possible, you can define schedules in One Identity Manager. For example, schedules are required for scheduled execution of processes within process handling or for different calculation tasks in One Identity Manager. A schedule can be in control of several tasks. Execution times are configured in a schedule for the tasks to be executed.

You create and edit schedules in the Designer or in the Manager. The Designer displays all schedules of the system. You can edit individual schedules such as schedules for attestation or schedules for compliance calculations in the Manager. For detailed information about editing schedules in the Manager, refer to the administration guides for the modules.

Schedules are already defined in the default installation of One Identity Manager. Configure these according to your custom requirements.

NOTE: If you run a schedule, all tasks to which the schedule is assigned are executed. Before you use a schedule on a repeated basis, check the effects of the process handling.

Related topics

- [Enabling and disabling schedules](#) on page 47
- [Starting a schedule immediately](#) on page 48
- [Editing schedules](#) on page 49
- [Calculating the time of execution](#) on page 50
- [Scheduled maintenance tasks](#) on page 51

Enabling and disabling schedules

For detailed information about editing schedules in the Manager, refer to the administration guides for the modules.

Prerequisites for running schedules automatically

Enabled schedules are run automatically if the **QBM | Schedules** configuration parameter is set (default).

- In the Designer, check if the configuration parameter is set. If not, set the configuration parameter.

To enable a single schedule in the Designer

1. Select **Base data | General | Schedules** in the Designer.
2. Select the schedule.
3. Set **Enabled**.
4. Select **Database | Save to database** and click **Save**.

To disable a single schedule in the Designer

5. Select **Base data | General | Schedules** in the Designer.
6. Select the schedule.
7. Disable the **Enable** option.
8. Select **Database | Save to database** and click **Save**.

To temporarily stop schedules from running automatically

- In the Designer, set the **QBM | Schedules** configuration parameter.
This stops the schedules from being run automatically. However, you can still start schedules manually.

Related topics

- [Starting a schedule immediately](#) on page 48

Starting a schedule immediately

For detailed information about editing schedules in the Manager, refer to the administration guides for the modules.

NOTE:

- Before you start a schedule manually, check whether other processes will be executed as a result, that also need to be preprocessed by One Identity Manager.
- The last execution time is not updated when the schedule is started manually.

To start a schedule in the Designer immediately

1. In the Designer, select the **Base data | General | Schedules** category.
2. Select the schedule.
3. Click **Start**.
4. Confirm the security prompt with **Yes**.

Editing schedules

For detailed information about editing schedules in the Manager, refer to the administration guides for the modules.

To edit a schedule in the Designer

1. In the Designer, select the **Base data | General | Schedules** category.
2. Select the schedule.
 - OR -
 - Select **Object | New** to create a new schedule.
3. Edit the schedule's master data.
4. Select **Database | Save to database** and click **Save**.



Detailed information about this topic

- [Properties of schedules](#) on page 49

Properties of schedules

Enter the following properties for a schedule.

Table 19: Schedule properties

Property	Meaning
Name	Schedule ID. Translate the given text using the  button.
Description	Detailed description of the schedule. Translate the given text using the  button.
Table	Table whose data can be used by the schedule.
Enabled	Specifies whether the schedule is enabled or not. NOTE: Only active schedules are run.
Time zones	Unique identifier for the time zone that is used for running the schedule. Choose between Universal Time Code or one of the time zones in the menu. NOTE: When you add a new schedule, the time zone is preset to that of the client from which you started the Designer.
Start (date)	The day on which the schedule should be run for the first time. If this day conflicts with the defined interval type, the first run is on the next available

Property	Meaning
	day based on the start date.
Validity period	<p>Period within which the schedule is run.</p> <ul style="list-style-type: none"> If the schedule will be run for an unlimited period, select the Unlimited duration option. To set a validity period, select the Limited duration option and enter the day the schedule will be run for the last time in End (date).
Occurs	<p>Interval in which the task is run. Permitted interval types are Every minute, Hourly, Daily, Weekly, Monthly, and Yearly.</p> <p>For the Weekly interval type, specify the precise weekday. For the Monthly interval type, specify the day of the month (1st to 31st day of the month). For the Yearly interval type, specify the day of the year (1st to 366th day of the year).</p> <p>NOTE: If the schedule is not going to be run until next month because the interval type is Monthly with sub-interval 29, 30, or 31, the last day of the current month is used.</p> <p>Example:</p> <p>A schedule that is run on the 31st day of each month is run on 30th April. In February, the schedule is run on the 28th (or 29th in leap year).</p> <p>Schedules with the interval type Yearly with sub interval 366 are only run in leap year.</p>
Start time	<p>Fixed start type for the Daily, Weekly, Monthly, and Yearly interval types. Enter the time in local format for the chosen time zone.</p> <p>For the interval types Every minute and Hourly, the start time is calculated from the rate of occurrence and the interval type.</p>
Repeat every	Rate of occurrence for running the schedule within the selected time interval. For the Weekly interval type, select at least one weekday.
Last planned run/Next planned run	<p>Execution time calculated by the DBQueue Processor. Execution times are recalculated whilst the schedule is running. The time of the next run is calculated from the interval type, rate of occurrence, and the start time.</p> <p>NOTE: One Identity Manager provides the start information in the time zone of the client where the program was started. Changes due to daylight saving are taken into account.</p>

Calculating the time of execution

The database schedule QBM_PWatchDog on <database> verifies the schedules that need to be run and their start times, at regular intervals. When the database scheduler is run, all tasks are found that are within the valid time period and are enabled. A task is queued in the

DBQueue for each schedule to be run. Then the time for the next scheduled run is calculated through the database schedule and entered in the schedule.

For tasks with the **Every minute** and **Hourly** interval types, the next planned time of execution will be determined from the time at which the database schedule runs, the specified time zone and the execution rate. For schedules with the interval types **Daily**, **Weekly**, **Monthly** and **Yearly**, the next planned time of execution will be determined from the current day, the specified subinterval and the start time within the specified time zone.

Behavior of new schedules

When a new active schedule is added, the next scheduled run is calculated immediately. This is calculated on the basis on the start date or the current date of the next scheduled run. The time between runs is not taken into account.

The task is run if the time of execution has been reached. When the next scheduled run is calculated, this time the interval will be taken into account.

Behavior of modified schedules

If a schedule changes, the next scheduled run is calculated immediately. This is calculated on the basis on the start date or the current date of the next scheduled run. The time between runs is not taken into account.

The task is run if the execution time has been reached. When the next scheduled run is calculated, this time the interval will be taken into account.

Scheduled maintenance tasks

Some calculation tasks for the DBQueue Processor are scheduled. There are schedules set up for these maintenance tasks, which you can customize as required. It is recommended to run maintenance task outside main working hours of the connected clients.

Table 20: DBQueue Processor maintenance tasks

Task	Schedule	Execution
Reduce size of change entries	Reduce logs	Daily
Reduce size of process tracking logs	Reduce logs	Daily
Purge dynamic users	Reduce logs	Daily
Reduce size of process log entries	Reduce logs	Daily
Reduce size of process history	Reduce logs	Daily
Populate calendar	Daily maintenance	Daily

Task	Schedule	Execution
	tasks	
Lock table statistics	Daily maintenance tasks	Daily
Calculate table statistics	Daily maintenance tasks	Daily
Rebuild table index NOTE: Reindexing does not take place for tables that are larger than 1 GB or have more than 1 million data records. Maintenance of these tables must be carried out by the database administrator within the maintenance period.	Daily maintenance tasks	Daily
Delete closed cases in the IT Shop	Daily maintenance tasks	Daily
Clean up DBQueue Processor buffer	Daily maintenance tasks	Daily
Calculate statistics for data contents	Weekly maintenance tasks	Weekly
Set RowLock	Weekly maintenance tasks	Weekly

Related topics

- [Schedules in One Identity Manager](#) on page 47

Mail templates in One Identity Manager

One Identity Manager provides the means to send email notifications. For example, notifications can be sent from process handling, about attestation or the status of IT Shop requests.

You use mail templates to design the appearance and content of email notifications. A mail template consists of general master data such as target format, important, or mail notification confidentiality and one or more mail definitions. The mail text is defined in several languages in the mail template. The recipient's language preferences are taken into account when an email notification is generated.

Create and edit mail templates in the Designer or in the Manager. The Designer displays all mail templates of the system. You can edit individual mail templates such as mail templates for requests in IT Shop or mail templates for attestation in the Manager. For detailed information about editing mail templates in the Manager, refer to the administration guides for the modules.

A Designer is integrated in the Manager and in the Mail Template Editor to simplify writing notifications. In the Mail Template Editor you can create email texts with Microsoft Word style editing and formatting functions and a preview of the email.

Email notifications are generated through default processes during process handling. To use email notifications based on mail templates for other business procedures, for example creating user accounts, you have to create custom mail templates and processes. Use the MailComponent process component to provide the SendRichMail process task for this purpose.

Related topics

- [Creating and editing mail templates](#) on page 54
- [General properties of a mail template](#) on page 55
- [Creating and editing an email definition](#) on page 56
- [Customizing email signatures](#) on page 63

Creating and editing mail templates

For detailed information about editing mail templates in the Manager, refer to the administration guides for the modules.

To edit a mail template in the Designer

1. In the Designer, select the **Mail templates** category.
2. Select the mail template and start Mail Template Editor using the **Edit mail template** task.

To create a new mail template in the Designer

1. In the Designer, select the **Mail templates** category.
2. Start Mail Template Editor using the **Create a new mail template** task.

Related topics

- [Copying a mail template](#) on page 54
- [Creating a mail preview](#) on page 55

Copying a mail template

For detailed information about editing mail templates in the Manager, refer to the administration guides for the modules.

To copy a mail template in the Designer

1. In the Designer, select the **Mail templates** category.
2. Select the mail template you want to copy and start the Mail Template Editor using the **Edit mail template**.
3. Select **Mail template | Copy mail template**.
4. Enter the name of the new mail template and click **OK**.

The new mail template is displayed in the Mail Template Editor. Now, you can edit the mail template.

Related topics

- [Creating and editing mail templates](#) on page 54
- [Creating a mail preview](#) on page 55

Creating a mail preview



For detailed information about editing mail templates in the Manager, refer to the administration guides for the modules.

To display a mail template preview in the Designer

1. In the Designer, select the **Mail templates** category.
2. Select the mail template and start Mail Template Editor using the **Edit mail template** task.
3. Select **Mail templates | Mail preview**.
4. Select the base object and click **OK**.

General properties of a mail template

Table 21: Mail template properties

Property	Meaning
Mail template	Name of the mail template. This name will be used to display the mail templates in the administration tools and in the Web Portal. Translate the given text using the  button.
Base object	Mail template base object. A base object only needs to be entered if the mail definition properties of the base object are referenced.
Report (parameter set)	Report, made available through the mail template.
Description	Mail template description. Translate the given text using the  button.
Target format	Format in which to generate email notification. Permitted values are: <ul style="list-style-type: none">• HTML: The email notification is formatted in HTML. Text formats, for example, different fonts, colored fonts, or other text formatting, can be included in HTML format.• TXT: The email notification is formatted as text. Text format does not support bold, italics, or colored font, or other text formatting. Images displayed directly in the message are not supported.
Design type	Design in which to generate the email notification. Permitted values are: <ul style="list-style-type: none">• Mail template: The generated email notification contains the mail body in accordance with the mail definition.• Report: The generated email notification contains the report

Property	Meaning
	<p>specified under Report (parameter set) as its mail body.</p> <ul style="list-style-type: none"> • Mail template, report in attachment: The generated email notification contains the mail body in accordance with the mail definition. The report specified under Report (parameter set) is attached to the notification as a PDF file.
Importance	Importance for the email notification. Permitted values are Low , Normal , and High .
Confidentiality	Confidentiality for the email notification. Permitted values are Normal , Personal , Private , and Confidential .
Can unsubscribe	Specifies whether the recipient can unsubscribe email notification. If this option is set, the emails can be unsubscribed through the Web Portal.
Deactivated	Specifies whether this mail template is disabled.
Mail definition	Unique name for the mail definition.
Language	Language that applies to the mail template. The recipient's language preferences are taken into account when an email notification is generated.
Subject	Subject of the email message.
Mail body	Content of the email message.

Related topics

- [Creating and editing an email definition](#) on page 56

Creating and editing an email definition

Mail texts can be defined in these different languages in a mail template. This ensures that the language of the recipient is taken into account when the email is generated.

To create a new mail definition

1. Open the mail template in the Mail Template Editor.
2. Click the  button next to the **Mail definition** list.
3. In the result list, select the language for the mail definition in the **Language** menu.
All active languages are shown. To use another language, in the Designer, enable the corresponding countries. For more detailed information, see the *One Identity Manager Configuration Guide*.
4. Enter the subject in **Subject**.

5. Edit the mail text in the **Mail definition** view with the help of the Mail Text Editor.
6. Save the changes.

To edit an existing mail definition

1. Open the mail template in the Mail Template Editor.
2. Select the language in **Mail definition**.
3. Edit the mail subject line and the body text.
4. Save the changes.

Related topics

- [Creating and editing mail templates](#) on page 54
- [Using base object properties](#) on page 57
- [Use of hyperlinks in the Web Portal](#) on page 58
- [Default functions for creating hyperlinks](#) on page 59
- [Using process parameters in hyperlinks](#) on page 62
- [Customizing email signatures](#) on page 63

Using base object properties

In the subject line and body text of a mail definition, you can use all properties of the object entered under **Base object**. You can also use the object properties that are referenced by foreign key relation.

To access properties use dollar notation. For more detailed information, see the *One Identity Manager Configuration Guide*.

Example

An IT Shop requester should receive email notification about the status of the request.

Table 22: Email notification properties

Property	Value
Base object	PersonWantsOrg
Subject	"\$DisplayOrg[D]\$" status change
Mail body	Dear \$FK(UID_PersonOrdered).Salutation[D]\$ \$FK(UID_PersonOrdered).FirstName\$ \$FK(UID_PersonOrdered).LastName\$, The status was changed on the following request on \$DateHead:Date\$.

Property Value

Requested by: \$DisplayPersonInserted\$
Requested by: \$DisplayPersonInserted\$
Reason: \$OrderReason\$
Current status of your request:
Approval: granted
Approver: \$DisplayPersonHead[D]\$
Reason: \$ReasonHead[D]\$

The generated email notification could look like the following, for example, once it has been formatted.

Subject: "Service Notebook" status change

Dear Ms Monica Fletcher,

The status was changed on the following request on 03/08/2011 11:14:53.

Product: Service Notebook
Requested by: Fletcher, Monica
Reason: For on-site processing

Current status for your request:

Approval: granted
Approver: Rippington, Rudiger
Reason: approved

Related topics

- [Creating and editing an email definition](#) on page 56

Use of hyperlinks in the Web Portal

You can add hyperlinks to the Web Portal in the mail text of a mail definition. If the recipient clicks on the hyperlink in the email, the Web Portal opens on that web page and further actions can be carried out. In the default version, this method is implemented for IT Shop requests, in Identity Audit, policy checks and attestations.

Prerequisites for using this method

- The **QER | WebPortal | BaseURL** configuration parameter is enabled and contains the URL path to the Web Portal. You edit the configuration parameter in the Designer.

http://<server name>/<application>

with:

<server name> = name of server

<application> = path to the Web Portal installation directory

To add a hyperlink to the Web Portal in the mail text

1. Click the position in the mail text of the mail definition where you want to insert a hyperlink.
2. Open the **Hyperlink** context menu and enter the following information.
 - **Display text:** Enter a caption for the hyperlink.
 - **Link to:** Select the **File or website** option.
 - **Address:** Enter the address of the page in the Web Portal that you want to open.

NOTE: One Identity Manager provides a number of default functions that you can use to create hyperlinks in the Web Portal.
3. To accept the input, click **OK**.

Related topics

- [Creating and editing an email definition](#) on page 56
- [Default functions for creating hyperlinks](#) on page 59
- [Using process parameters in hyperlinks](#) on page 62

Default functions for creating hyperlinks

Several default functions are available to help you create hyperlinks. You can use the functions directly when you add a hyperlink in the mail body of a mail definition or in processes

Direct function input

You can reference a function when you add a hyperlink in the **Address** field of the **Hyperlink** context menu.

`$Script(<Function>)$`

Example:

`$Script(VI_BuildITShopLink_Show_for_Requester)$`

`$Script(VI_BuildAttestationLink_Approve)$`

`$Script(VI_BuildComplianceLink_Show)$`

`$Script(VI_BuildQERPolicyLink_Show)$`

Default functions for requests

The `VI_BuildAttestationLinks` script contains a collection of default functions for composing hyperlinks to directly grant or deny approval of requests from email notifications.

Table 23: Functions of the VI_BuildAttestationLinks script

Function	Usage
VI_BuildAttestationLink_Show	Opens the attestation page in the Web Portal.
VI_BuildAttestationLink_Approve	Approves an attestation and opens the attestation page in the Web Portal.
VI_BuildAttestationLink_Deny	Denies an attestation and opens the attestation page in the Web Portal.
VI_BuildAttestationLink_AnswerQuestion	Opens the page for answering a question in the Web Portal.
VI_BuildAttestationLink_Pending	Opens the page with pending attestations in the Web Portal.

