One Identity Manager 8.2

User Guide for One Identity Manager
Tools User Interface

Contents

About this guide

The *One Identity Manager User Guide for One Identity Manager Tools User Interface* is intended for end users, system administrators, consultants, analysts, and other IT professionals who want to learn about secure handling of One Identity Manager tools, especially the Manager and the Designer.

The interfaces of the Manager and Designer have a similar layout. The basic elements and functions of the user interface are the same for all of the One Identity Manager tools. The user interface layout is explained based on the example of the Manager. Default functions used in connection with the Manager Designer are described.

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.

The *One Identity Manager Operational Guide* describes the special tasks and functions offered by the two tools to support One Identity Manager while it is running.

The Manager is the main administration tool for setting up information about employees and their identities. It displays and maintains all the data required for the administration of employees, their user accounts, permissions, and company-specific roles in a One Identity Manager network. Company resources employees require can be entered and assigned to them.

You can also use the Manager to:

- Define custom IT policies.
- Set up an IT Shop from which company resources and assignments can be requested.
- Set up special approval processes for authorizing requests and checking compliance to IT policy.
- Set up attestation procedures for regularly testing the correctness of data about employees or roles and their assignments.

By implementing One Identity Manager application roles, every One Identity Manager user obtains only those permissions they require to fulfill necessary administrative duties.

The Designer is the main configuration component in One Identity Manager. The program offers an overview of the entire One Identity Manager data model. It enables the configuration of global system settings, for example, languages, or configuration parameters such as customizing user interfaces for the various administration tools. It also allows the permissions structure to consolidate the various administrative tasks of each

user and user groups. Another important task is the definition of workflows for technically illustrating the administration procedures in the company.

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.

One Identity Manager tools user interface

The user interface layout is explained based on the example of the Manager. The basic elements and functions of the user interface are the same for all of the One Identity Manager tools.

Certain components of the One Identity Manager's graphical user interface are stored in the One Identity Manager schema and can be tailored to suit customer requirements. Menu items in the navigation structure, interface forms, and task definitions can be configured in this way.

Menu items, interface forms, and task definitions are assigned to permissions groups. The user's effective components of the user interface depend on the authentication module used for logging in to the One Identity Manager tools. If a user logs in to a One Identity Manager tool, a system user is found and the available menu items, interface forms, task definitions, and individual program functions are identified depending on the permission groups to which this system user belongs and the adapted user interface is loaded.

Data is displayed as objects in the user interface. User interface objects are meta-objects. You provide a selection of configurable elements that describes how the data stored in the database is perceived. These objects enable data to be distinguished by specific properties. They provide an additional control function for configuring the user interface. Hence, interface forms and tasks are linked to object definitions, which means that different forms and tasks are displayed in the user interface depending on which object is selected.

For more information about how to customize the user interface to your specific requirements, see the *One Identity Manager Configuration Guide*.

The user interface layout

You can control the One Identity Manager tools' graphical user interface with using mouse and key combinations. A minimum screen resolution of 1280 x 1024 pixels is recommended with at least 16 bit color for the best display.

The user interface consists of the following components:

A. Title bar

In the title bar, you can see the program icon, program name, and connected database shown using the notation `<user>@<database server>\<database (description)>`.

B. Menu bar

The menu bar gives you different menus and menu items. The menus **Database** and **Help** are always there. If a database is open, you can see more menus.

C. Toolbar

Each program component comes with its own toolbar.

D. Editing section

The editing section has different views for displaying and editing data.

E. Status bar

The status bar displays different status data. Some status data is shown by way of icons. Which icons are displayed is partially dependent on the program settings selected.