Default functions for IT Shop requests

The VI_BuildITShopLinks script contains a collection of default functions for composing hyperlinks to directly grant or deny approval of IT Shop requests from email notifications.

Table 24: Functions of the VI_BuildITShopLinks script

Function	Usage
VI_BuildITShopLink_Show_for_Approver	Opens the overview page for request approval in the Web Portal.
VI_BuildITShopLink_Show_for_Requester	Opens the overview page for requests in the Web Portal.
VI_BuildITShopLink_Approve	Approves a request and opens the approvals page in the Web Portal.
VI_BuildITShopLink_Deny	Denies a request and opens the approvals page in the Web Portal.
VI_BuildITShopLink_AnswerQuestion	Opens the page for answering a question in the Web Portal.
VI_BuildITShopLink_Reject	Opens the page with denied requests in the Web Portal.
VI_BuildAttestationLink_Pending	Opens the page with pending requests in the Web Portal.
VI_BuildITShopLink_Unsubscribe	Creates the link for canceling email notification. This function is used in processes for unsubscribing email notifications.

Default functions for identity audit

The `VI_BuildComplianceLinks` script contains a collection of default functions for composing hyperlinks for exception approval of rule violations.

Table 25: Functions of the `VI_BuildComplianceLinks` script

Function	Usage
<code>VI_BuildComplianceLink_Show</code>	Opens the exception approval page in the Web Portal.

Default function for policy checking

The `VI_BuildComplianceLinks` script contains a collection of default functions for composing hyperlinks for exception approval of policy violations.

Table 26: Functions of the `VI_BuildComplianceLinks` script

Function	Usage
<code>VI_BuildQERPolicyLink_Show</code>	Opens the exception approval page in the Web Portal.

Related topics

- [Creating and editing an email definition](#) on page 56
- [Use of hyperlinks in the Web Portal](#) on page 58
- [Using process parameters in hyperlinks](#) on page 62

Using scripts in mail templates

For more information about using scripts, see the *One Identity Manager Configuration Guide*.

In mail templates, any parameters can be used when calling a script.

Syntax

```
$SCRIPT(ScriptName, "Options")$
```

The `Options` parameter is optional and is passed as a string. Custom parameters can be coded in any way in this string. Quotes (") are masked by doubling. In the script, the parameter is passed as the second parameter after the base object. The base object can be either `IEntity` or `ISingleDBObject`.

Script example

```
Public Function CCC_Script(baseEntity as IEntity, options as String) as String  
Dim arr = options.Split("|"c)
```

```
Dim p1 = arr(0)
Dim p2 = arr(1)
End Function
```

Example of use in mail templates

```
$SCRIPT(CCC_Script, "Param1|Param2")$
```

Support for dynamically generated HTML code in mail templates

For detailed information about using dollar (\$) notation, see the *One Identity Manager Configuration Guide*.

In dollar notation, you can select the **HTML** type. The HTML code is accepted in scripts and columns but not masked. There is no security check.

Example script with HTML code:

```
Public Function CCC_HtmlMailText(obj As IEntity) As String
Return "<h1 style='color:red'>" & obj.Display & "</h1>"
End Function
```

Call in mail template:

```
$SCRIPT(CCC_HtmlMailText):HTML$
```

Using process parameters in hyperlinks

Use this method to pass additional parameters to a function. Email notifications are generated during the process handling. Use the MailComponent process component to provide the SendRichMail process task for this purpose.

To compile a hyperlink in a process, for example, cancellation of email notifications, use the [ParamName 1-n] and [ParamValue 1-n] free process parameters of the process component.

NOTE: By default, 10 pairs of parameters are available. If this number is not sufficient, you can create additional custom process parameters, which you can then use as parameters in the Process Editor.

Example for populating the process parameters

```
ParamName1: Value = "NoSubscription"
```

```
ParamValue1: Value = VI_BuildITShopLink_Unsubscribe (values("UID_RichMail").ToString())
```

UID_RichMail is determined by the pre-script for generating within the process and passed to the function.

Take implementation examples from base object PersonWantsOrg processes that are triggered by changes to IT Shop requests.

The process parameter is referenced when a hyperlink is inserted in a mail definition using the **Hyperlink** menu in the **Address input** field:

```
$PC(<ParamName>)$
```

Example:

```
$PC(NoSubscription)$
```

For more detailed information about creating and editing processes, see the *One Identity Manager Configuration Guide*.

Related topics

- [Creating and editing an email definition](#) on page 56
- [Use of hyperlinks in the Web Portal](#) on page 58
- [Default functions for creating hyperlinks](#) on page 59

Defining default fonts and default font sizes for mail templates

To define default fonts for mail templates

- In the Designer, set the **Common | MailNotification | DefaultFont** configuration parameter and enter a font. The default value is **Time New Roman**.

To define default font sizes for mail templates

- In the Designer, set the **Common | MailNotification | DefaultFontSize** configuration parameter and enter a font size. The default value is **12**.

Customizing email signatures

Configure the email signature for mail templates using the following configuration parameter. Edit the configuration parameters in the Designer.

Table 27: Configuration parameters for email signatures

Configuration parameter	Description
Common MailNotification Signature	Data for the signature in email automatically generated from mail templates.
Common MailNotification Signature Caption	Signature under the salutation.
Common MailNotification Signature Company	Company name.
Common MailNotification Signature Link	Link to the company's website.
Common MailNotification Signature LinkDisplay	Display text for the link to the company's website.

VI_GetRichMailSignature combines the components of an email signature according to the configuration parameters for use in mail templates.

Password policies in One Identity Manager

One Identity Manager provides you with support for creating complex password policies, for example, for system user passwords, the employees' central password as well as passwords for individual target systems. Password policies apply not only when the user enters a password but also when random passwords are generated.

Predefined password policies are supplied with the default installation that you can use or customize if required. You can also define your own password policies.

Create and edit mail password policies in the Designer or in the Manager. The Designer displays all password policies of the system. You can edit individual password policies, such as password policies for target systems or password policies for the central password of employees, in the Manager.

For detailed information about password policies for employees, see the *One Identity Manager Identity Management Base Module Administration Guide*. For detailed information about password policies for user accounts, see the administration guides of the target systems.

Detailed information about this topic

- [Predefined password policies](#) on page 66
- [Using password policies](#) on page 66
- [Using password policies](#) on page 66
- [Editing password policies](#) on page 68
- [Custom scripts for password requirements](#) on page 72
- [Password exclusion list](#) on page 74
- [Checking a password](#) on page 75
- [Testing password generation](#) on page 75
- [Password expiry](#) on page 76
- [Displaying locked employees and system users](#) on page 76

Predefined password policies

You can customize predefined password policies to meet your own requirements, if necessary.

Password for logging in to One Identity Manager

The **One Identity Manager password policy** is applied for logging in to One Identity Manager. This password policy defines the settings for the system user passwords (DialogUser.Password and Person.DialogUserPassword) as well as the passcode for a one time log in on the Web Portal (Person.Passcode).

NOTE: The **One Identity Manager password policy** is marked as the default policy. This password policy is applied if no other password policy can be found for employees, user accounts, or system users.

For detailed information about password policies for employees, see the *One Identity Manager Identity Management Base Module Administration Guide*.

Password policy for forming employees' central passwords

An employee's central password is formed from the target system specific user accounts by respective configuration. The **Employee central password policy** defines the settings for the (Person.CentralPassword) central password. Members of the **Identity Management | Employees | Administrators** application role can adjust this password policy.

IMPORTANT: Ensure that the **Employee central password policy** does not violate the target system-specific requirements for passwords.

For detailed information about password policies for employees, see the *One Identity Manager Identity Management Base Module Administration Guide*.

Password policies for user accounts

Predefined password policies are provided, which you can apply to the user account password columns of the user accounts. You can define password policies for user accounts for various base objects, for example, for account definitions, manage levels, or target systems.

For detailed information about password policies for user accounts, see the administration guides of the target systems.

Using password policies

You can assign password policies to system user passwords, the employees' central password as well as passwords for individual target systems. Assign a password policy to the base object to which it should apply.

- The predefined **One Identity Manager password policy** password policy is assigned to the (DialogUser.Password and Person.DialogUserPassword) system user passwords as well as the passcode of the employee (Person.Passcode).
- The predefined password policy **Employee central password policy** is assigned to the employee's central password (Person.CentralPassword).
- The password policies for target systems are assigned to the password columns of the user accounts.

For detailed information about password policies for employees, see the *One Identity Manager Identity Management Base Module Administration Guide*. For detailed information about password policies for user accounts, see the administration guides of the target systems.

NOTE:

- In the QBMVPwdPolicyColumns view, you define which base objects and password columns are permitted for password policies and the order in which the password policies are to be applied. If necessary, you can add your own references to customize the view in the Designer.
- If you create new custom tables with password columns, in the Designer, assign the VI.Common.Customizer.PwdPolicyColumnEntityLogic customizer to the table definition.

For more detailed information, see the *One Identity Manager Configuration Guide*.

If you want to apply another password policy to the password columns, change the password policy assignment to the base object.

To change a password policy's assignment

1. In the Designer, select the **Base data | Security settings | Password policies** category.
2. Select the password policy in the result list.
3. Select the **Assign objects** task.
4. In the **Assignments** pane, select the assignment you want to change.
5. From the **Password Policies** menu, select the new password policy you want to apply.
6. Save the changes.

To reassign a password policy

1. In the Designer, select **Base data | Security settings | Password policies**.
2. Select the password policy in the result list.

3. Click **Add** in the **Assignments** section and enter the following data.

Table 28: Assigning a password policy

Property	Description
Password column	The password column's identifier.
Apply to	Application scope of the password policy. To specify an application scope <ol style="list-style-type: none">a. Click the ... button beside the input field.b. Select the table which contains the password column under Table.c. Select the specific base objects under Apply to.d. Click OK.

4. Save the changes.

Editing password policies

To edit a password policy

1. In the Designer, select the **Base data | Security settings | Password policies** category.
2. Select the password policy in the List Editor.
- OR -
Select the **Object | New** menu item to create a new password policy.
3. Edit the password policy's master data.
4. Save the changes.




Detailed information about this topic

- [General master data for password policies](#) on page 68
- [Policy settings](#) on page 69
- [Character classes for passwords](#) on page 70
- [Custom scripts for password requirements](#) on page 72

General master data for password policies

Enter the following master data for a password policy.

Table 29: Master data for a password policy

Property	Meaning
Display name	Password policy name. Translate the given text using the  button.
Description	Text field for additional explanation. Translate the given text using the  button.
Error Message	Custom error message generated if the policy is not fulfilled. Translate the given text using the  button.
Owner (Application Role)	Application roles whose members can configure the password policies.
Default policy	Mark as default policy for passwords. NOTE: The One Identity Manager password policy is marked as the default policy. This password policy is applied if no other password policy can be found for employees, user accounts, or system users.

Related topics

- [Editing password policies](#) on page 68

Policy settings

Define the following settings for a password policy on the **Password** tab.

Table 30: Policy settings

Property	Meaning
Initial password	Initial password for newly created user accounts. The initial password is used if a password is not entered when you create a user account or if a random password is not generated.
Password confirmation	Reconfirm password.
Minimum Length	Minimum length of the password. Specify the number of characters a password must have.
Max. length	Maximum length of the password. Specify the number of characters a password can have. The maximum permitted value is 256 .
Max. errors	Maximum number of errors. Set the number of invalid passwords attempts. Only taken into account when logging in

Property	Meaning
	<p>to One Identity Manager.</p> <p>This data is only taken into account if the One Identity Manager login was through a system user or employee based authentication module. If a user has reached the number of maximum failed logins, the employee or system user can no longer log in to One Identity Manager.</p> <p>You can use the Password Reset Portal to reset the passwords of employees and system users who have been blocked. For more detailed information, see the <i>One Identity Manager Web Portal User Guide</i>.</p>
Validity period	Maximum age of the password. Enter the length of time a password can be used before it expires.
Password history	Enter the number of passwords to be saved. If, for example, a value of 5 is entered, the user's last five passwords are stored.
Minimum password strength	Specifies how secure the password must be. The higher the password strength, the more secure it is. The value 0 means that the password strength is not tested. The values 1 , 2 , 3 and 4 specify the required complexity of the password. The value 1 represents the lowest requirements in terms of password strength. The value 4 requires the highest level of complexity.
Name properties denied	Specifies whether name properties are permitted in the password. If this option is set, name properties are not permitted in passwords. The values of these columns are taken into account if the Contains name properties for password check option is set. In the Designer, adjust this option in the column definition. For more detailed information, see the <i>One Identity Manager Configuration Guide</i> .

Related topics

- [Editing password policies](#) on page 68

Character classes for passwords

Use the **Character classes** tab to specify which characters are permitted for a password.

Table 31: Character classes for passwords

Property	Meaning
Min. number letters	Specifies the minimum number of alphabetical characters the password must contain.
Min. number lowercase	Specifies the minimum number of lowercase letters the password must contain.
Min. number uppercase	Specifies the minimum number of uppercase letters the password must contain.
Min. number digits	Specifies the minimum number of digits the password must contain.
Min. number special characters	Specifies the minimum number of special characters the password must contain.
Permitted special characters	List of permitted special characters.
Max. identical characters in total	Specifies the maximum number of identical characters that can be present in the password in total.
Max. identical characters in succession	Specifies the maximum number of identical character that can be repeated after each other.
Denied special characters	List of special characters that are not permitted.
Do not generate lowercase letters	Specifies whether or not a generated password can contain lowercase letters. This setting only applies when passwords are generated.
Do not generate uppercase letters	Specifies whether or not a generated password can contain uppercase letters. This setting only applies when passwords are generated.
Do not generate digits	Specifies whether or not a generated password can contain digits. This setting only applies when passwords are generated.

Property	Meaning
Do not generate special characters	Specifies whether or not a generated password can contain special characters. If this option is set, only letters, numbers, and spaces are allowed in passwords. This setting only applies when passwords are generated.

Related topics

- [Editing password policies](#) on page 68

Custom scripts for password requirements

You can implement custom scripts for testing and generating passwords if the password requirements cannot be mapped with the existing settings options. Scripts are applied in addition to the other settings.

Detailed information about this topic

- [Script for checking passwords](#) on page 72
- [Script for generating a password](#) on page 73

Script for checking passwords

You can implement a script if additional policies need to be used for checking a password that cannot be mapped with the available settings.

Syntax of check scripts

```
Public Sub CCC_CustomPwdValidate( policy As VI.DB.Passwords.PasswordPolicy, spwd As System.Security.SecureString)
```

With parameters:

policy = password policy object

spwd = password to check

TIP: To use a base object, take the Entity property of the PasswordPolicy class.

Example of a script that checks a password

A password cannot start with ? or ! . The password cannot start with three identical characters. The script checks a given password for validity.


```

Public Sub CCC_PwdValidate( policy As VI.DB.Passwords.PasswordPolicy, spwd As
System.Security.SecureString)
    Dim pwd = spwd.ToInsecureArray()
    If pwd.Length>0
        If pwd(0)="?" Or pwd(0)="!"
            Throw New Exception(#LD("Password can't start with '?' or '!")#)
        End If
    End If
    If pwd.Length>2
        If pwd(0) = pwd(1) AndAlso pwd(1) = pwd(2)
            Throw New Exception(#LD("Invalid character sequence in password")#)
        End If
    End If
End Sub

```

To use a custom script for checking a password

1. In the Designer, create your script in the **Script Library** category.
2. Edit the password policy.
 - a. In the Designer, select the **Base data | Security settings | Password policies** category.
 - b. In the List Editor, select the password policy.
 - c. On the **Scripts** tab, enter the name of the script to be used to check a password in the **Check script** field.
 - d. Save the changes.

Related topics

- [Script for generating a password](#) on page 73
- [Editing password policies](#) on page 68

Script for generating a password

You can implement a generating script if additional policies need to be used for generating a random password, which cannot be mapped with the available settings.

Syntax for generating script

```

Public Sub CCC_PwdGenerate( policy As VI.DB.Passwords.PasswordPolicy, spwd As
System.Security.SecureString)

```

With parameters:

policy = password policy object

spwd = generated password

TIP: To use a base object, take the Entity property of the PasswordPolicy class.

Example for a script to generate a password

The script replaces the ? and ! characters at the beginning of random passwords with _.

```
Public Sub CCC_PwdGenerate( policy As VI.DB.Passwords.PasswordPolicy, spwd As System.Security.SecureString)
```

```
    Dim pwd = spwd.ToInsecureArray()
```

```
    ' replace invalid characters at first position
```

```
    If pwd.Length>0
```

```
        If pwd(0)="?" Or pwd(0)="!"
```

```
            spwd.SetAt(0, CChar("_"))
```

```
        End If
```

```
    End If
```

```
End Sub
```

To use a custom script for generating a password

1. In the Designer, create your script in the **Script Library** category.
2. Edit the password policy.
 - a. In the Designer, select the **Base data | Security settings | Password policies** category.
 - b. In the List Editor, select the password policy.
 - c. On the **Scripts** tab, enter the name of the script to be used to generate a password in the **Generating script** field.
 - d. Save the changes.

Related topics

- [Script for checking passwords](#) on page 72
- [Editing password policies](#) on page 68

Password exclusion list

You can add words to a list of restricted terms to prohibit them from being used in passwords.

NOTE: The restricted list applies globally to all password policies.