Figure 1: Manager user interface
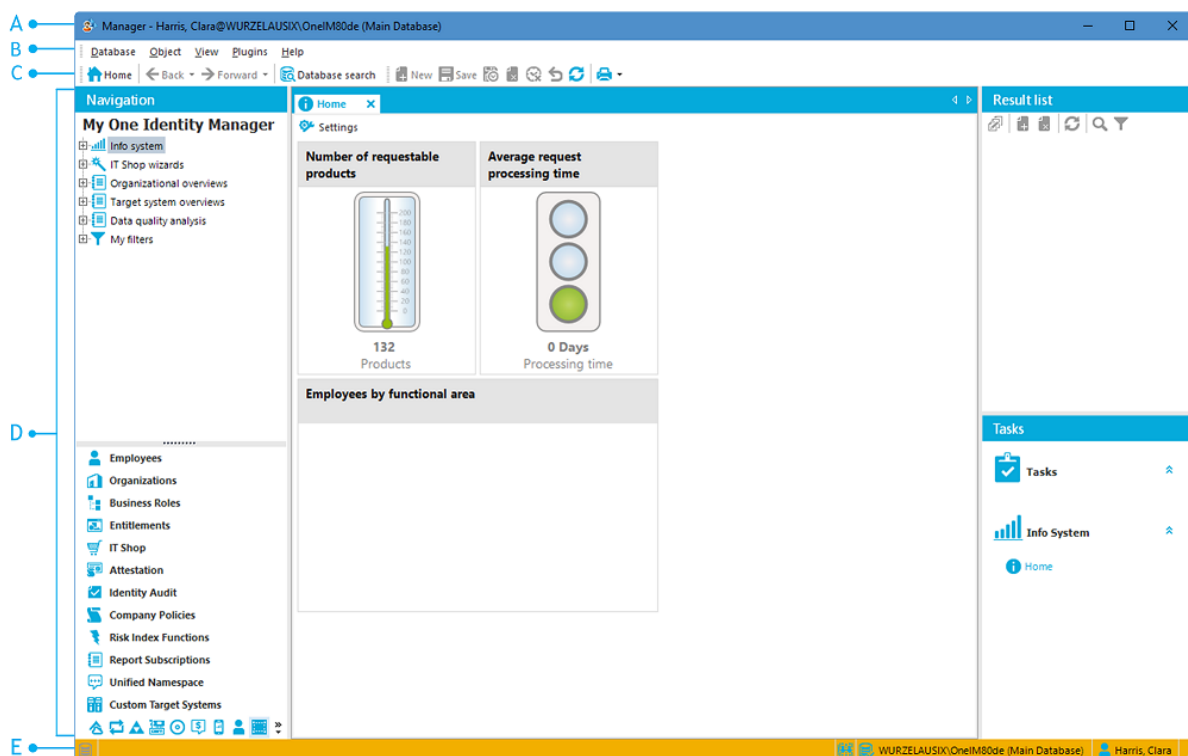
Using the help in the Manager

You can access One Identity Manager documentation in the Manager by selecting the **Help > Search in local help** menu item.

You can display the help for the individual Manager forms using the **Help > Form help** menu item or **F1**.

With some forms, a separate dialog box appears. Use the help icon (?) in the title bar of the dialog window to open the help for a dialog window.

Every form also has a help display for the columns shown. Clicking on the help icon ❓ changes the cursor into the help icon. You can then click a column description to display tips about using the column in the form of tooltips.

Status bar information in the Manager

The status bar displays different status data. Some status data is shown by way of icons. Which icons are displayed is partially dependent on the program settings selected. The status bar comes in different colors.

Table 1: Meaning of the colors

Color	Meaning
none	Development environment database is connected.
Red	Simulation mode is enabled.
Green	Test environment database is connected.
Yellow	Productive environment database is connected.

Table 2: General icons in the status bar

Icon	Meaning
👤	Current user.
⚙	The DBQueue Processor was stopped.
🖥	The services were stopped.
🗄	The database is connected.
🗄	Database status (database activity such as loading or saving objects).
▦	The database must be compiled.
🗄	The database is in recovery mode. It is not possible to process data at this time.

Icon	Meaning
⚠	There are invalid script assemblies. The database must be compiled.
!	No connection.
🟡	Display for step-by-step preparation of a database update. All database users will be informed about the upcoming update. The system does accept anymore processes.
🟠	Display for step-by-step preparation of a database update. Users cannot log in to the database anymore. All running processes will still be completed.
🔴	Display for step-by-step preparation of a database update. The database is updating.