To add a term to the restricted list

1. In the Designer, select the **Base Data | Security settings | Restricted passwords** category.
2. Create a new entry with the **Object | New** menu item and enter the term you want to exclude from the list.
3. Save the changes.

Checking a password

When you check a password, all the password policy settings, custom scripts, and the restricted passwords are taken into account.

To check if a password conforms to the password policy

1. In the Designer, select the **Base data | Security settings | Password policies** category.
2. Select the password policy in the List Editor.
3. Select the **Test** tab.
4. Select the table and object to be tested in **Base object for test**.
5. Enter a password in **Enter password to test**.

A display next to the password shows whether it is valid or not.

Testing password generation

When you generate a password, all the password policy settings, custom scripts and the restricted passwords are taken into account.

To generate a password that conforms to the password policy

1. In the Designer, select the **Base data | Security settings | Password policies** category.
2. In the List Editor, select the password policy.
3. Select the **Test** tab.
4. Click **Generate**.

This generates and displays a password.

Password expiry

Employee and system user based authentication modules support password expiry. The columns `Person.PasswordLastSet` and `DialogUser.PasswordLastSet` contain the time and date that the password was last changed.

There are different ways to inform employees that their password is going to expire:

- Users are alerted about their password expiring when they log in to One Identity Manager and can change their password if necessary.
- For employee-based authentication modules, the system sends reminder notifications in relation to expiring passwords as of seven days in advance of the password expiry date.
 - You can adjust the time in days in the **Common | Authentication | DialogUserPasswordReminder** configuration parameter. Edit the configuration parameter in the Designer.
 - The notifications are triggered in accordance with the **Reminder system user password expires** schedule and use the **Employee - system user password expires** mail template. You can adjust the schedule and mail template in the Designer if required.

TIP: To prevent passwords expiring for service account, for example, you can set **Password never expires** (`DialogUser.PasswordNeverExpires`) in the Designer for the affected system users.

For detailed information about the One Identity Manager authentication modules and about editing system users, see the *One Identity Manager Authorization and Authentication Guide*.

Related topics

- [Schedules in One Identity Manager](#) on page 47
- [Mail templates in One Identity Manager](#) on page 53

Displaying locked employees and system users

If a user has reached the number of maximum failed logins, the employee or system user can no longer log in to One Identity Manager.

- Locked employees are displayed in the Manager in the **Employees | Locked employees** category. An additional message referring to the locked login is also displayed on the overview form for an employee.

- Locked system users are displayed in the Designer in the **Permissions | System users | Locked system users** category. An additional message referring to the locked login is also displayed on the overview form for a system user.

You can reset the passwords of employees and system users who have been blocked in Password Reset Portal. For more detailed information, see the *One Identity Manager Web Portal User Guide*.

Working with change labels

Define change labels under which changes are grouped together in order to swap data between development and test databases as well as the productive database.

Change labels contain changes to individual properties of an object at a certain point in time.

IMPORTANT: Consistently book all changes to an object to the change label. It is not possible to add changes of individual properties to the change label at a later date.

In the Database Transporter program, change labels are provided as an export criterion for creating custom configuration packages. When you create a custom configuration package, single object properties are added to the transport package. The properties contain the values given at the time they were added.

You can create and edit change labels in different One Identity Manager tools. The procedure is similar in all tools. Change labels are allocated using different methods depending on the One Identity Manager tool. Changes are normally allocated before or on saving the changes in the database.

Detailed information about this topic

- [Creating and editing change labels](#) on page 78
- [Displaying content of a change label](#) on page 80
- [Booking changes to a change label retrospectively](#) on page 80
- [Deleting change labels](#) on page 82
- [Release management](#) on page 82

Creating and editing change labels

NOTE: To use change labels in the Manager, the Manager must be running in expert mode.

To create or edit change labels in the Designer





1. Select **Database | Change management** in the Designer.
2. In the **Change management** dialog next to the **Change labels** menu, click .
3. In the **Change labels** dialog, create a new change label by clicking .
- OR -
Select a change label from the list and open the edit view using .
4. Enter the following label data.

Table 32: Change label properties

Property	Meaning
Change label	Change label name. This name is used to select the change label for allocating the changes or creating a customer transport package.
Description	Detailed description of the change label
Parent change label	Specifies a parent label (optional).
Status	Status of object changes, such as Development , Test , Production .
Status comments	Additional comments in relation to the status
Comment	Additional information to enable tracking of changes to a change label
Label type	Label type for more detailed classification Permitted values are Change , Other , IT Shop , Keyword and Release . The Change label type is used by default.
Locked	Indicates if the change label is locked. If a change label is locked, no further changes can be booked to this label.

5. Click the  button.
6. Click **OK**.

The **Change label** dialog closes. The change label is pre-selected in the **Change management** dialog in the **Change label** menu.

Related topics

- [Displaying content of a change label](#) on page 80
- [Booking changes to a change label retrospectively](#) on page 80
- [Deleting change labels](#) on page 82
- [Release management](#) on page 82

Displaying content of a change label

To display the contents of a change label

1. Select **Database | Change management** in the Designer.
2. In the **Change management** dialog, select the relevant change label in the **Change label** menu.

The objects that are already assigned to the change label are displayed in the **Tagged changes** view. The following functions are available:

- To search within a change label, use **Ctrl +F**.
- To restrict the information displayed to a single change label, click the arrow in the table header of a column and enter a filter text.
- Use the context menu to change the order of the changes within a change label. This order is taken into account when the changes are transported.
- The content of a change for an object is defined in XML format. It specifies whether a property is created, changed, or deleted with a change. To display an XML definition of a change, select **Edit change data**.

TIP: You will find an overview of change labels in **Base data | General | Change label** in the Designer.

Related topics

- [Creating and editing change labels](#) on page 78
- [Booking changes to a change label retrospectively](#) on page 80


Booking changes to a change label retrospectively



You can select individual objects and their dependencies from any objects in the database and book them to a change label.

In certain cases, it is necessary to add the dependent objects to the change label as well. For example, if processes are being transported, the dependent process steps, process parameters, and events should also be transported. This is also true for approval policies, approval workflows, approval steps, and approval procedures.

IMPORTANT: Consistently book all changes to an object to the change label. It is not possible to add changes of individual properties to the change label at a later date.


To book objects to a change label retrospectively

1. Select **Database | Change management** in the Designer.
2. Select the change label in the **Change labels** menu in the **Change management** dialog.
3. In the **Table** list, select the database table from which you want to copy objects to the change label.
4. To limit the number of objects found
 - a. Next to the **Table** menu, click the button .
 - b. Enter a condition in **Filter**.

Enter the condition as a WHERE clause for a database query. You can enter the database query directly as in SQL or use the wizard, which you open by clicking on the  button next to the field.
 - c. Click **Log in**.
5. To map dependent objects
 - a. Next to the **Table** menu, click the button .

This opens a separate selection window that displays the ChildRelation (CR), ForeignKey (FK) and many-to-many relations for the selected database table.

 - b. Select the relevant table relations in **Table relations**.

The objects that are connected by means of these table relations are also marked with the change label when an object is selected and assigned.
6. Select the relevant objects in **Objects**, click .

| **TIP:** To select more than one object, use **Shift + select** or **Ctrl + select**.


TIP: You can also use the properties of an object to add that object to a change label.

- Select the object and open the **Properties** context menu. You can see which change labels the object belongs to on the **Change labels** tag.

Here you can assign a new or an existing change label to the object and its dependent objects.

To remove objects from a change label

1. Select **Database | Change management** in the Designer.
2. In the **Change management** dialog, use the **Change labels** menu to select the change label.
3. In **Tagged changes**, select the objects you want to remove from the change label.



| **TIP:** To select more than one object, use **Shift + select** or **Ctrl + select**.
4. Click the  button to remove the objects from the change label.

Related topics

- [Creating and editing change labels](#) on page 78
- [Displaying content of a change label](#) on page 80

Deleting change labels

To delete a change label

1. Select **Database | Change management** in the Designer.
2. In the **Change management** dialog next to the **Change labels** menu, click .
3. In the **Change label** dialog, select the change label and click the button .
4. Confirm the security prompt with **Yes**.
5. To close the **Change label** dialog, click **Abort**.
6. To close the **Change management** dialog, click **OK**.

Release management

You can combine several change labels into one release. There is a report that provides you with an overview of the changes in a release.

To combine change labels into one release

1. In the Designer, select the **Base data | General | Release management** category.
2. Select the **Object | New** menu item.
3. In the edit view, enter a minimum of the following information in the edit view of the **Properties** tab.
 - **Change label**: Enter the name of the change label.
 - **Label type**: Select the **Release** type.
4. In the edit view, select the **Change label** tab and assign the change labels you want to combine into one release.

To display a report about a release

1. In the Designer, select the **Base data | General | Release management | <release name>** category.

This opens the **Change management release overview** report.

Related topics

- [Creating and editing change labels](#) on page 78

Checking data consistency

The consistency check provides different tests for analyzing data objects and to ascertain the current state of their data. In addition to predefined tests, you can define your own tests and, if necessary, run a repair.

You should run a consistency check at regular intervals, as well as after significant changes to the system configuration.

You can run consistency checks in the Manager and in the Designer. The following special cases apply:

- Database tests are run in their entirety in the Manager and the Designer.
- Table tests and object tests in the Manager check the application model data.
- Table tests and object tests in the Designer check the data of the system data model.

Detailed information about this topic

- [Notes on the consistency check](#) on page 84
- [Starting a consistency check](#) on page 85
- [Logging test results](#) on page 88
- [Repairing errors](#) on page 89

Notes on the consistency check


- It is recommended to run consistency checks with an administrative system user.
- To use the Consistency Editor, the user needs the **Option to call a consistency check for a database** (Common_ConsistencyCheck) program function.
- To use the repair function in the Consistency Editor, the user needs the **Option to start automatic consistency check repair function** (Common_ConsistencyCheck_Repair) program function.
- Consistency checks of type **Object test** are always run in the context of the user currently logged in. If the user does not have any permissions for a certain object, errors may not be identified or repairing errors may fail.

Starting a consistency check

To run a consistency check

1. Start Consistency Editor in the Designer or in the Manager by selecting **Database | Check data consistency**.


During start up, One Identity Manager schema table definitions are loaded and database objects are made available for testing.

2. Specify the test settings.
 - a. In the Consistency Editor toolbar, click .
 - b. Enable the test that is to be run and adjust the test settings further if necessary.
 - c. Click **OK**.

NOTE: In the Designer, the test settings dialog opens immediately after the Consistency Editor is started.

3. Start the consistency check. The following test procedures are available in the Consistency Editor for this:

- Checking all test objects

Start this check by pressing .

NOTE: To exclude individual test objects from the check, use the **Disable** button to disable these test objects in the list view before the check starts.

- Checking individual test objects

In the list view, select the relevant test objects and start this check by selecting **Test**.

TIP: Use **Shift + select** or **Ctrl + select** to select more than one test object to be checked.

NOTE: To stop a check that is in progress, click  in the Consistency Editor toolbar.

4. Verify error output.
5. Repair errors if necessary.

Related topics

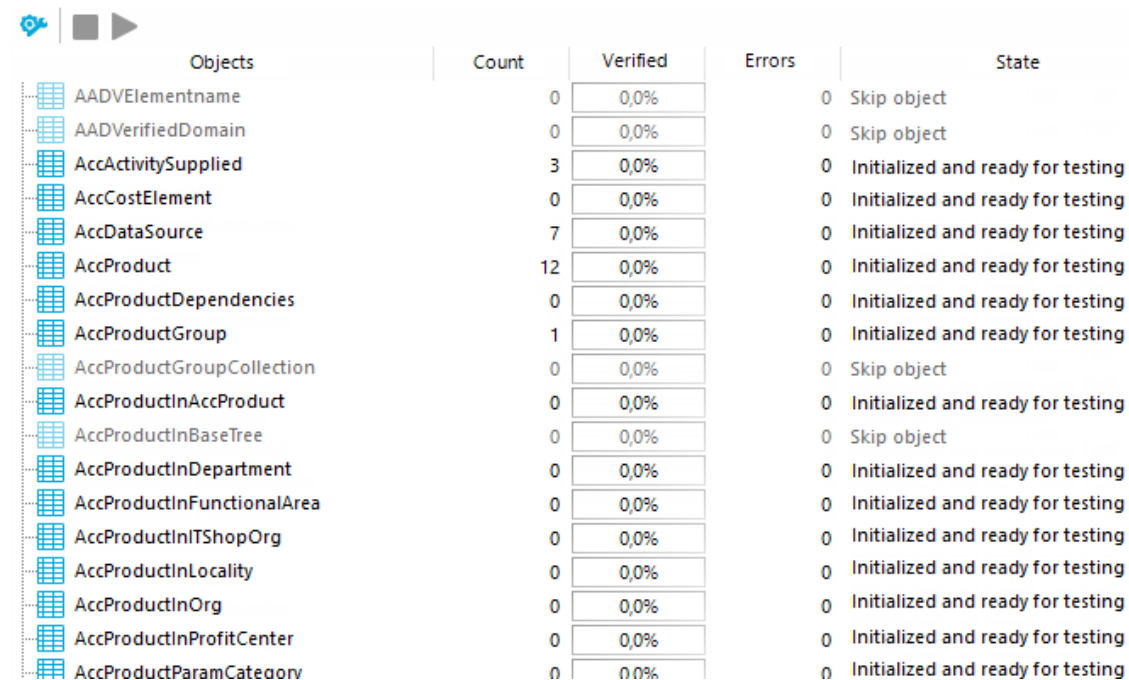
- [Notes on the consistency check](#) on page 84
- [Displaying test objects and the test status](#) on page 86
- [Test settings for consistency checks](#) on page 87
- [Logging test results](#) on page 88
- [Repairing errors](#) on page 89

Displaying test objects and the test status

When Consistency Editor is starting up, One Identity Manager schema table definitions are loaded and database objects are made available for testing. The database tables, the number of objects per table and the test status are displayed in the Consistency Editor's list view.

TIP: To sort by a specific column, click on that column in the table header.

Figure 11: Consistency Editor with Initialized Data




Objects	Count	Verified	Errors	State
AADVElementname	0	0,0%	0	Skip object
AADVerifiedDomain	0	0,0%	0	Skip object
AccActivitySupplied	3	0,0%	0	Initialized and ready for testing
AccCostElement	0	0,0%	0	Initialized and ready for testing
AccDataSource	7	0,0%	0	Initialized and ready for testing
AccProduct	12	0,0%	0	Initialized and ready for testing
AccProductDependencies	0	0,0%	0	Initialized and ready for testing
AccProductGroup	1	0,0%	0	Initialized and ready for testing
AccProductGroupCollection	0	0,0%	0	Skip object
AccProductInAccProduct	0	0,0%	0	Initialized and ready for testing
AccProductInBaseTree	0	0,0%	0	Skip object
AccProductInDepartment	0	0,0%	0	Initialized and ready for testing
AccProductInFunctionalArea	0	0,0%	0	Initialized and ready for testing
AccProductInITShopOrg	0	0,0%	0	Initialized and ready for testing
AccProductInLocality	0	0,0%	0	Initialized and ready for testing
AccProductInOrg	0	0,0%	0	Initialized and ready for testing
AccProductInProfitCenter	0	0,0%	0	Initialized and ready for testing
AccProductParamCategory	0	0,0%	0	Initialized and ready for testing

Table 33: List view information

Column	Meaning
Object	Test object name.
Count	Total number of objects in the database table.
Verified	Test progress in percent.
Errors	The number of error that occurred during a consistency check.
Status	Current test status. The status is updated during the consistency check.

Table 34: Meaning of list view icons

Icon	Meaning
	Test object is currently being test.



Icon	Meaning
	Consistency check was successful for this Test object.
	Consistency check for this test object is complete but errors occurred.


Table 35: List view context menu items

Context menu item	Meaning
Enable	Enables selected test object(s) for the period of the consistency check.
Disable	Disables selected test object(s) for the period of the consistency check.
Test	Starts execution of the consistency check for the selected test object(s).
Skip	Skip the test object during the consistency check.

Test settings for consistency checks





Define the valid test settings before you run a consistency check. Tests are performed at database, table, and object level. There are already predefined tests available. You can run your own custom tests.

To configure the settings for testing

1. Start Consistency Editor in the Designer or in the Manager by selecting **Database | Check data consistency**.
2. In the Consistency Editor toolbar, click .
3. Enable the test that is to be run and adjust the test settings further if necessary.
4. Click **OK**.

The tests are grouped according to different criteria.

Table 36: Meanings of the icons used for test settings

Icon	Meaning
	Tests are grouped by themes.
	Tests are grouped by types (database, tables , objects).
	Tests are displayed as a list.
	Tests are grouped by module association.

Icon	Meaning
	Tests with Error severity are displayed.
	Tests with Warning severity are displayed.
	Tests with Information severity are displayed.

Use user-defined tests to run your own tests. You can use the scripts from the script library for these tests. All scripts in the script library are provided for custom tests. The method call of these scripts corresponds to the following syntax.

Database test

```
Public Sub Methodname (ByRef con As IConnection)
```

```
Public Sub Methodname (ByVal con As IConnection)
```

Table test

```
Public Sub Methodname (ByRef dbTable As ITableDef)
```

```
Public Sub Methodname (ByVal dbTable As ITableDef)
```

Object test

```
Public Sub Methodname (ByRef dbObject As ISingleDBObject)
```





```
Public Sub Methodname (ByVal dbObject As ISingleDBObject)
```



For detailed information about scripts and the script library, see the *One Identity Manager Configuration Guide*.

Logging test results

During the consistency check, the number of tested objects and the test status is updated in the editor's list view. Once the test has completed, any error messages are outputted to the Consistency Editor error log.

Table 37: Meaning of icons in the error log

Icon	Meaning
	Shows all error messages.
	Only shows errors in the selected objects list view.
	A full description of the error is shown in a separate window.
	Fixes the error.

Icon	Meaning
	Saves the error messages in a log file.
	Deletes the error messages.

TIP: For a detailed description of an error, double-click the error message.

Related topics

- [Repairing errors](#) on page 89

Repairing errors

If automatic error correction is possible, the Consistency Editor error log offers a **Repair** button.

To correct faulty data

1. Select the error entry in the Consistency Editor error log.
TIP: Use **Shift + select** or **Ctrl + select** to select several entries for repair.
2. To start error correction, click **Repair**.

The correction is made directly in the One Identity Manager database. Resulting data changes are made using the One Identity Manager Service.

NOTE: When repairing templates, dependent objects can also be changed. In certain cases, a large number of dependent objects are changed and saved. Additional processes may be generated.

Related topics

- [Notes on the consistency check](#) on page 84

Compiling a One Identity Manager database

After changes have been made to configuration data, such as changes to processes, scripts, templates, object definitions, task definitions or preprocessor-relevant configuration parameters, you must compile the database with the Database Compiler.

After a schema installation, a schema update or the import of a complete custom configuration package, the compilation from the Configuration Wizard or the Database Transporter is started immediately. After importing hotfix packages or restricted custom configuration packages, compile the database using the Database Compiler.

NOTE: The  icon in the status bar indicates that the database needs to be compiled.

Detailed information about this topic

- [Compiling a database with the Database Compiler](#) on page 90
- [Output of errors and warnings during compilation](#) on page 92

Compiling a database with the Database Compiler

Before you begin the compilation, all the DBQueue Processor tasks have to be processed. If there are still outstanding tasks on the database, you are notified by the Database Compiler.

To ensure that HTML applications are successfully compiled, you must download packages from the NPM repository. Ensure that the workstation you are compiling on, can establish a connection to the registry.npmjs.org:443 website.



Alternatively, you can download packages from a proxy server and install them manually.



To compile a database

1. In the Designer, select the **Database | Compile database** menu item.
2. On the Database Compiler home page, click **Next**.

3. On the **Compilation settings** page, you can specify which parts of the database are to be recompiled.

Table 38: Compilation settings

Setting	Description								
Web services	One Identity Manager offers the option of linking in data that comes from different web service interfaces. The web service proxy code is stored in the database. The Database Compiler compiles the proxy code for all web services of a DLL and saves it in the database. When changes are made to proxy code the database needs to be compiled.								
Type-safe database model	<p>Type-safe classes are created from table and column definition that you can use in scripts. As a result, a check whether the correct classes are used is performed when the scripts are written and compiled.</p> <p>TIP: After a schema extension, use this option to compile the database.</p>								
Scripts in the Script Library	<p>To compile scripts from the script library, select the following items:</p> <p>Table 39: Selection for script compilation</p> <table> <tr> <th>Selection</th><th>Description</th></tr> <tr> <td>Do not compile scripts</td><td>The scripts in the script library are not compiled.</td></tr> <tr> <td>Scripts without dependencies</td><td>This variant results in script changes only becoming effective when the One Identity Manager tools are restarted.</td></tr> <tr> <td>Scripts incl. all dependencies</td><td>The scripts and all dependencies, such as templates, tasks, and processes, are recompiled. This guarantees that the script changes are loaded and become effective immediately. One Identity Manager tools do not need to be restarted.</td></tr> </table>	Selection	Description	Do not compile scripts	The scripts in the script library are not compiled.	Scripts without dependencies	This variant results in script changes only becoming effective when the One Identity Manager tools are restarted.	Scripts incl. all dependencies	The scripts and all dependencies, such as templates, tasks, and processes, are recompiled. This guarantees that the script changes are loaded and become effective immediately. One Identity Manager tools do not need to be restarted.
Selection	Description								
Do not compile scripts	The scripts in the script library are not compiled.								
Scripts without dependencies	This variant results in script changes only becoming effective when the One Identity Manager tools are restarted.								
Scripts incl. all dependencies	The scripts and all dependencies, such as templates, tasks, and processes, are recompiled. This guarantees that the script changes are loaded and become effective immediately. One Identity Manager tools do not need to be restarted.								
Templates, tasks, etc.	Specifies whether code snippets, such as templates, formatting scripts or task definitions, are compiled. To limit which code snippets are to be compiled, use  to show other selection options.								
Processes	Specify whether processes are compiled. To limit which processes are to be compiled, use  to show selection options.								

Setting	Description
Table 40: Selection for compiling processes	
Selection	Description
All processes	All processes are compiled.
Changed processes	All processes that have been modified since the last compilation are compiled.
Selected processes	Select single objects whose processes are to be compiled.
To select single objects <ol style="list-style-type: none"> Click the [...] button. Choose between compiling modified processes, all processes or selected custom processes. You can limit the preselection more. Click OK. 	
Compiling the web projects	Specify whether web projects are compiled. To limit which web projects are to be compiled, use  to show other selection options.
Compiling the API projects	Specifies whether API projects are compiled.
Compile HTML applications	Specifies whether HTML applications are compiled. To limit which HTML applications are compiled, use  to show other selection options.
Extract language-dependent texts	Texts from scripts are extracted for translation into other languages. The templates are generated for the translation.

- To start compiling, click **Next**.
- The compiling progress is displayed on the **Compiling** page. Compiling may take some time. After you close compiling, click **Next**.
- To end the program, click **Finish** on the last page.

Output of errors and warnings during compilation

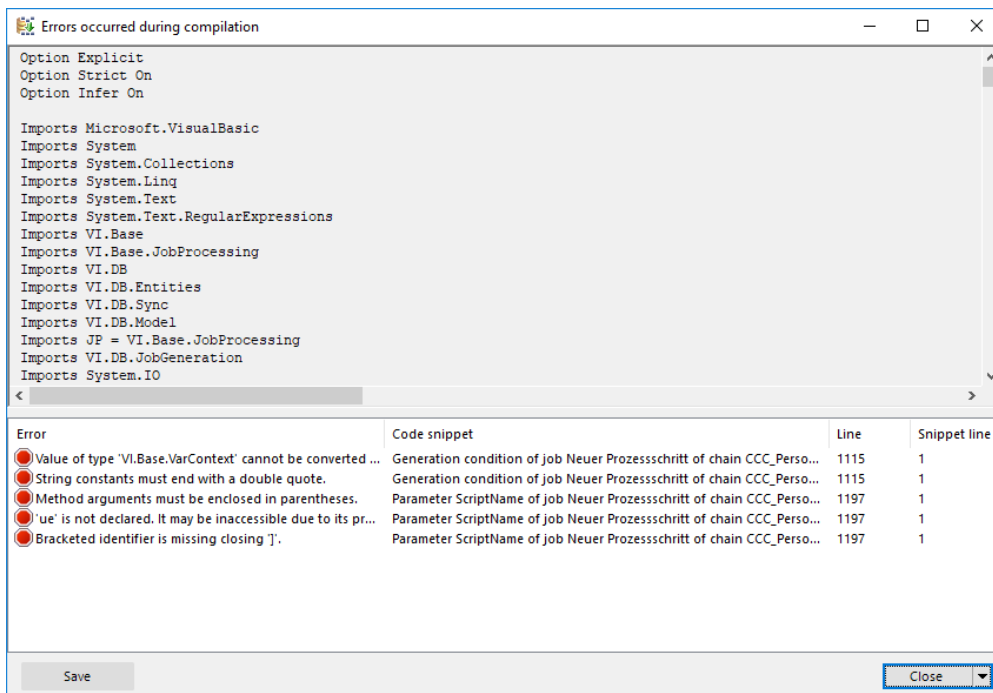
If compiler errors or warnings occur:

1. Correct the error after compilation is finished.
2. Recompile the database.

Errors are displayed in a separate log window during the compilation process in the Database Compiler.

- Double-click an error message in the lower part of the log window to jump to the relevant line in the source code view in the upper part of the log window. You can only view the source code you cannot edit it.
- Select **Save** to save the error messages to a file.
- Select **Close** to close the error log. Then the compilation continues.

Figure 12: Error message log



All compiler errors and warnings are recorded during compilation. You can view compiler errors and warnings after compilation is complete.

To display and save messages

- Select the **Show** button to display a message in the error message window. For detailed information about the error message window, see the *One Identity Manager Process Monitoring and Troubleshooting Guide*.
- To save all messages to a file, select an entry and then select **Save log to file** from the context menu.
- To add a message to the clipboard, select the entry and press **Ctrl + C**.

Transporting custom changes

Automatic version control is integrated into One Identity Manager, ensuring that One Identity Manager components are always consistent with each other and with the database. If program extensions that change the structure are implemented - for example, table extensions - the database needs to be updated.

You need to update the database if hotfixes and service packs are available for the version of One Identity Manager you are currently running or for complete version updates. In addition, customer-specific changes must be transferred from a development database into the test database and into the production system database.

Detailed information about this topic

- [Types of transport packages](#) on page 94
- [Basics for transporting modifications](#) on page 95
- [General notes about transporting changes](#) on page 97
- [Creating a transport package with the Database Transporter](#) on page 99
- [Importing a transport package with the Database Transporter](#) on page 108
- [Displaying contents of a transport package](#) on page 109

Types of transport packages

You can customize the One Identity Manager schema by loading so-called transport packages. One Identity Manager recognizes the following types of transport packages that can be copied to the database depending on requirements.

Table 41: Transport package

Transport package type	Description	Tool used
Migration	Migration packages are provided by for the initial database	Configuration

Transport package type	Description	Tool used
package	schema installation, for service pack and complete version updates. A migration package contains all the necessary tables, data types, database procedures, and the default One Identity Manager configuration.	Wizard
Hotfix package	Hotfix packages are provided to load individual corrections to the default configuration such as templates, scripts, processes, or files into the database. NOTE: If a hotfix package only contains changed files, load these files into the database using the Software Loader file.	Database Transporter Software Loader
Custom configuration package	A custom configuration package is used to exchange customer specific changes between the development, test, and productive system database. This transport package is created by the customer and loaded into the database.	Database Transporter

NOTE: If, in addition to a hotfix package, there are additional customized configuration settings to be installed in a One Identity Manager database, create a custom configuration package and use the Database Transporter to import it into the target database. There is no support for merging a hotfix package with a custom configuration package into one transport package.

Related topics

- [Basics for transporting modifications](#) on page 95
- [Creating a transport package with the Database Transporter](#) on page 99
- [Importing a transport package with the Database Transporter](#) on page 108

Basics for transporting modifications

Different methods are implemented for transporting modifications.

- Transport of single objects is done through the object layer.
When you import a transport package, the permissions, templates, and customizer in the target database are taken into account.
This method is used, for example, if you use the Database Transporter program to create and import custom configuration packages that contain modifications to a system user, modifications starting from a defined date or to individual objects.
- The transport of the entire system configuration is done through a transfer buffer.

All relevant tables are checked when creating the transport package. The condition applied to the table, defines which objects are transported. The primary key is used to establish whether the transport entry has a GUID module and whether it is transferred to the source database transfer buffer. The transfer buffer is read and transport package is created. When importing into the target database, the contents of the transport package is transferred to the target database's transfer buffer. The information is then transferred to the target tables.

This method is used if you use the Database Transporter program to create and import custom configuration packages that contain the complete system configuration. This method is also used to install and update the One Identity Manager schema using the Configuration Wizard.

When a transport package is imported into a One Identity Manager database, the following operations are carried out:

- Inserting objects

No object was found in the destination database using the primary key or alternative key, therefore a new object is created with this key value.

- Updating objects

An object found in the target database using the primary key will be updated. The update is done using the configuration buffer.

If transporting modifies a default configuration, the default configuration is moved into the configuration buffer. You can retrieve changes from the configuration buffer and restore the default configuration in this way.

If, during a One Identity Manager version upgrade, the default configuration is changed by a service pack, a complete version upgrade or by loading a hotfix package, a check is made to see if it has already been customized. In this case, the modified default configuration is copied to the configuration buffer. This ensures that customizations do not go missing.

- Deleting objects

Objects that are no longer needed are deleted. This operation is always executed if the entire system configuration is transported.

Related topics

- [General notes about transporting changes](#) on page 97
- [Creating a transport package with the Database Transporter](#) on page 99
- [Importing a transport package with the Database Transporter](#) on page 108

General notes about transporting changes

To exchange customizations between the development database, test database and the productive database, use the Database Transporter to create transport packages. You also use the Database Transporter to import the transport packages into the target database.

Notes about creating transport packages

- To copy individual objects into a transport package, specify the export criteria in Database Transporter. For example, you can export all changes made by a system user, changes made starting from a defined date or change labels. We recommend that you limit the custom configuration package if you are transporting individual changes.
- You should only create a transport for the full system configuration if you want to copy all the adjustments to the system configuration from a test database into an initial productive database.
- To import transport packages with the Database Transporter, the user needs the program function **Allows transport packages to be imported into the database** (Transport_Import).
- The export date, the export description, database revision and the name of the export file in the source database transport history are recorded when a transport package is created with the Database Transporter.

Notes about importing transport packages

- Test the changes in a test environment before you load a transport package in a production system.
- You can display the contents of a transport package with the Database Transporter before you import.
- Before importing a transport package, you can protect individual properties from being overwritten in the target database.
- To import transport packages with Database Transporter, the user requires the **Allows transport packages to be imported into the database** (Transport_Import) program function.
- Start Database Transporter on an administrative workstation.
- Depending on the type of transport, the database is set to single-user mode for the duration of the import. Close all existing connections to the database before starting the import.
- When you import a transport package with schema extensions, the database is set to maintenance mode. Objects cannot be processed in the database during this time.

- When importing a transport of the system configuration into a target database, you must also follow the [Notes about importing the system configuration](#) on page 107.
- When you import a transport package with the Database Transporter, the import date and description, the database version, and the transport package name are recorded in the transport history of the target database.

Related topics

- [Protecting individual properties from being overwritten](#) on page 98
- [Displaying transport history](#) on page 98
- [Creating a transport package with the Database Transporter](#) on page 99
- [Importing a transport package with the Database Transporter](#) on page 108
- [Displaying contents of a transport package](#) on page 109

Protecting individual properties from being overwritten

Before importing a transport package, you can protect individual properties from being overwritten in the target database.

For example, you may want to block processing, as follows:

- Configuration parameters and their values should not be overwritten when a test environment is transported to a productive system.
- Server configurations should neither be overwritten in the test environment nor the productive system during a transport.

To unlock and unlock a single property

1. Open the object in the Designer or the Manager.
2. Click the property name and select one of the following options from the context menu:
 - **Prohibit modification:** The property is locked for editing. The input field is locked and grayed-out.
 - **Permit modification:** The property is unlocked and available for editing.

Displaying transport history

The export date, the export description, database revision and the name of the export file in the source database transport history are recorded when a transport package is created with the Database Transporter.

When you import a transport package with the Database Transporter, the import date and description, the database version, and the transport package name are recorded in the transport history of the target database.

To display transport history

- Start the Designer and select the **Help | Transport history** menu item.

Creating a transport package with the Database Transporter

To create a transport package

1. Start the Launchpad and log in to the One Identity Manager database.
2. In the **Change & Extend** view, select the **Transport custom modifications** entry. This starts the Database Transporter program.
3. Select **Create a transport file** on the start page.
4. On the **Select the database connection** page, check the One Identity Manager database connection data and change it if necessary.
5. Enter the information about the transport file on the **Define file name** page.
 - a. Enter the name of the transport file and change the output directory as required.
 - b. To create a log file for the export, enable the **Create a log file for data export** option.
The log file is saved in the output directory of the transport file.
6. Enter a description of the transport data on the **Show and define transport parameters** page.
7. Select the export criteria on the **Define transport data** page.

| **NOTE:** You can combine multiple export criteria.

Table 42: Export criteria

Export criterion	Description
Run SQL statements before the data import	You can integrate SQL statements in the custom configuration package, which are to be run before a data import. For more information, see Integrating SQL statements in a transport package on page 101.
Transport of favorite objects	In an initial selection, all modified processes, scripts, reports, and mail templates for a specific timeframe are

Export criterion	Description
	<p>offered.</p> <p>For more information, see Exporting favorite objects on page 101.</p>
Transport by change label	<p>Transport the changes to objects or object attributes that are summarized in a change label.</p> <p>For more information, see Exporting change labels on page 102.</p>
Transport by change information	<p>Limit the transportation data by user, timeframe, and database tables.</p> <p>For more information, see Exporting changes based on change information on page 103.</p>
Transporting schema extensions	<p>Transport custom schema extensions, such as tables, columns, database procedures, features, triggers, views, and indexes.</p> <p>For more information, see Transporting schema extensions on page 104.</p>
Transporting selected objects and their dependencies	<p>Select single objects and their dependencies for transport.</p> <p>For more information, see Exporting selected objects and dependencies on page 105.</p>
Transporting system configuration	<p>Transport the entire system configuration.</p> <p>For more information, see Transporting the system configuration on page 106 and Notes about importing the system configuration on page 107.</p>
Transporting system files	<p>Transport single files.</p> <p>For more information, see Exporting system files on page 106.</p>
Transport of synchronization projects	<p>Select the synchronization project for transporting.</p> <p>For more detailed information, see the <i>One Identity Manager Target System Synchronization Reference Guide</i>.</p>
Run SQL statements after the data import	<p>You can integrate SQL statements in the custom configuration package, which are to be run after a data import.</p> <p>For more information, see Integrating SQL statements in a transport package on page 101.</p>

8. To start the export, click **Next**.

The program determines the data to export and displays the progress of the export in the dialog box. The export procedure can take some time.