Table 3: Additional icon in the status bar in the Manager

Icon	Meaning
📝	Quick edit mode is enabled.
▦	The field definitions (technical tables and column names) are displayed.
⊡	Additional information on the navigation objects is displayed.
🗄	The program is in simulation mode.
🔄	The system data was modified.
⚠	A warning has been written to the error log.
❌	An error message has been written to the error log.

The Manager's status bar also shows the following information:

- The connected database in the following format: `<Server>\<database (description)>`
- The definition of the current object
- The name of the activated form in the following format: `<logical form> [(<physical form>)]`

TIP: Double-click the name in the status bar to copy the object definition, the form name or the database connection name to the clipboard.

Related topics

Current user

The program's status bar shows the name of the current user. Depending on the authentication module used, this can be the full name of the person or the designation of the current system user. Use the tooltip to show the full name of the current user and the current system user.

To get more information about the current user

- To display user information, double-click the 👤 icon in the program status bar.

Table 4: Extra information about the current user

Property	Meaning
System users	Name of system user
Authenticated by	Name of the authentication module used for logging in.
Employee UID (UserUID)	Unique ID for the current user's employee if an employee related authentication module is used to log in.
SQL access level	Access level of the database server used to log in.
Read-only	The system user has only has read permissions. Modification to data are not possible.
Dynamic user	The current user uses a dynamic system user. Dynamic system users are applied when a role-based authentication module is used.
Administrative user	The current user uses an administrative system user.
Remarks	More details about the system user in use.
Permissions group	Permissions groups that are assigned to the system user. The permissions groups determine the user's user interface and object permissions.
Program functions	Program functions assigned to the system user The menu items and functions available depend on the program functions.

Changing the password of the logged in user

To change the password:

1. Select the **Database > Change password** menu item and enter the following information:

- **Old password**: Enter the previous password.
- **New password**: Enter the new password.
- **Confirm new password**: Enter the new password again.

   NOTE: The password must comply with the password policy. To display the requirements, click the **Password requirements** link.

2. Save with **OK**.

Menu items in the Manager

Table 5: Meaning of items in the menu bar

Menu	Menu item	Meaning	Shortcut
Database	New connection	Establishes a database connection.	Ctrl + Shift + N
	Close connection	Closes the current database connection.	
	Change management	Opens a dialog box for editing change labels. This menu item is only available in expert mode.	
	Start/stop simulation	The program switches to simulation mode or to working mode. For detailed information about the simulation, see the *One Identity Manager Operational Guide*.	
	Change management	Opens a dialog box for editing change labels. This menu item is only available in expert mode. For detailed information about working with change labels, see the *One Identity Manager Operational Guide*.	
	Export data	A form opens in which you can confirm the export data. For detailed information about exporting data, see the *One Identity Manager Operational Guide*.	
	Show deferred operations	Deferred operations are displayed. For detailed information about planning activation times, see the *One Identity Manager Operational Guide*.	

Menu	Menu item	Meaning	Shortcut
	Pending changes	Shows changes pending for objects and their processing status.	
	Check data consistency	This opens the consistency check form. For detailed information on checking data consistency, see the *One Identity Manager Operational Guide*.	
	Change password	The logged in user can change the password.	
	Settings	For configuring general program settings.	
	Exit	Exits the program.	Alt + F4
Object	New	A new object with the displayed object type is added.	Ctrl + N
	Save	Saves all changes to an object.	Ctrl + S
	Set the change time stamp	You can set the time of the change. For detailed information about planning activation times, see the *One Identity Manager Operational Guide*.	
	Delete	Deletes selected object.	Ctrl + D
	Set the deletion time	You can set the time that the object is deleted. For detailed information about planning activation times, see the *One Identity Manager Operational Guide*.	
	Undo delete	After confirmation, the deletion process is reversed. This option is only available if the object was marked for deletion.	
	Discard changes	Any unsaved form entries are discarded.	Ctrl + Shift + D
	Reload	The object is reloaded.	Ctrl + F5
	Properties	Show other properties of the active object. This menu item is only available in expert mode.	
	Reapply templates	All object templates are reapplied. This menu item is available only in the object's main data form.	
	Add to favorites or remove from	Add the current object to your favorites or remove it from your favorites. These options are shown alternately.	Ctrl + B

Menu	Menu item	Meaning	Shortcut
	favorites		
	Back	Shows the previous form in the order in which the forms were viewed.	Alt + left arrow
	Forward	Shows the next form in the order in which the forms were viewed.	Alt + right arrow key

One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface
One Identity Manager tools user interface

16

Menu	Menu item	Meaning	Shortcut
View	Navigation	Activates the navigation view.	Ctrl + Q
	Result list	Opens the result list.	Ctrl + R
	Documents	Enables the current document.	Ctrl + O
	Favorites	Shows or hides the favorites list.	
	Tasks	Shows or hides the task view.	
	Error log	Shows or hides the error log.	
	Process Information	Shows or hides the process view.	
	TimeTrace	Shows or hides the TimeTrace. For detailed information about TimeTrace, see the *One Identity Manager Operational Guide*.	
	Database search	Shows or hides the database search.	
	Start page	The start page is displayed.	
	Enable quick edit mode	The quick editing of objects is enabled or disabled.	
	Close current document	Closes the current document.	F4
	Close all documents	Closes all open documents.	
	Enable document	Shows all open documents. You can toggle from one open document to the next.	
	Layout	Changes the layout of the program's interface.	Ctrl + Shift + L (loads in expert mode)
	Display field definitions	The technical table and column names are shown in the editing forms. This menu item is only available in expert mode.	
	Display navigation objects	Displays the loaded navigation objects. This entry is available only if the program setting **Show additional navigation information** is enabled.	
Plugins	Name of the plugin.	Shows the available plugins so that you can apply them.	

Menu	Menu item	Meaning	Shortcut
Help	Community	Opens the One Identity Manager community website.	
	Support portal	Opens the One Identity Manager product support website.	
	Training	Opens the One Identity Manager training portal website.	
	Online documentation	Opens the One Identity Manager documentation website.	
	Search	Opens the search dialog box.	
	Form help	Opens the help for this form.	F1
	Info	Shows the version information for program.	

Table 6: Toolbar functions

Icon	Meaning
🏠	Show homepage.
←	Show the previous form in the order in which the forms were viewed. You can see the form history from the selection menu. You can select any form you wish from here.
→	Show the next form in the order in which the forms were viewed. You can see the form history from the selection menu. You can select any form you wish from here.
🔍	Show or hide the database search dialog.
➕	Add a new object of that object type.
💾	Saves changes.
🕒	Set time at which to save an object's changes. For detailed information about planning activation times, see the *One Identity Manager Operational Guide*.
❌	Deletes object.
⊗	Set time at which to delete the selected object. For detailed information about planning activation times, see the *One Identity Manager Operational Guide*.
⤺	Redo delete. This option is only available if the object was marked for deletion.
↩	Discard unsaved changes from the form.
🔄	Update object.
⭐	Add object to favorites.
⭐	Remove object from favorites.
🖨	Print form. Printer settings are configured in the configuration menu.

Views in the Manager

The editing area in the Manager has different views for displaying and editing data.

Table 7: Views in the editing area

View	Description
Navigation view	The navigation view shows suggested navigation starting points for the current user.
Result list	When you select a menu item in the navigation view, the result lists shows all the objects that correspond to the object definition and the conditions of the menu item.
Document view	The document view shows the forms to edit a selected object.
Task view	The task view shows the tasks and reports available for an object.
Favorites list	This view is used to compile individual menu items into a user-specific favorites list.
Error log	The error log shows errors and warnings that occurred when working with the Manager. For detailed information about Error log, see the *One Identity Manager Process Monitoring and Troubleshooting Guide*.
Process Information	This view is used to analyze the process data resulting from data changes. For detailed information about the evaluation of process information, see the *One Identity Manager Operational Guide*.
TimeTrace	In this view you can track changes to an object that were made up to any point in the past. For detailed information about TimeTrace, see the *One Identity Manager Operational Guide*.

Detailed information about this topic

Layout mode in the Manager

The Manager can display the editing area in standard mode or expert mode. The layout of the default view varies between modes. The current user's layout is saved in the user configuration so that when you restart the program the last layout you used is shown.