9. To end the program, click **Finish** on the last page.

Related topics



- [General notes about transporting changes](#) on page 97
- [Importing a transport package with the Database Transporter](#) on page 108

Integrating SQL statements in a transport package

You can integrate SQL statements in the custom configuration package. The SQL statements are run before or after a data import. For example, after a schema extension has been transported a SQL statement may be required for filling initial data in the new columns.

NOTE: To create transport packages with SQL statements, the user needs the **Enables integration of SQL statements in a transport file** (Transport_SQL) program function.

To run SQL statements within a transport package

1. In the Database Transporter, on the **Define transport data** page, select the export criteria for executing SQL expressions. The following export criteria are available:
 - Run SQL statements before data import
 - Run SQL statements after the data import
2. Create the SQL statement using the **Edit** button. Differentiate between SQL statements for system data transport and user data transport.
 - a. Enter the SQL statements directly.
 - OR -
 - Using the  interface, load a .sql file containing the statements.
 - b. Use the  button to save to a file.

Related topics

- [General notes about transporting changes](#) on page 97
- [Creating a transport package with the Database Transporter](#) on page 99

Exporting favorite objects

Use this transport method to select the modified processes, scripts, reports, and mail templates from a specific timeframe.

To transport favorite objects

1. In the Database Transporter, on the **Define transport data** page, select the **Transport of favorite objects** export criteria.
2. Click **Select** to select the single objects for the transport.
 - a. In the **Object modified in last ... days** input field, enter the timeframe for the object selection.

All objects with a change date and user in the selected timeframe are displayed.

TIP: To include other processes, scripts, reports, or mail templates in the transport package, use the **Load all** entry.

- b. Select the object you want and use ➔ to add it to the transport package.

TIP: Use **Shift + select** or **Ctrl + select** to select multiple objects in the selection dialog.

The **Transport objects** pane lists all selected objects and their dependencies.

Related topics

- [General notes about transporting changes](#) on page 97
- [Creating a transport package with the Database Transporter](#) on page 99

Exporting change labels

Several changes to objects or objects properties are grouped together under a change label and can be swapped between source database and target database in this way. When a custom configuration package is imported with change labels, new data records are added to the target database and existing data records are updated. In addition, objects marked for deletion in the change label are deleted from the target database.

NOTE: There are no change labels available after initial schema installation.

To transport by change label

1. In the Database Transporter, on the **Define transport data** page, select the **Transport by change information** export criteria.
2. Select the change label from the menu.
3. (Optional) To display the contents of a change label, click **Display**.

Objects and changes are displayed, which belong to the change label.

NOTE: If a change label still contains references to objects that no longer exist in the database, remove the assignment using the **Repair** button.

4. (Optional) For additional settings for change label transport, click **Options** and specify the following options.

Table 43: Additional transport settings

Setting	Description
Close change label after export	The change label is closed after the transport. No more changes can be booked to this change label.
Copy dependent objects to the transport package	Objects that are dependent on the selected object and do not have a change label are also copied to the transport.
Also display closed change labels	Change labels that are already closed are also offered for selection.

Related topics

- [General notes about transporting changes](#) on page 97
- [Creating a transport package with the Database Transporter](#) on page 99
- [Working with change labels](#) on page 78

Exporting changes based on change information

Use transport by change information to limit transportation data by user, time period and database tables.

To transport by change information

1. In the Database Transporter, on the **Define transport data** page, select the **Transport by change information** export criteria.
2. Specify which changes you want to transport.

Table 44: User list

Entry	Description
me	Only the changes by the logged-in user are added.
all users	Changes are added from all users.
selected users	Changes are added from selected users.

TIP: The **User** area displays the system users. The ... button beside the input field allows you to select other users. Use **Shift + select** or **Ctrl + select** to select multiple users in the selection dialog.

3. Use the date filter to export changes for the selected user(s) from a specified date. The entries **today**, **yesterday**, **day before yesterday**, **this week** and **last database migration** and **time period** are available.
4. You can limit transportation data even further by selecting database tables.

Table 45: Table selection

Entry	Description
Entire system	Changes are added from all tables.
System data	Changes are added from the tables of the system data part.
User data	Changes are added from the tables of the user data part.
Selected tables	Changes are added from specific tables.

TIP: To display objects that match the specified export criteria, click **Display**. In this overview, you can exclude individual objects from the transport To do this, disable the corresponding objects.

Related topics

- [General notes about transporting changes](#) on page 97
- [Creating a transport package with the Database Transporter](#) on page 99

Transporting schema extensions

Custom schema extensions, like tables, columns, database procedures, functions, triggers, views, and indexes that you want to add, must distinguished by a custom prefix **CCC_**. Furthermore, only custom database procedures, functions, triggers, views, and indexes that are not encoded and are smaller than 64 kb are included.

Custom database procedures, functions, triggers, and views are always exported in their entirety. Entries corresponding to custom tables and columns are generated in the One Identity Manager schema when the transport package is imported (tables DialogTable, DialogColumn, QBMRelation).

To transport all schema extensions completely from a test database to a productive database, the following procedure is recommended:

1. Create a transport of schema extensions in the test database and import these into the production database.
2. Create a transport of the system configuration in the test database and import these into the production database.

Use the transport options to transport single customizations by change label, change information or selected objects.

To transport schema extensions

- In the Database Transporter, on the **Define transport data** page, select the **Transport of schema extensions** export criteria.

NOTE: Use **Show** to display the schema extensions.

Related topics



- [General notes about transporting changes](#) on page 97
- [Creating a transport package with the Database Transporter](#) on page 99

Exporting selected objects and dependencies

Use this transport method to select single objects and their dependencies for the transport. You can add objects dependent on the object you want to transport without having to select them individually.


NOTE: The selection for this transport criterion displays all tables not labeled with the **No DB Transport** option. If objects of other tables are to be transportable, then disable the option for the tables in the Designer. For more information about customizing table definitions, see the *One Identity Manager Configuration Guide*.

To transport single objects and their dependencies

1. In the Database Transporter, on the **Define transport data** page, select the **Transport of selected objects and dependencies** export criteria.
2. Click the **Select** button to select the single objects for the transport.
 - a. In the **Tables** pane, select the database table from which you want to copy objects to the custom configuration package.
 - b. The **Relations** pane displays the ChildRelation (CR), ForeignKey (FK) and many-to-many relations for the selected database table. Enable the required relations to copy the connected objects to the transport.
 - c. The **Objects** pane displays all the objects of the selected table. Select the objects you want and add them to the transport.
 - To delete superfluous objects when the transport package is imported, select .
 - If you do not want to perform post-processing when the transport package is imported, select .

TIP:

- Use **Shift + select** or **Ctrl + select** to select multiple objects in the selection dialog.

- You can use  to create a filter to limit the selection.
- d. The **Objects to transport** pane lists all selected objects and their dependencies.
- TIP:** To remove individual object from the transport, select **Remove**.

Related topics

- [General notes about transporting changes](#) on page 97
- [Creating a transport package with the Database Transporter](#) on page 99

Exporting system files

Use this transport method to transport individual files by exporting them from the database.

To transport new or modified One Identity Manager files

1. In the Database Transporter, on the **Define transport data** page, select the **Transport system files** export criteria.
2. Click **Select** and specify the files to transport.

Related topics

- [General notes about transporting changes](#) on page 97
- [Creating a transport package with the Database Transporter](#) on page 99

Transporting the system configuration

You should only use a transport of the system configuration if you want to copy all the adjustments to a test database into an initial productive database.

To transport custom database procedures, features, triggers, or views completely from a test database to a productive database in addition to the system configuration:

1. Create a transport of schema extensions in the test database and import these into the production database.
2. Create a transport of the system configuration in the test database and import these into the production database.

To transport individual configuration data units to an existing productive database, use transports based on change labels, change information or selected objects.

Importing a transport of the system configuration overwrites the configuration data of the target database. This also applies to the configuration parameter settings. Before importing a transport package, you can protect individual properties from being

overwritten. After importing the system configuration into a target database, you should check and, if necessary, modify the configuration settings.

Detailed information about this topic

- [General notes about transporting changes](#) on page 97
- [Exporting the system configuration](#) on page 107
- [Notes about importing the system configuration](#) on page 107
- [Transporting schema extensions](#) on page 104

Exporting the system configuration

You should only use a transport of the system configuration if you want to copy all the adjustments to a test database into an initial productive database.

To create a transport for the system configuration

- In the Database Transporter, on the **Define transport data** page, select the **Transport by change information** export criteria.

Related topics

- [General notes about transporting changes](#) on page 97
- [Creating a transport package with the Database Transporter](#) on page 99
- [Transporting the system configuration](#) on page 106
- [Notes about importing the system configuration](#) on page 107

Notes about importing the system configuration

When importing a transport of the system configuration into a target database, you must follow the instructions described under [General notes about transporting changes](#) on page 97 and consider the following special features:

- Before performing the import, protect individual properties of the target database from being overwritten.
- If you need custom schema extensions, such as database procedures, features, triggers, or views in the target database in addition to the system configuration, you should import these schema extensions before importing the system configuration.
- After importing the system configuration, check the configuration settings in the target database.

- Check the staging level of the target database.
- Check at least the configuration settings for the DBQueue Processor. The settings are specified through the database staging level and configuration parameters.

You can find detailed information about configuring a One Identity Manager database for test, development, or productive environments in the *One Identity Manager Installation Guide*.

- After importing the system configuration, release the locked properties for editing again.

Related topics

- [Exporting the system configuration](#) on page 107
- [Protecting individual properties from being overwritten](#) on page 98
- [Importing a transport package with the Database Transporter](#) on page 108

Importing a transport package with the Database Transporter

IMPORTANT: Test changes in a test system before you load a transport package in a productive system.

To import a transport package

1. Start the Launchpad and log in to the One Identity Manager database.
2. In the **Change & Extend** view, select the **Transport custom modifications** entry. This starts the Database Transporter program.
3. Select **Import transport file** on the start page.
4. On the **Select the database connection** page, check the One Identity Manager database connection data and change it if necessary.
5. Select the transport package file browser and click **Open**.
6. Specify your import options on **Select transport file**.

Table 46: Import options

Setting	Description
Create a log file for the data import	Enable this option to create a log file for the import. The log file is saved in the output directory of the transport file.

Setting	Description
Import objects singly and ignore errors	Enable this option to import options individually. Errors, which might occur during importing are ignored and displayed when importing is complete. If you do not enable this option, the import procedure is canceled when errors occur.
Ignore default data differences	Enable this option to ignore changes to default data during the import. If you do not enable this option, the import procedure is canceled if changes to default data are included.

- Import steps and import progress are displayed on the **Importing transport data** page. The import procedure can take some time. Calculation tasks are queued for the DBQueue Processor on termination.

NOTE: During import, if the expected value does not match with the actual value in the database, the **Merge conflict** dialog opens. For each conflict, you must decide which value is committed to the database.

- If you want to keep database value, enable **Current database value**.
- If you want the value from the transport package to overwrite the database value, enable **Transport value**.

- If changes have been made to the system configuration, for example, processes, or scripts imported, you have to compile the database after the tasks have been processed. Compilation is started automatically once importing is complete.
- To end the program, click **Finish** on the last page.

NOTE: Use the  button to save any errors that occur whilst importing.

Related topics

- [General notes about transporting changes](#) on page 97
- [Notes about importing the system configuration](#) on page 107
- [Displaying contents of a transport package](#) on page 109

Displaying contents of a transport package

To display the contents of a transport package

- Start the Launchpad and log in to the One Identity Manager database.
- In the **Change & Extend** view, select the **Transport custom modifications** entry. This starts the Database Transporter program.

3. Select **Show transport file**.
4. Select the transport package file browser and click **Open**.
5. Click **Next** on the **Select transport file** page.
6. The contents of the transport file are displayed on the **Show transport file** page.
 - To display the sequence in which the objects are imported:
 - a. Click **+** to select an entry in the transport file and select **Sort in import order** from the context menu.
 - b. Click **OK** and enter the connection credentials for the database. This step is only required when you established the first in the order.

The order in which the entry's objects are imported into the database is found.
 - c. Repeat this step for all other entries for which you want to determine the import order.
 - To display the objects required for an import in the target environment, select the entry for the .xml file and select **Show required objects** from the context menu.

Objects that are dependent on another object that is not part of the transport package are highlighted.
7. To end the program, click **Finish** on the last page.

TIP: You can start the import of the transport package from display mode. On the **Show transport file** page, click the name of the transport package and use the **Import** context menu.

Related topics

- [Importing a transport package with the Database Transporter](#) on page 108

Importing data with Data Import

With the Data Import program, the One Identity Manager offers a simple means of importing data from other systems. The program supports importing from .csv files and importing directly from other database systems. You can import data immediately. You also have the option to import data from customized processes using the import scripts that are created. The import definition is saved so that you can use it for future data imports.

The steps in the program are as follows:

1. Load export definitions
2. Select the import method
3. Configure the import
4. Create an import definition
5. Create an import script
6. Start the import

NOTE:

- For regular data imports into One Identity Manager, you can also use the ScriptComponent process component.
- The DataImporterCMD.exe program provides support for imports from the command line.

Detailed information about this topic

- [Importing data from a CSV file](#) on page 112
- [Importing data from an external database](#) on page 117
- [Configuring an import](#) on page 120
- [Using an import definition file](#) on page 126
- [Importing the data](#) on page 125
- [DataImporterCMD.exe](#) on page 148

Importing data from a CSV file

Prerequisites

The data structure of the import file needs to fulfill the following requirements:

- The data is separated by a delimiter or fixed column widths are used.
- The data records are separated by a new line.
- Data that contains a new line is marked with a text qualifier.
- For more extensive CSV imports, the data in the import file is sorted in advance to resolve the object dependencies.

NOTE: For imports with small amounts of data, use the sorting options of the Data Import.

To import data from CSV files into the One Identity Manager database

1. Start the Launchpad and log in to the One Identity Manager database.
2. On the **Configuration** page, select the **Configure a data import** option. This starts the Data Import program.
3. On the Data Import start page, click **Next**.
4. On the **Select the database connection** page, check the One Identity Manager database connection data and change it if necessary.
5. (optional) On the **Loading an import definition file** page, load the import definition file, if available.
NOTE: Leave this field empty if you want to create a new import definition.
6. On the **Select data source** page, select the **Import CSV file** method.
7. On the **Load import file** page, load the import file and enter additional data about the import file.
8. On the **File structure** page, specify how the file is structured.
9. On the **Defining the line structure** page, specify the structure of the lines.
10. (Optional) On the **Line condition** page, specify a condition for importing lines.
11. Configure the import.
 - a. On the **Match target tables and columns** page, assign the data for target tables and target columns of the One Identity Manager database and specify the key columns.
 - b. On the **Specify hierarchy** page, specify the data hierarchy for the import.
 - c. On the **Handling options for data sets** page, specify options for handling the data.
 - d. On the **Connection variables** page, define variables that are set on import.

12. On the **Saving the import definition** page, save the import definition file and the import script.
13. On the **Saving the import definition** page, start the import.
14. On the last page of the Data Import, quit the program or start another import.

Detailed information about this topic

- [Loading the CSV file](#) on page 113
- [Structure of the CSV file](#) on page 113
- [Defining a condition for the import](#) on page 116
- [Assigning the data to target tables and target columns](#) on page 120
- [Specifying the data hierarchy](#) on page 122
- [Options for handling records](#) on page 123
- [Specifying connection variables](#) on page 124
- [Importing the data](#) on page 125
- [Using an import definition file](#) on page 126

Loading the CSV file

On the **Load import file** page in Data Import, enter the following data about the import file.

Table 47: Import file settings

Property	Description
Import file	Path to the .csv file containing the data to be imported. You can use the ... button beside the input field to navigate to and open the file.
File encoding	Encoding of the .csv file. Encoding of the character set is determined from the character set on your workstation when the import file is loaded. Change the setting if the file was created with another character set.
File culture	Language used to create the file. The language is required in order to read local character formats correctly, for example, dates.
Time zones	If date and time information is imported, select the time zone of the data. The time zone is required for converting the data to UTC.

Structure of the CSV file

On the **File structure** page in the Data Import, specify how the file is structured.

Table 48: File structure

Property	Description
Number of lines in header	Enter the number of head lines in the .csv file. The header is not imported.
Columns identified by	<p>Indicator for column limits.</p> <ul style="list-style-type: none">• Select the Delimiter option if the data is separated by a semi-colon, comma, space, tab, pipe, or other character. Specify the line structure.• Select the Fixed width option if all the data in the columns has the same length. Specify the line structure.