Detailed information about this topic

- Simple layout mode in the Manager on page 20
- Expert mode in the Manager on page 20

Simple layout mode in the Manager

The simple layout mode provides two other layouts in addition to the default layout.

To select the simple layout mode in the Manager

1. In the Manager, select the **Database > Settings** menu item.
2. On the **User** tab, disable the **Enable expert mode** option.

To change the layout in the Manager

- To specify a layout in the Manager, select the **View > Layout > View 1** or the **View > Layout > View 2** menu item.
- To reset the layout to the default setting in the Manager, select the **View > Layout > Restore default** menu item.

Related topics

- Expert mode in the Manager on page 20

Expert mode in the Manager

In expert mode you can use the mouse to change the position and size of the editing windows in the user interface. You can use the pin in the title bar of a window to enable or disable the auto-hide mode. If this mode is enabled, the selected window slides out of or into the area. To select a window in auto-hide mode, use the symbol in the navigation toolbar on the side. There are other menu items and functions available in expert mode.

To select expert mode in the Manager

1. In the Manager, select the **Database > Settings** menu item.
2. On the **User** tab, enable the **Enable expert mode** option.

To change the layout in the Manager

- To save the layout in the Manager, select the **View > Layout > Save** menu item and enter a **Name**.

- To load a layout in the Manager, select the **View > Layout > Load** or **Ctrl + Shift + L** menu item.

- To reset the layout to the default setting in the Manager, select the **View > Layout > Restore default** menu item.

Table 8: Other menu items in expert mode

Menu	Menu item	Meaning	Shortcut
Database	Change management	Opens a dialog box for editing change labels.	
View	Display field definitions	The technical table and column names are shown in the editing forms.	
	Layout > Save	Save the current layout.	
	Layout > Load	Load a layout.	Ctrl + Shift + L
Object	Properties	Show other properties of the active object.	

Table 9: Additional context menu items

Context menu	Meaning
Definition	This shows advanced technical information about configuring a menu item. This menu item is only available in navigation view. You must also enable the **Show additional navigation information** program setting.
Properties	Shows other properties of the object.

Related topics

- Simple layout mode in the Manager on page 20
- Displaying the column names on page 34
- Detailed information about the user interface on page 60
- Displaying extended properties for objects on page 78

Features in the navigation view

The navigation structure of the user interface is hierarchical and allows users to drill down to the selection of an object definition. The top level of the hierarchy is used to classify the data managed by One Identity Manager into specified categories. Categories include a

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One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface   **21**
One Identity Manager tools user interface

range of different menu items. Select a category on the category tab. You can configure additional settings in the configuration menu.

Figure 2: Navigation view in the Manager with the "Organizations" category as an example
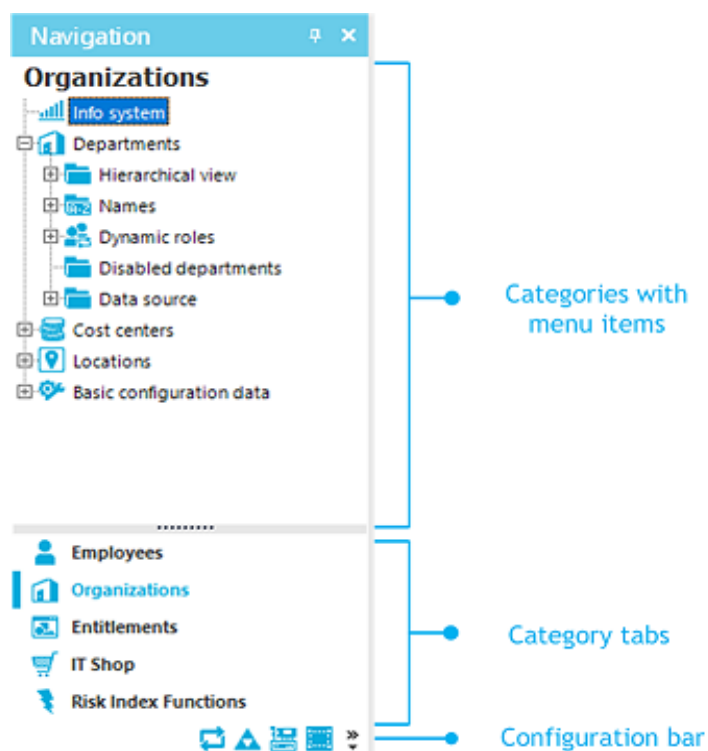
> **TIP:** If menu items are linked to preprocessor-relevant configuration parameters, you can display the preprocessor conditions behind the menu items. To do this, enable the program setting **Show additional navigation information**.

Specific mouse commands are available:

- You can open or close a menu item by double-clicking on the entry name.
- Click the name of the menu item to show the found objects in the result list, as long as a corresponding object for that object type is found. If there are no objects for a defined menu item, an empty result list is shown.

Table 10: General key combinations for the navigation view

Shortcut	Action
Ctrl + Q	Activate navigation structure.
Down arrow, up arrow, page down key, page up key, home, end	Move up/down the navigation structure.
<+> or right arrow key	Open menu item.

Shortcut	Action
<-> or left arrow key	Close menu item.
Data	Select an entry.
F5	Update the navigation view.

The navigation view has its own context menu. Menu commands are shown or hidden depending on the selected menu item.

Table 11: Entries in the context menu of the navigation view in the Manager

Context Menu Item	Meaning
New	A new object with the selected object type is added. Already entered insert values are applied.
Open on new tab	The object is opened in a new form in the document view.
Refresh view	Updates the navigation view.
Search	The system searches for objects in the navigation.
Add to my One Identity Manager	Copies the selected menu item to the **My One Identity Manager** category. This helps you navigate quickly to frequently used menu items. The data is saved in the user configuration.
Add to favorites	Adds the selected object to your favorites.
Remove from favorites	Removes the selected object from your favorites.
Show process information	The process view shows the process data for the selected object. For detailed information about the evaluation of process information, see the *One Identity Manager Operational Guide*.
Tasks	The available tasks for the object are displayed and you can run the desired task.
Definition	Shows detailed information about configuring the menu item. This menu item is only available in expert mode.
Show deferred operations	Shows the deferred operations for the objects in this category. For detailed information about planning activation times, see the *One Identity Manager Operational Guide*.

The navigation view features a configuration bar with its own configuration menu.

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One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface
One Identity Manager tools user interface

23

To open the configuration menu of the navigation view

- Use the **>>** button.

Table 12: Entries in the navigation view configuration menu

Entry in config-uration menu	Meaning
Show more categor-ies	More categories are shown in the list. The category icon is removed from the configuration bar.
Show fewer categor-ies	More categories in the list are hidden. These are represented by icons in the configuration bar.
Settings	Opens the program settings.
Add or remove categories	Categories can be removed from or added to the list.

Related topics

My One Identity Manager

The category **My One Identity Manager** shows the user-specific entries in the Manager. All the available infosystems and specific reports for the current user are shown here. In this category you can create and apply user-specific filters.

To copy a menu item to the My Manager category in One Identity Manager

- Click **Add to My** .One Identity Manager

  This helps you navigate quickly to frequently used menu items. The data is saved in the user configuration.

To delete a menu item from the My Manager category in One Identity Manager

- Click **Remove from My** .One Identity Manager

Table 13: Additional entries in the context menu for the my One Identity Manager category

Context Menu Item	Meaning
Remove from My	Removes the selected menu item from this category.

Context Menu Item	Meaning
One Identity Manager	
New filter	Search criteria for database queries are saved as filters.
Edit filter	The selected filter can be edited.
Remove filter	Deletes the selected filter.
Attaching	The selected filter is attached to a category. When you select a category, all objects that correspond to the filter are shown on a separate form page.
Export filter	Exports the selected filter as an XML file.
Import filter	Imports filters that exist as XML files.

Related topics

Functions in the result list

The result list shows all the objects that correspond to the object definition and the conditions of the selected menu entry. Select an entry from the list. The object is loaded and the first available form appears in the document view. If there are no objects for the selected menu entry, the document view continues to show the most recently selected form.