Detailed information about this topic

- [Specifying the line structure for data with delimiters](#) on page 114
- [Specifying the line structure for data with a fixed width](#) on page 116

Specifying the line structure for data with delimiters

In Data Import on the **Defining the line structure** page, describe how the line structure is configured. If you have selected the **Columns identified by delimiters** option for the file structure, specify the following settings.

NOTE: The **Line break preview** pane displays the line structure according to the selected settings.

Table 49: line structure

Property	Description
Delimiter	<p>Delimiter used to separate the data in the file. You have the following options: Semicolon, Comma, Space, Tab, and Pipe.</p> <p>If the data is separated by a different character, select Other: and enter the delimiter in the input field next to the menu.</p>
Text qualifier	<p>Character enclosing the column text. This text is treated as one value on import, even if the text contains the delimiter given as above.</p> <p>NOTE: The delimiters are masked by doubling them up.</p> <p>Example:</p>

Property	Description
	<p>Delimiter: Comma (,)</p> <p>Text qualifier: Quotation mark (")</p> <p>Value in file: "Smith,Bill"</p> <p>Value after import: Smith,Bill</p>
	<p>Delimiter: Comma (,)</p> <p>Text qualifier: Not given or other character:</p> <p>Value in file: "Smith,Bill"</p> <p>1st value after import: "Smith</p> <p>2nd value after import: Bill"</p>
Mask delimiter by doubling	<p>Specifies whether the data is separated by several of the same delimiters. Data that contains a new line must be marked with a text qualifier.</p> <p>Example:</p> <p>Delimiter: Comma (,)</p> <p>Mask delimiter by doubling: Enabled</p> <p>Value in file: Smith,,Bill</p> <p>Value after import: Smith,Bill</p> <p>Delimiter: Comma (,)</p> <p>Mask delimiter by doubling: Not set</p> <p>Value in file: Smith,,Bill</p> <p>1st value after import: Smith</p> <p>2nd value after import:</p> <p>3rd value after import: Bill</p>
Multiple values in / delimited by	<p>Specifies whether the import contains a multivalued property column (MVP) and the column should not be imported directly. Individual values are entries in another table and should be linked through a many-to-many table.</p> <ul style="list-style-type: none"> Using the menu, specify Multiple values in the column in question. In Delimited by: enter the values' delimiter. <p>The column values are split up. A new line is generated for each value</p>

Property	Description
----------	-------------

although the rest of the columns remain the same.

Example:

The line

```
John;Smith;Org1|Org2|Org3
```

is converted by suitable settings to the import source

```
John;Smith;Org1
```

```
John;Smith;Org2
```

```
John;Smith;Org3
```

Related topics

- [Structure of the CSV file](#) on page 113
- [Specifying the line structure for data with a fixed width](#) on page 116

Specifying the line structure for data with a fixed width

In Data Import on the **Defining the line structure** page, describe how the line structure is configured. If you have selected the **Columns identified by fixed width** option for the file structure, specify the width of the columns.

- Click on the ruler in the Data Import preview to set a separation point. A separation mark is inserted.
- When you click again on a fixed separation point, the separation mark is deleted.

Related topics

- [Structure of the CSV file](#) on page 113
- [Specifying the line structure for data with delimiters](#) on page 114

Defining a condition for the import

To exclude individual data records from the import, you can specify a condition for the lines to be imported on the **Line condition** page in the Data Import.

Format the condition in VB.Net syntax. The columns are accessed with dollar notation. For detailed information about scripts in One Identity Manager, see the *One Identity Manager Configuration Guide*.

Access using column indexing (0...n)

Example:

Do not import the data record if the first column contains the **OLD** value.

Value = \$0\$<>"OLD"

Access using column identifier

If a header is defined, you can use the column identifier for access.

Example:

Import the data record if the column with the name NewData contains the **True** value.

Value = \$NewData:Bool\$

Importing data from an external database

To import data from an external database into the One Identity Manager database

1. Start the Launchpad and log in to the One Identity Manager database.
2. On the **Configuration** page, select **Configure a data import**. This starts the Data Import program.
3. On the Data Import start page, click **Next**.
4. On the **Select the database connection** page, check the One Identity Manager database connection data and change it if necessary.
5. (optional) On the **Loading an import definition file** page, load the import definition file, if available.
| **NOTE:** Leave this field empty if you want to create a new import definition.
6. On the **Select data source** page, select the **Import from database** import method.
7. On the **Select external database** page, specify the connection data to the external database.
8. On the **Select source data** page, formulate the query to determine the data records from the external database.
9. Configure the import.
 - a. On the **Match target tables and columns** page, assign the data for target tables and target columns of the One Identity Manager database and specify the key columns.
 - b. On the **Specify hierarchy** page, specify the data hierarchy for the import.

- c. On the **Handling options for data sets** page, specify options for handling the data.
 - d. On the **Connection variables** page, define variables that are set on import.
10. On the **Saving the import definition** page, save the import definition file and the import script.
11. On the **Saving the import definition** page, start the import.
12. On the last page of the Data Import, quit the program or start another import.

Detailed information about this topic

- [Selecting an external database](#) on page 118
- [Determining the source data](#) on page 119
- [Assigning the data to target tables and target columns](#) on page 120
- [Specifying the data hierarchy](#) on page 122
- [Options for handling records](#) on page 123
- [Specifying connection variables](#) on page 124
- [Importing the data](#) on page 125
- [Using an import definition file](#) on page 126

Selecting an external database


In the Data Import on the **Select external database**, specify the connection information. Refer to the documentation of the database provider implemented, for the connection parameters.

To set up a connection with an external database

1. In the **Connection type** section, select the provider of the external database.
 - A list of the various database providers available is shown.

Supported database providers

Odbc Data Provider
OleDb Data Provider
OracleClient Data Provider
SQLClient Data Provider
dotConnector for Oracle
Microsoft SQL Server Compact Data Provider

- When you use another database provider, select it using the ... button next to the input field.
2. In the **Connection data** section, enter the connection data to the external database.
 - a. Select the ... button and enter the connection data.
 - b. (Optional) To encrypt the connection data, click .
 - c. To check the connection data, click **Test**.
 3. If date and time information is imported, select the time zone of the data in the **Other settings** section. The time zone is required for converting the data to UTC.

Determining the source data

Formulate the query determine the data records from the external database in the Data Import on the **Select source data** page.

To determine the data from the external database

- To select the table and columns from the external database directly, activate the **Select source table and columns** option and enter the following information.

Table 50: Settings for selecting the table and columns

Property	Description
Table	Tables whose content is imported.
Columns	Columns whose content is imported.

Property	Description
	Enter the column relations directly in the input field or use the ... button to open a dialog window to select the columns.
WHERE clause	Condition to further limit the data to be imported.
Order by	The sort order is required if the data records have to be transferred in a defined sequence, for example, as in hierarchical structures. Format the sort order as a valid order by statement for a database query.

- To determine the data records with a SQL query, enable the **SQL statement** option and formulate the database query in SQL syntax.

Configuring an import

Creating an import configuration includes the following steps:

1. Assigning the data to target tables and columns in the One Identity Manager database.
2. Specifying the data hierarchy for the import.
3. Specifying options for handling the data.
4. Defining variables that are set on import.

Detailed information about this topic


- [Assigning the data to target tables and target columns](#) on page 120
- [Specifying the data hierarchy](#) on page 122
- [Options for handling records](#) on page 123
- [Specifying connection variables](#) on page 124

Assigning the data to target tables and target columns

On the **Match target tables and columns** page in Data Import, specify the how the data is stored in the One Identity Manager database.

To assign target table and target columns

1. In the **Target table** section, select the target table into which data is imported.

TIP: Use the  button in the **Target table** section to assign the target columns and key automatically. You should always check this suggestion.


Assigns a column if one is found in the target table whose name matches the name in the source column.

2. In the **Target columns and key** section, specify the mapping of data in the target columns of the table.

NOTE: If a target column is not yet assigned, **Not assigned** is displayed as a column identifier.

Click the arrow button beside a column identifier to open the assignment wizard and record the following information for every column.

Table 51: Properties for target columns and keys

Property	Description
Use as a key column	<p>Specifies whether the column is used as a key column.</p> <p>More than one key columns can be defined. The data records to import into the database are determined based on key columns. Data records should be uniquely identified with these key columns.</p>
Conversion script	<p>Use the conversion script to modify source column values to match the permitted value of the target column. This is required, for example, if a list of permitted values is defined for the target columns.</p> <p>Write the conversion script in VB.Net syntax. You access the values with the variable <code>value</code>. Use dollar notation to access the source columns. For detailed information about scripts in One Identity Manager, see the <i>One Identity Manager Configuration Guide</i>.</p>
Target column	<p>Select the target columns to be imported into the data. All columns from the target table are displayed with their data type. Following applies:</p> <ul style="list-style-type: none">• Compulsory data is labeled with a blue triangle in front of the data type.• Columns without sufficient permissions are displayed in gray.• Columns, deactivated by preprocessor condition, are not shown. <p>TIP:</p> <ul style="list-style-type: none">• Use the  button to suggest a column if a column whose identifier matches the designation of the source column is found in the target table. You should always check this suggestion.• Use the Show column captions option to switch between the display name and technical name of the column.

TIP: In the assignment wizard, you can use the > button to switch to the next column. The **Data preview** pane contains a preview of the values.

Related topics

- [Inserting columns with fixed values](#) on page 122

Inserting columns with fixed values

In Data Import, you can insert additional columns with fixed values in the data import and import into a defined column.

To insert columns with fixed values

1. In the **Target columns and key** section, click the arrow button beside any column name to open the assignment wizard.
2. Click the **+** button.
3. Enter the value you want in **Fixed value**.
 - OR -
 - If the value is to be determined from the values in source columns, enter a conversion script.
4. Assign the target column.
5. Close the system assignment wizard.

Related topics

- [Assigning the data to target tables and target columns](#) on page 120

Specifying the data hierarchy

If an import contains data that includes dependencies, you must ensure that the reference targets are processed before the reference sources.

For example, child departments (Department.UID_Department) are imported after parent departments (Department.UID_ParentDepartment).

NOTE:

- Sorting the data into a hierarchical structure can consume a great deal of memory in the Data Import. Therefore, only use this procedure for imports with small amounts of data.
- For more extensive CSV imports, sort the data in advance in the import file to resolve the object dependencies.

- For extensive imports from external databases, use the Order-by clause to sort the data.

To sort the data in the Data Import hierarchically

1. On the **Specify hierarchy** page, enable the **Sort by hierarchy** option.
2. Select the **Key column** in which the data is mapped, for example, Department.UID_Department.
3. Select the **Parent key column**, for example, Department.UID_ParentDepartment.

Related topics


- [Determining the source data](#) on page 119

Options for handling records

In the Data Import on the **Handling options for data sets** page, specify how new and existing data records are handled when imported. The import must take several cases into account and respond accordingly in each case. During the import, the data records of the source data are compared with the database entries. You can use a condition to further limit the relevant database entries.

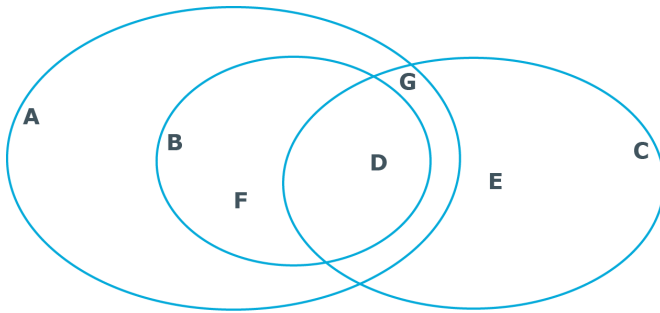
Use the following settings to specify how the data records are processed.

Table 52: Options for handling records

Property	Description
Insert new data set	The data record from the source data does not yet exist in the database. If the option is enabled, the data record is inserted in the database.
Adapting existing records	There is an entry in the database that matches the source data record. If the option is enabled, the data record is updated in the database. If multiple entries exist in the database, which match the source data record, an entry is written to the error log.
Delete records that no longer exist	The database contains an entry that is not contained in the source data. If the option is enabled, the entry is deleted from the database.
Limiting the target objects	Use a condition to limit the quantity of relevant database entries. The condition is tested when importing begins. There is a wizard available through the  button next to the input field, to help you formulate your condition. NOTE: If the Insert new data set option is enabled, source data records that do not fall within the area of relevant database entries

Property	Description
	due to the limit are handled as new data records and inserted in the database. Under certain circumstances, this can lead to errors such as duplicate data records.

Example for handling data sets



Case	Description
A	All objects in the database.
B	Database set restricted by condition.
C	Entry in source data.
D	All entries in the database and in the source data. Typical action: update all entries in the database.
E	Entries that are only in the source data but not in the database. Typical action: add new entry in the database.
F	Entries that are in the database but not in the source data. Typical action: clean up entries in the database.
G	Entries that are in the source data but no in range selected in the database. These entries are treated as in case E although adding entries may cause conflicts in certain circumstances.

Specifying connection variables

Connection variables are set when the import is run immediately and are also added to the generated import script. You can use the variables in customized processes or templates that are executed after importing.

To define a connection variable in the Data Import

1. Click the **+** button on the **Connection variables** page.
2. Click the **Name** entry and enter the variable name
3. Click the **Value** entry and enter the value of the variables.

To delete a connection variable in the Data Import

- Click the **×** button on the **Connection variables** page.

Importing the data

The following methods are available to you to import data:

- Start the data import manually in the Data Import. The data records that are processed during import are logged.
- To execute data imports on a regular basis, create an import script.
You can use the import script in custom processes, for example. To create custom processes to execute the import, use the DataImport process task of the ScriptComponent process component.
For detailed information about installing a workstation, see the *One Identity Manager Configuration Guide*.

Detailed information about this topic

- [Start import immediately](#) on page 125
- [Create an import script](#) on page 126

Start import immediately

To start the import immediately in the Data Import

1. On the **Saving the import definition** page, enable the **Import data** option.
2. To start the import, click **Next**.

After importing has finished the processing result are displayed. If errors occur during the importing process you can view them with **Show**.

| **TIP:** Save the import log with **Save log as file**.

Related topics

- [Create an import script](#) on page 126

Create an import script

NOTE: The import script is stored in the One Identity Manager database. To copy import scripts into the database, the user needs the **Import scripts can be added in the wizard for data import** (DataImport_CreateScript) program function.

To create an import script

1. In Data Import, on the **Saving the import definition** page, enable the **Create import script** option.
2. Enter a name for the import script in **Import script name**.
Only the VB name are permitted. If a character is not permitted, the field is highlighted in red.
3. Select a change label in **Add script to tag**. Use the ... button to create a new change label.
4. To create the import script, click **Next**.
5. Compile the script library after saving the script. Click **Yes** to start the compiler.

Related topics

- [Start import immediately](#) on page 125
- [Working with change labels](#) on page 78

Using an import definition file

The import definition provides you with configuration settings for future data imports. Create the import definition file in the Data Import after creating an import. The import definition is saved as a .xml file.

To save an import definition

1. In the Data Import, on the **Saving the import definition** page, enable the **Save import definition file** option.
2. Click the ... button beside the input field.
3. Select the path and enter the file name.
4. Click **Save**.

Related topics

- [DataImporterCMD.exe](#) on page 148

Importing and exporting individual files for the software update

To distribute new or modified files, such as files from a hotfix package or custom form archives, using the automatic software update function to the workstations and servers, import the files into the Software Loader database using the One Identity Manager program.

All files of a One Identity Manager installation are stored in the One Identity Manager database with their name, repository, content, and a hash value. Each file's assignment to the One Identity Manager tools, such as Manager or One Identity Manager Service, is logged.

When you import a file, the Software Loader initially determines the file status based on the file information in the database. To test the file version, the file size and the hash value are determined and compared to the entry in the database.

After a file is successfully imported into the database, the **software revision** semaphore value in the database is updated by the DBQueue Processor. During the next semaphore test, the file is added to the list of files to be updated and is distributed to the workstations and servers.

To equip individual Job servers with the latest software revision manually, you can use the Software Loader program to export individual files from the One Identity Manager database. During the export, the Software Loader checks whether the file already exists in the specified export directory. If this is the case, the file is updated; otherwise, a new version of the file is created.

For detailed information about updating One Identity Manager and about the automatic software update function, see the *One Identity Manager Installation Guide*.

Detailed information about this topic

- [Importing custom files into a One Identity Manager database](#) on page 128
- [Exporting files from a One Identity Manager database](#) on page 130

Importing custom files into a One Identity Manager database

NOTE: When importing custom files, make sure that the directory structure is correctly generated.

- Files for FAT clients do not generally require a subdirectory. When importing the files, select the One Identity Manager installation directory as a base directory.
- Files for web applications generally require a subdirectory, for example a bin directory. When importing the files, select the installation directory for the web application as a base directory. This ensures that the necessary subdirectories, such as the bin directory, are correctly recognized.
- If a file is required for FAT clients and for web applications, this file must be imported twice; once without a subdirectory and once with a subdirectory.

To import files into a One Identity Manager database

1. Start the Launchpad and log in to the One Identity Manager database.
2. In the **Change & Extend** view, select the **Import files for software update** entry. This starts the Software Loader program.
3. Select **Import into database** on the start page.
4. On the **Connect to database** page, check the One Identity Manager database connection data and change if necessary.
5. Specify the file to be imported on **Select files**.
 - a. Select the base directory where the files can be found.

The status and file size of all the files in the selected directory are displayed in the file list.

Table 53: Meaning of status

Status	Meaning
Version unknown	The file belongs to the known files but has not yet been loaded into the database. There is no version information in the database.
Unknown file	The file is new. The file is in the list of known files but has not been loaded in the database yet. There is no version information in the database.
Version OK	The file version matches the version in the database.
Version modified	The file version has been modified compared with the version in the database.

- b. Select the files you want to load into the One Identity Manager database.

TIP:

- Click a column in the table header to order the display by the selected column.
 - Press **Shift + select** or **Ctrl + select** to select more than one file.
 - To quickly select all files with **Changed version** as their status, select **Open all directories** and **Open all modified files** in the context menu. Files in subdirectories are only selected if the higher-level directories have already been opened.
6. On the **Select change label** page, assign a change label to make it easier to exchange files between various databases, such as the test database, development database and productive database.
 - a. Select **Assign files to following change label**.
 - b. Use the button next to the option to select the change label.
 7. The files are loaded straight from the One Identity Manager database.
 8. Specify other file settings on **Assign machine roles**.
 - a. Assign a computer role to the files.
 - b. (Optional) For more file settings, click ... next to the file names.

Table 54: More file settings

Setting	Description
Directory source	Directory path in installation source.
Create backup	A copy must be made of the file during the automatic software update.
No update	The file is not updated by the automatic software update.

9. Click **Finish** on the last page to end the program.

Related topics

- [Exporting files from a One Identity Manager database](#) on page 130
- [Editing file settings for the automatic software update](#) on page 129

Editing file settings for the automatic software update

When importing files using the Software Loader program, you specify whether a backup copy of the existing file is to be created during the automatic software update. You can

modify these settings later on.

⚠ WARNING: Do not change any other file properties as this can lead to errors during the automatic software update.

To configure the file properties

1. Select the **Base data | Installation | Designer software** in the One Identity Manager category.
2. Select a file.
3. Edit the following master data.

Table 55: File properties

Property	Description
Create backup	During the automatic software update, a backup of the existing file is created for files marked with this option.
No update	The file is not updated by the automatic software update.

Related topics

- [Importing custom files into a One Identity Manager database](#) on page 128

Exporting files from a One Identity Manager database

To export files from a One Identity Manager database

1. Start the Launchpad and log in to the One Identity Manager database.
2. In the **Change & Extend** view, select the **Import files for software update** entry. This starts the Software Loader program.
3. On the home page, select **Export from database**.
4. On the **Connect to database** page, check the One Identity Manager database connection data and change if necessary.
5. Specify which data to export on the **Select files** page.
 - a. Specify the destination directory to which to export the data.
Exportable files are displayed with their status and file size.

Table 56: Meaning of status

Status	Meaning
Unknown file	The file has not yet been exported from the database to the specified directory.
Version OK	The file version matches the version in the database.
Version modified	The file version has been modified compared with the version in the database.

- b. Mark the files to export.

TIP:

- Click a column in the table header to order the display by the selected column.
 - Use **Shift + select** or **Ctrl + select** to select multiple files.
6. The marked files are export to the given directory. This may take some time depending on the number of files selected. The export steps are displayed on the page **Uploading files**. Any export errors are displayed. After exporting is complete, click **Next**.
7. Click **Finish** on the last page to end the program.

Related topics

- [Importing custom files into a One Identity Manager database](#) on page 128

Command line programs

You can use various command line programs for the automation of One Identity Manager implementations.

Detailed information about this topic

- [InstallManager.CLI.exe](#) on page 132
- [DBCompilerCMD.exe](#) on page 134
- [Quantum.MigratorCmd.exe](#) on page 135
- [WebDesigner.InstallerCMD.exe](#) on page 137
- [VI.WebDesigner.CompilerCmd.exe](#) on page 140
- [AppServer.Installer.CMD.exe](#) on page 141
- [SoftwareLoaderCMD.exe](#) on page 145
- [DBTransporterCMD.exe](#) on page 146
- [DataImporterCMD.exe](#) on page 148
- [SchemaExtensionCmd.exe](#) on page 150

InstallManager.CLI.exe

The InstallManager.Cli.exe program provides support for the installation of One Identity Manager. You can run the program from the command line.

| IMPORTANT: Run the InstallManager.Cli.exe program in the administrative context.

Calling syntax

```
InstallManager.Cli.exe -m install|change|remove|uninstall -r {Directory} [-i {Directory}] [-fu] [-mod {ModuleIDs}] [-d {Targets}] [-p {Packages}] [-l {Path}] [-fo] [-cs {Service name} {Properties}] [-dc]
```

Example calls

```
InstallManager.Cli.exe -m install -r c:\sourcedir -mod QER ADS SAP LDAP ATT
```

```
InstallManager.Cli.exe -m change -r c:\sourcedir -d Server\JobServer\ADS
```

```
InstallManager.Cli.exe -m uninstall -i c:\installdir -dc
```

Table 57: Program parameters

Parameters	Alternative	Description
-m	--mode	Installation mode. Permitted values are <ul style="list-style-type: none">• install: Install new modules.• change: Update existing modules.• remove: Delete modules.• uninstall: Uninstall complete installation.
-r	--rootpath	Directory containing the installation sources.
-i	--installpath	Optional parameter. Directory in which to install.
-fo	--filesonly	Optional parameter. Only file actions are executed. No start menu entries or registry keys are generated and no services are installed.
-mod	--module	Space-delimited list of module IDs.
-d	--deploymenttarget	Space delimited list of machine roles.
-p	--packages	Space-delimited list of packages.
-l	--logfile	Optional parameter. Path to the log file.
-fu	--forceupdate	Optional parameter. All data are re-installed.
-cs	--changeservice	Changes the properties for registration of the service. The following values are expected: <ul style="list-style-type: none">• <Service name>: Name of the service to be changed• <Properties>: New properties of the service with;<ul style="list-style-type: none">• <Name>: Name of the service.• <Display>: Display name of the service.• <Description>: Description of the service. Example: "Name=<New name>;Display=<New display>;Description=<New Description>"

Parameters	Alternative	Description
		You only need to specify the properties that are to be changed.
-dc	--deleteconfig	Optional parameter. Configuration data and logs are removed in uninstall mode.
-h	--help	Optional parameter. Display program help.

DBCompilerCMD.exe

The DBCompilerCMD.exe program supports compiling a database. You can run the program from the command line.

Calling syntax

```
DBCompilerCMD.exe /Conn="{Connection string}" /Auth="Module={Authentication string}"
[/LogLevel=Off|Fatal|Error|Info|Warn|Debug|Trace] [-W] [/Blacklist=
[CompileWebServices] [CompileTypedWrappers] [CompileDialogScripts] [CompileScripts]
[CompileJobChains] [CompileWebProjects] [CompileApiProjects] [CompileHtmlApps]
[FillMultiLanguage]]
```

Calling example

```
DBCompilerCMD.exe /Conn="Data Source=<Database server>;Initial Catalog=<Database
name>;User ID=<Database user>;Password=<Password>" /Auth="Module=DialogUser;User=<User
name>;Password=<Password>" -W
```

Table 58: Program parameters

Parameter	Description
/Conn	Database connection parameter. Minimum access level Configuration user .
/Auth	Authentication data. The authentication data depends on the authentication module used. For detailed information about the One Identity Manager authentication modules, see the <i>One Identity Manager Authorization and Authentication Guide</i> .
/LogLevel	Optional parameter. Scope of output to be processed. Permitted values are: <ul style="list-style-type: none"> • Off: No logging. • Fatal: All critical error messages are logged. • Error: All error messages are logged.

Parameter	Description
	<ul style="list-style-type: none"> • Info: All information is logged. • Warn: All warnings are logged. • Debug: Debugger outputs are logged. This setting should only be used for testing. • Trace: Highly detailed information is logged. This setting should only be used for analysis purposes. The log file quickly becomes large and cumbersome.
-W	Optional parameter. Wait for the processing of DBQueue Processor jobs to complete before starting compilation.
/Blacklist	<p>Optional parameter. Space-delimited list of compiler modules that must not be compiled. Permitted values are:</p> <ul style="list-style-type: none"> • CompileWebServices: Compile web services • CompileTypedWrappers: Compile a type-safe database model • CompileDialogScripts: Compile scripts from the script library • CompileScripts: Compile templates, formatting scripts and task definitions • CompileJobChains: Compile processes • CompileWebProjects: Compile web projects • CompileApiProjects: Compile API projects • CompileHtmlApps: Compile HTML applications • FillMultiLanguage: Extract language-dependent texts
/?	Display program help.

Quantum.MigratorCmd.exe

The Quantum.MigratorCmd.exe program supports the migration of a One Identity Manager database. You can run the program from the command line.

Calling syntax

```
quantum.migratorcmd.exe /operation=INSTALL|UPDATE|DUMP|IMPORT|DELTA /connection="{Connection string}"/system=MSSQL /module={Module IDs}[+] /destination="{Directory}" [/loglevel="Off|Fatal|Error|Info|Warn|Debug|Trace"] [/password={Password}] [/moduleowner={Module ID}] [/hashsize=<Hash size>] [/clear] [/condition={SQL condition}] /from {file} /to {file}
```

Calling example

```
quantum.migratorcmd.exe /operation=INSTALL /connection="Data Source=<Database server>;Initial Catalog=<Database>;User ID=<Database user>;Password=<Password>"  
/system=MSSQL /destination="C:\install" /module="TSB,ATT,CPL,HDS,POL,RMB,RMS,RPS"
```

Table 59: Program parameters

Parameters	Alternative	Description
/operation	-O -o	Operation to be performed. Permitted values are: <ul style="list-style-type: none">• INSTALL: Install new database.• UPDATE: Update database.• DUMP: For internal use only.• IMPORT: For internal use only.• DELTA: For internal use only.
/connection	-C -c	Database connection parameter. Minimum access level Administrative user .
/system	-S -s	Database system. Permitted value is MSSQL .
/module	-M -m	Comma delimited list of module IDs. Update case: If the module ID is followed by a plus sign (+), only this module is updated. If no plus sign is specified, all modules listed are updated.
/password	-P -p	Optional parameter. Initial password for the viadmin system user when a new database is installed
/moduleowner	-W -w	For internal use only.
/format	-F -f	For internal use only.
/hashsize		For internal use only.
/destination	-D -d	Source directory .
/condition		For internal use only.
/loglevel		Optional parameter. Scope of output to be processed. Permitted values are: <ul style="list-style-type: none">• Off: No logging.• Fatal: All critical error messages are logged.• Error: All error messages are logged.• Info: All information is logged.• Warn: All warnings are logged.• Debug: Debugger outputs are logged. This setting

Parameters	Alternative	Description
		should only be used for testing.
		<ul style="list-style-type: none"> • Trace: Highly detailed information is logged. This setting should only be used for analysis purposes. The log file quickly becomes large and cumbersome.
/clear		For internal use only.
@filename		As an alternative to directly issuing commands, you can name a text file containing the commands. Every command is in a separate line. Path names in the file must be relative.
/from	--from	For internal use only.
/to	--to	For internal use only.
/?	-h -help	Display program help.

WebDesigner.InstallerCMD.exe

Using the program WebDesigner.InstallerCMD.exe, you can install and uninstall the Web Portal using the command line console.

| NOTE: Run the installation using the command line console in administrator mode.

Calling syntax for installation

```
WebDesigner.InstallerCMD.exe [/prov {Provider}] /conn {Connection string} /authprops
{Authentication string} /appname {Application name} /site {Site} [/sourcedir
{Directory}] [/apppool {Application pool}] [/webproject {Web project}] [/constauthproj
{Subproject name} /constauth {Authentication}] [/searchserviceurl {url}]
[/applicationtoken {Token}] [/updateuser {User name} [/updateuserdomain {Domain}]
[/updateuserpassword {Password}]] [/allowhttp {true|false}] [-f] [-w]
```

Calling syntax for uninstalling

```
WebDesigner.InstallerCMD.exe [/prov {Provider}] /conn {Connection string} /authprops
{Authentication} /appname {Application name} [/site {Site}] -R
```

Calling syntax for uninstalling earlier Web Portal versions (<= version 6.x)

```
WebDesigner.InstallerCMD.exe /appname {Application name} [/site {Site}] -R
```

Table 60: Program parameters

Parameter	Description
/Prov	(Optional) Database provider – permitted values are VI.DB.ViSqlFactory , VI.DB and QBM.AppServer.Client.ServiceClientFactory , QBM.AppServer.Client .
/Conn	Database connection parameters.
/authprops	Authentication data - the authentication data depends on the authentication module. For detailed information about the One Identity Manager authentication modules, see the <i>One Identity Manager Authorization and Authentication Guide</i> .
/appname	Application name.
/site	Website.
/sourcedir	(Optional) If this parameter is set, the installation is performed from the file system. If this parameter is not set, the installation is performed from the database (default).
/apppool	(Optional) If this parameter is set, the installation is performed in the specified application pool. If this parameter is not set, a new application pool is installed (default).
/webproject	(Optional) Web project name - If this parameter is set, the specified web project is installed. If this parameter is not set, the web project VI_StandardWeb is installed (default).
/constauthproj	Name of the sub project.
/constauth	Authentication settings for the sub project.
/searchserviceurl	Application server for search function availability.
/applicationtoken	Application token for the Password Reset Portal.
/updateuser	(Optional) User for updating.
/updateuserdomain	Active Directory domain of the user.
/updateuserpassword	User password.
/allowhttp	(Optional) If the parameter is set, HTTP is permitted. If this parameter is not available, HTTPS is used (default).
-w	(Optional) If the parameter is set, Windows authentication is used. If this parameter is not set, anonymous authentication is used on IIS (default).
-f	(Optional) If this parameter is set, no permissions are allocated for the IIS_USRS user. If this parameter is not set, the

Parameter	Description
	permissions are allocated for the IIS_USRS user (default).
-R	Delete the web application.
/?	Program help.

Example of installation with a direct connection against a SQL Server database.

In this example, the parameters are configured as follows:

- Connection to database on a SQL Server
- Installation in the **default website**
- Application name **testqs**
- Authentication with system user **testadmin**
- Application server for the availability of the search function
`https://dbserver.testdomain.lan/TestAppServer`
- Allow HTTP

```
WebDesigner.InstallerCMD.exe /conn "Data Source=dbserver.testdomain.lan;Initial
Catalog=IdentityManager;Integrated Security=False;User ID=admin;Password=password"
/site "Default Web Site" /appname testqs /authprops
"Module=DialogUser;User=testadmin;Password=" /searchserviceurl
https://dbserver.testdomain.lan/TestAppserver /allowhttp true
```

Example of installation with a direct connection to an application server

In this example, the parameters are configured as follows:

- Connection to application
- Installation in the **default website**
- Application name **testviaappserver**
- With Windows authentication as web authentication
- User for the update **JohnDoe** with the domain **MyDomain.lan**

```
WebDesigner.InstallerCMD.exe /prov "QBM.AppServer.Client.ServiceClientFactory,
QBM.AppServer.Client" /conn "URL=https://test.lan/IdentityManagerAppServer/" /site
"Default Web Site" /appname testviaappserver /authprops
"Module=DialogUser;User=testadmin;Password=" -w /updateuser JohnDoe /updateuserdomain
MyDomain.lan /updateuserpassword topsecret
```

Example of uninstalling the web application with a connection against an application server

```
WebDesigner.InstallerCMD.exe /prov "QBM.AppServer.Client.ServiceClientFactory,
QBM.AppServer.Client" /conn "URL=https://test.lan/IdentityManagerAppServer/" /appname
```

```
testviaappserver /authprops "Module=DialogUser;User=testadmin;Password=" -R
```

Example for the processing of authentication settings for a sub project

```
WebDesigner.ConfigFileEditor.exe -constAuth ../web.config "test_UserRegistration_Web"  
"Module=DynamicPerson;User[test_USER]=xyz;(Password)Password[test_Password]=xyz;  
(Hidden)IgnoreMasterIdentities=;(Hidden)Product=Manager"
```

VI.WebDesigner.CompilerCmd.exe

With the program VI.WebDesigner.CompilerCmd.exe, you can compile the Web Portal using the command line console.

Calling syntax

```
VI.WebDesigner.CompilerCmd.exe /conn {Connection string} /dialog {Authentication  
string} /project {path} [/solution {path}] [/mode {mode}] [-E] [-D] [-R]  
[/csharpout {folder}]
```

Table 61: Program parameters

Parameter	Description
/Conn	Database connection parameter.
/dialog	Authentication data. The authentication data depends on the authentication module used. For detailed information about the One Identity Manager authentication modules, see the <i>One Identity Manager Authorization and Authentication Guide</i> .
/project	Name of the web project.
/solution	Optional parameter. This parameter specifies the Web Designer solution file to be used. If this parameter is not available, a database project is used.
/mode	Optional parameter. This parameter enables you to specify a compilation mode. Permitted values are: <ul style="list-style-type: none">• normal : Full compilation (default mode)• nostore : No assemblies saved to the database.• nocompile : C# code generation runs, but without compilation.• nocodegen : Only Web Designer compilation, no C# code generation.
-E	Optional parameter. This parameter activates the detailed check. For more information about the detailed check, see the <i>One Identity</i>

Parameter	Description
	<i>Manager Web Designer Reference Guide.</i>
-D	Optional parameter. This parameter activates the debug compilation.
-R	Optional parameter. This parameter activates the generation of a stable C# text. This setting prevents use of certain random values.
/csharpout {folder}	Optional parameter. This parameter contains the target directory for C# text.
/help	Program help.