A list title is shown in the title bar of the result list. This depends on which menu item in the navigation structure was used to select the object. This list title also contains the number of elements in a list.

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One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface   **25**
One Identity Manager tools user interface

Figure 3: Example for result list in the Manager

In the result list, an object is marked with the symbol that was set when the interface was configured. If an object is deleted by the One Identity Manager Service, the object is initially marked for deletion. It is permanently deleted only after a set time period. Objects that are selected for deletion are marked with the icon ⬚.

NOTE: Objects marked for deletion are struck through on the overview form.

By default, an object is loaded by means of a double-click and the first available form is displayed in the document view.

To load objects with a single click

1. Select the **Database > Settings** menu item.
2. On the **User** tab, activate the **Use single clicks** option.

Select single objects one after the other to update the opened form in the document view. Only one form is open at a time.

To display multiple forms in the document view:

- Use **Alt + Click** or click **Open on new tab** from the context menu to open the objects.

  This means that you can quickly switch between objects without having to reload the object from the list again. The forms stay open when you switch between categories.

To edit multiple objects at the same time:

1. Use **Shift + selection** or **Ctrl + selection** to select the objects in the result list.
2. Open the main data form using **Input**, the corresponding icon in the result list or the **Tasks > Change main data** context menu item.

New objects are displayed below the **Added** entry in the result list. The objects used are displayed below the **Recently used** entry in the result list.

To display recently used objects in the Manager

1. Select the **Database > Settings** menu item.
2. On the **User** tab, activate the **Show recently used objects** option and enter the **Object type count**.

Table 14: Common key combinations for the result list in the Manager

Shortcut	Action
Ctrl + R	Enable result list.
Down arrow, up arrow, page down key, page up key, home, end	Move up/down the list.
Enter, Alt + Enter	Open an item.
Shift + selection + Enter , Ctrl + selection + Enter	Select multiple entries and open the main data form to edit multiple entries.
F5	Update the result list.

The result list has its own toolbar and context menu.

Table 15: Toolbar features in the Manager

Icon	Function
🗗	Edit. Opens the main data form.
📄	New. Creates a new object.
📄	Delete. Deletes the object.
🗐	Undo delete. Redo delete.
🔃	Reload the data. Reloads the objects.
🔍	Search. Search in result list.
🝖	Filter. Filter result list.
🗄	Export result list.

Table 16: Entries in the result list context menu in the Manager

Context Menu Item	Meaning
New	A new object with the selected object type is added. Already entered insert values are applied.
Delete	The selected object is deleted once the security prompt is confirmed.
Undo delete	After confirming the security prompt, the object is undeleted. This option is only available if the object was marked for deletion.
Open on new tab	The object is opened in a new form in the document view.
Search	The system searches for objects in the navigation.

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One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface   **27**
One Identity Manager tools user interface

Context Menu Item	Meaning
Add to favorites	Adds the selected object to your favorites.
Remove from favorites	Removes the selected object from your favorites.
Show process information	The process view shows the process data for the selected object. For detailed information about the evaluation of process information, see the *One Identity Manager Operational Guide*.
Tasks	The available tasks for the object are displayed and you can run the desired task.
Properties	Show other properties of the active object. This menu item is only available in expert mode.

Related topics

- Expert mode in the Manager on page
- Limiting list sizes using simple filters on page
- Displaying extended properties for objects on page
- Multiple object edit in the Manager on page

Features in the task view

When you select an object, the task view shows the tasks and title of available reports. To run a task or open a report, select an item in the task view. Use the tooltip to show a more detailed description of a task or a report.

Figure 4: Task view in the Manager
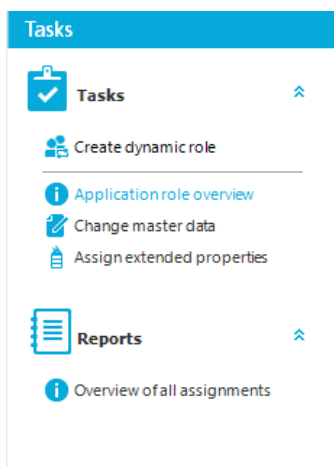
TIP: If tasks are linked to preprocessor-relevant configuration parameters, the preprocessor conditions are shown behind the tasks. To do this, enable the program setting **Show additional navigation information**.