Example based on release compilation of the VI_StandardWeb

```
VI.WebDesigner.CompilerCmd.exe/conn "Data Source=<Database server>;Initial
Catalog=<Database name>; User ID=<Database user>; Password=<Password>" /dialog
"Module=DialogUser;User=<User name>;Password=<Password>" /project VI_StandardWeb
```

Example based on debug compilation of the VI_User_Registration_Web

```
VI.WebDesigner.CompilerCmd.exe /conn "Data Source=<Database server>;Initial
Catalog=<Database name>; User ID=<Database user>; Password=<Password>" /dialog
"Module=DialogUser;User=<User name>;Password=<Password>" /project VI_
UserRegistration_Web -D
```

NOTE: Unlike the default settings in the Web Designer, subprojects are not compiled at the same time. This means that when the VI_StandardWeb is compiled, the dI_UserRegistration_Web is not also compiled at the same time.

AppServer.Installer.CMD.exe

The AppServer.Installer.CMD.exe program supports installing and uninstalling of application servers. You can run the program from the command line.

NOTE: Run the installation using the command line console in administrator mode.

Calling syntax for installation

```
AppServer.Installer.CMD.exe --conn={Connection string} --auth={Authentication string}
--appname={Application name}
[--site={Site}] [--app-pool={Application pool}] [--source-dir={Directory}] [--
deployment-target={Machine role}] [--allow-http] [--windows-auth] [--db-windows-auth]
[--skip-file-permissions] [--runtime-connection={Connection string}] [--hdb-
connection={History Database ID|Connection string}]
[/updateuser {User name} [/updateuserdomain {Domain}] [/updateuserpassword
{Password}]]
```

```
[
    --cert-mode=existing --cert-thumbprint={Thumbprint}
    |
    --cert-mode=new --cert-issuer {Issuer} [--cert-key=1024|2048|4096]
    |
    --cert-mode=newfile --cert-issuer {Issuer} [--cert-key=1024|2048|4096] [--cert-
    file={Path to certificate file}]
]
[--set-connection] [--conn-id={History Database ID}]
[--verbose]
```

Calling example for installing

```
AppServer.Installer.CMD.exe --conn="Data Source=<Database server>;Initial
Catalog=<Database name>;User ID=<Database user>;Password=<Password>" --
auth="Module=DialogUser;User=<User name>;Password=<Password>" --
appname=MyApplicationServer --allow-http
```

Calling syntax for uninstalling

```
AppServer.Installer.CMD.exe --conn={Connection string} --auth={Authentication string}
--appname={Application name} --uninstall
```

Calling example for uninstalling

```
AppServer.Installer.CMD.exe --conn="Data Source=<Database server>;Initial
Catalog=<Database name>;User ID=<Database user>;Password=<Password>" --
auth="Module=DialogUser;User=<User name>;Password=<Password>" --
appname=MyApplicationServer --uninstall
```

Calling example for changing the application server's connection parameters

```
AppServer.Installer.CMD.exe --set-connection --appname=MyApplicationServer --
conn="Data Source=<Database server>;Initial Catalog=<Database name>;User ID=<Database
user>;Password=<Password>"
```

Calling example for changing a History Database's connection parameters

```
AppServer.Installer.CMD.exe --set-connection --appname=MyApplicationServer --conn-
id=<History Database ID> --conn="Data Source=<Database server>;Initial
Catalog=<Database name>;User ID=<Database user>;Password=<Password>"
```

Table 62: Program parameters

Parameters	Alternative	Description
--conn	--connec- tion -c	Database connection parameter. To install an application server you require at least one user with the Configuration user access level. For more detailed information about permissions, see the <i>One Identity Manager Installation Guide</i> and the <i>One Identity Manager Authorization and Authentication Guide</i> .
--auth	--auth- props -a	Authentication data for the installation. The authentication data depends on the authentication module used. For detailed information about the authentication modules, see the <i>One Identity Manager Authorization and Authentication Guide</i> .
--appname		Application name.
--site		(Optional) Website on the Internet Information Services where the application is installed. If the parameter is not set, Default Web Site is used (default).
--app-pool		(Optional) Application pool. If this parameter is set, the installation is performed in the specified application pool. If this parameter is not set, a new application pool is installed (default).
--source-dir	-s	(Optional) Installation source. If this parameter is set, the installation is performed from the file system. If this parameter is not set, the installation is performed from the database (default).
-- deployment- target	-t	(Optional) Machine role for the installation. This parameter can be used more than once. Alternatively, multiple machine role can be separated with a pipe []. If this parameter is not set, the Server Web Appserver machine role is used.
--allow-http		(Optional) If the parameter is set, HTTP is permitted. If this parameter is not available, HTTPS is used (default).
--windows- auth	-w	(Optional) Type of authentication used for the web application. If this parameter is set, Windows authentication is used. If this parameter is not set, anonymous authentication is used on IIS (default).
--db- windows- auth		(Optional) Type of authentication used for the One Identity Manager database. If this parameter is set, Windows authentication is used. If this parameter is not set, the SQL login from the connection parameters is used.

Parameters	Alternative	Description
--skip-file-permissions	-f	(Optional) If this parameter is set, no permissions are allocated for the IIS_USRS user. If this parameter is not set, the permissions are allocated for the IIS_USRS user (default).
--runtime-connection	--run-conn	(Optional) Database connection parameters used as authentication for the One Identity Manager database, for example, if the application server is run with the end user access level. If this parameter is not set, the SQL Server login from the connection parameters is used for the installation (default).
--update-user		(Optional) User for updating. If no user is given, the same user account is used for the application pool.
--update-user-domain		Active Directory domain of the user.
--update-user-password		User password.
--cert-mode		(Optional) Type of certificate selection. Permitted values are: <ul style="list-style-type: none"> • existing: Uses an existing certificate. • new: Uses a new certificate. • newfile: Creates a new certificate file. (default)
--cert-thumbprint		Thumbprint of the certificate if an existing certificate is used.
--cert-issuer		Issuer of the certificate if a new certificate or a new certificate file is created. Example: "CN=Application Server"
--cert-key		Length of the certificate's key 1024 , 2048 (default), and 4096 are permitted.
--cert-file		(Optional) Directory path and name of the certificate file if a new certificate file is created. If this parameter is not set, " App_Data\SessionCertificate.pfx " is used.
--hdb-connection		(Optional) History Database connection parameter. This value is a combination of the ID and the connection parameter (pipe () delimited). Example: "<History Database ID> key1=value1;key2=value2;..."
--set connection	-S	Changes the connection parameters for an installed application.

Parameters	Alternative	Description
--conn-id		(Optional) Connection parameter identifier. If this parameter is not set, the application server's own connection parameters are used.
--uninstall	-R	Removes the application server.
--verbose	-v	Detailed log of exception errors.
--help	-h, -?	Display program help.

Parameter formats:

Multiple-character options can be given in the following forms:

```
--conn="..."
```

```
--conn "..."
```

```
/conn="..."
```

```
/conn "..."
```

Single-character options can be given in the following forms:

```
-c="..."
```

```
-c "..."
```

```
/c="..."
```

```
/c "..."
```

Switches are allowed in the forms:

```
-R
```

```
/R
```

SoftwareLoaderCMD.exe

Using the SoftwareLoaderCMD.exe program, you can import files into the One Identity Manager database. You can run the program from the command line.

Calling syntax

```
SoftwareLoaderCMD.exe /Conn="{Connection string}" /Auth="{Authentication String}"
[/Root="{Path}"] [-I] /Files="{files|Targets}"
```

Calling example

Updating files that are known in the QBMFileRevision table.

```
SoftwareLoaderCMD.exe /Conn= "Data Source=<Database server>;Initial Catalog=<Database name>;User ID=<Database user>;Password=<Password>" /Auth="Module=DialogUser;User=<User name>;Password=<Password>" /Root="c:\source" -N
```

Importing customer-specific files

```
SoftwareLoaderCMD.exe /Conn= "Data Source=<Database server>;Initial Catalog=<Database name>;User ID=<Database user>;Password=<Password>" /Auth="Module=DialogUser;User=<User name>;Password=<Password>" /Root="c:\customsource" -I
/Files="Custom.*.dll|Server|Client"
```

Table 63: Program parameters

Parameter	Description
/Conn	Database connection parameter. Minimum access level Configuration user .
/Auth	Authentication data. The authentication data depends on the authentication module used. For detailed information about the authentication modules, see the <i>One Identity Manager Authorization and Authentication Guide</i> .
/Root	Optional parameter. Directory for the files.
-I	Optional parameter. Only in combination with /Files. If this parameter is not set, only the files that are already known in the QBMFileRevision table are imported. If this parameter is set, unknown files are also imported into the databased and an entry is created in the QBMFileRevision table.
/Files	List of files with pipe-delimited () specification of machine roles that are imported into the database. The entry of wild cards (*) is permitted. Example: /Files="Custom.*.dll Server Client"
-N	Optional parameter. If this parameter is set, all files are updated which are known in the QBMFileRevision table and which are located in the directory specified under /Root. /Conn, /Auth and /Root are mandatory parameters in this mode. -I and /Files are not taken into account.
-?	Display program help.

DBTransporterCMD.exe

Using the DBTransporterCMD.exe program, you can import transport packages into the One Identity Manager database. You can run the program from the command line.

Calling syntax

```
DBTransporterCMD.exe [-V] [-L] [-I|-P|-S] [-N] [-U] /File="{Transport file}" /Conn="{Connection string}" /Auth="{Authentication String}"  
[/MergeAction=Error|Transport|Database|Interactive]
```

Calling example

```
DBTransporterCMD.exe [-L] /File="c:\source\transport.zip" /Conn="Data Source=<Database server>;Initial Catalog=<Database name>;User ID=<Database user>;Password=<Password>"  
/Auth="Module=DialogUser;User=<User name>;Password=<Password>"
```

Table 64: Program parameters

Parameter	Description
/Conn	Database connection parameter. Minimum access level Configuration user .
/Auth	Authentication data. The authentication data depends on the authentication module used. For more information about One Identity Manager authentication modules, see the <i>One Identity Manager Authorization and Authentication Guide</i> .
/File	Transport file to be imported into the database.
/MergeAction	(Optional) Definition of conflict handling. Permitted values are: <ul style="list-style-type: none">• Error: An error occurred.• Transport: (Default) Values are transferred from the transport package.• Database: Database values are retained.• Interactive: User entry for conflict handling expected for each object.
-V	If this option is set, logging is performed automatically.
-L	If this option is set, a log file is generated for the data import.
-I	If this option is set, errors in insertion and saving are ignored.
-P	If this option is set, errors in insertion are ignored.
-S	If this option is set, saves during insertion are ignored.
-N	If this option is set, the database is not compiled.
-U	If this option is set, the database is not set to single user mode.
-?	Display program help.

DataImporterCMD.exe

The DataImporterCMD.exe program provides support for importing data from CSV files into a One Identity Manager database. You can run the program from the command line. The program requires the import definition files for import. You create import definition files using the Data Import program.

Calling syntax

```
DataImporterCMD.exe /Conn="{Connection string}" /Auth="{Authentication String}"  
[/Prov="{Provider}"] [/Definition="{Path to import definition file}"] [/ImportFile="  
{path to import file}"] [/DefinitionPair="{Path to import definition file}|{path to  
import file}"] [/LogLevel=Off|Fatal|Error|Info|Warn|Debug|Trace] [/Culture="{Language  
code}"] [-p]
```

Example call for importing a single file

```
/Prov=VI.DB.ViSqlFactory, VI.DB  
/Conn= "Data Source=<Database server>;Initial Catalog=<Database name>;User  
ID=<Database user>;Password=<Password>"  
/Auth=Module=DialogUserAccountBased  
/Defintion=C:\Work\Import\Data\Def_DataImporter_Employee.xml  
/ImportFile=C:\Work\Import\Data\1_Employees.csv
```

Example call for importing multiple files

```
/Prov=VI.DB.ViSqlFactory, VI.DB  
/Conn= "Data Source=<Database server>;Initial Catalog=<Database name>;User  
ID=<Database user>;Password=<Password>"  
/Auth=Module=DialogUserAccountBased  
/DefinitionPair=C:\Work\Import\Data\Def_DataImporter_  
Employee.xml|C:\Work\Import\Data\1_Employees.csv  
/DefinitionPair=C:\Work\Import\Data\Def_DataImporter_  
Department.xml|C:\Work\Import\Data\2_Departments.csv  
/DefinitionPair=C:\Work\Import\Data\Def_DataImporter_  
Locality.xml|C:\Work\Import\Data\3_Localities.csv  
/DefinitionPair=C:\Work\Import\Data\Def_DataImporter_  
CostCenter.xml|C:\Work\Import\Data\4_CostCenters.csv
```

Table 65: Program parameters

Parameter	Description
/Conn	Database connection parameter. Minimum access level End user
/Auth	Authentication data. The authentication data depends on the authentication module used. For detailed information about One Identity Manager authentication modules, see the <i>One Identity Manager Authorization and Authentication Guide</i> .
/Prov	Optional parameter. Database provider. The following values are permitted: VI.DB.ViSqlFactory , VI.DB and QBM.AppServer.Client.ServiceClientFactory , QBM.AppServer.Client .
/Definition	Path to the import definition file. Example: C:\Path\To\Definition.xml
/ImportFile	Path to the import file. Multiple instances of this parameter are possible. The import definition file specified in the /Definition parameter is used. Example: C:\Path\To\Import.csv
/DefinitionPair	Pair of the import definition file and the import file. The files are separated by a pipe character (). Multiple instances of this parameter are possible. Example: C:\Path\To\Definition.xml C:\Path\To\Import.csv
/LogLevel	Optional parameter. Scope of output to be processed. Permitted values are: <ul style="list-style-type: none"> • Off: No logging. • Fatal: All critical error messages are logged. • Error: All error messages are logged. • Info: All information is logged. • Warn: All warnings are logged. • Debug: Debugger outputs are logged. This setting should only be used for testing. • Trace: Highly detailed information is logged. This setting should only be used for analysis purposes. The log file quickly becomes large and cumbersome.
/Culture	Optional parameter. Language used to create the file. The language is required in order to read local character formats correctly, for example,

Parameter	Description
	dates. Example: en-US
-p	Optional parameter. If this parameter is used, the processing progress is shown.
-?	Display program help.

Related topics

- [Importing data from a CSV file](#) on page 112

SchemaExtensionCmd.exe

The SchemaExtensionCmd.exe program provides support for importing custom schema extensions into a One Identity Manager database.

In databases with a **Test environment** or **Development system** staging level, you can use the program to delete custom schema extensions again.

You can run the program from the command line. The program requires a control file (XML file) for the import. To create control files, use the Schema Extension program. For more detailed information, see the *One Identity Manager Configuration Guide*.

Calling syntax

```
SchemaExtensionCmd.exe /Conn="{Connection string}" /Auth="{Authentication String}"
[/Definition="{Path to import definition file}"] [-f]
[/LogLevel=Off|Fatal|Error|Info|Warn|Debug|Trace]
```

Calling example

```
SchemaExtensionCmd.exe /Conn="Data Source=<Database server>;Initial Catalog=<Database name>;User ID=<Database user>;Password=<Password>" /Auth=Module=DialogUserAccountBased
/Definition=CustomExtensions.xml
```

Table 66: Program parameters

Parameter	Description
/Conn	Database connection parameter. Minimum access level Configuration user .
/Auth	Authentication data. The authentication data depends on the authentication module used. For detailed information about the One Identity Manager authentication modules, see the <i>One Identity Manager Authorization and</i>

Parameter	Description
<i>Authentication Guide.</i>	
/Definition	Path to the control file (XML file) Example: C:\Path\To\Definition.xml
/LogLevel	Optional parameter. Scope of output to be processed. Permitted values are: <ul style="list-style-type: none"> • Off: No logging. • Fatal: All critical error messages are logged. • Error: All error messages are logged. • Info: All information is logged. • Warn: All warnings are logged. • Debug: Debugger outputs are logged. This setting should only be used for testing. • Trace: Highly detailed information is logged. This setting should only be used for analysis purposes. The log file quickly becomes large and cumbersome.
-f	Optional parameter. if this parameter is set, the system does not wait for the processing of DBQueue Processor tasks. This can lead to errors if schema extensions are expected that must previously be generated by the DBQueue Processor.
-?	Display program help.

One Identity solutions eliminate the complexities and time-consuming processes often required to govern identities, manage privileged accounts and control access. Our solutions enhance business agility while addressing your IAM challenges with on-premises, cloud and hybrid environments.

Contacting us

For sales and other inquiries, such as licensing, support, and renewals, visit <https://www.oneidentity.com/company/contact-us.aspx>.

Technical support resources

Technical support is available to One Identity customers with a valid maintenance contract and customers who have trial versions. You can access the Support Portal at <https://support.oneidentity.com/>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to videos at www.YouTube.com/OneIdentity
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product

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