Related topics

- Detailed information about the user interface on page 60

Features in the favorites list

Links to frequently visited objects are stored in the favorites list in the Manager.

Figure 5: Favorites list in the Manager
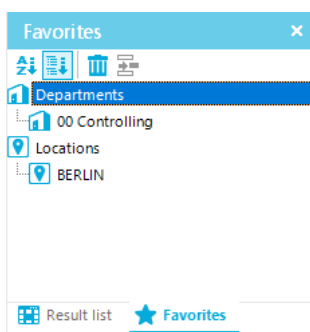
To copy an entry to the favorites in the Manager

- In the Manager, select the entry and select the **Add to favorites** context menu.

To delete an entry from the favorites in the Manager

- In the Manager, select the entry and select the **Remove from favorites** context menu.

The favorites list has its own toolbar and context menu.

Table 17: Meaning of entries in the special toolbar in the Manager

Icon	Meaning
⬇	Sort your favorites alphabetically.
⬇	Sort your favorites by object type.
🗑	Delete all favorites.
⬇	Delete selected favorites.

Table 18: Entries in the context menu of the favorites list in the Manager

Context Menu Item	Meaning
Open on new tab	The object is opened in a new form in the document view.
Search	The system looks for objects in the favorites list.
Remove selected favorites	The selected favorites are removed from the favorites list.
Tasks	A submenu shows all the tasks that are available for the selected object. Select one of the tasks to open the relevant form.
Properties	Show other properties of the active object. This menu item is only available in expert mode.

Related topics

- Displaying extended properties for objects on page 78

Features of the document view

When you select an object in the result list, the first available form is displayed in document view. As a minimum, the following forms are displayed for each editable object:

- Overview form

  This form is used only to display selected data for an object.

ONE IDENTITY by Quest

One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface
One Identity Manager tools user interface

30

- Main data form

  Use this form to change the object data.

Every form has a form tab bar that displays the selected object according to a set display template. For objects that were marked as **pending** during a synchronization, the display template is provided with the [Outstanding] ID.

Every form has a context menu with form-specific entries. In expert mode, you can use the **Properties** entry in the form context menu to view additional object properties and the permissions.

Figure 6: Form in the Manager
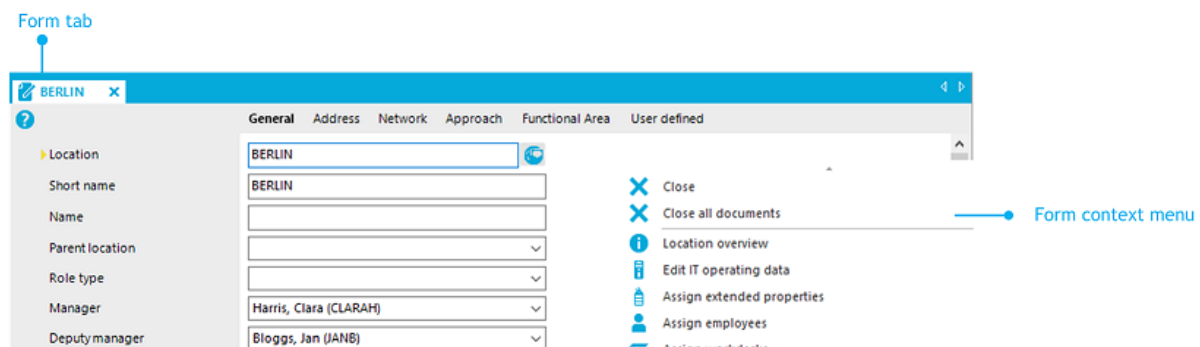
To open the forms for an object:

- When you select an object on the result list, the first form always opens (usually the overview form).
- From the result list, select single objects one after the other to update the opened form in the document view. Only one form is open at a time.
- To open other forms, select the task from the task view or from the form's context menu.

To display multiple forms in the document view:

- Use **Alt + Click** or the **Open on new tab** context menu to open the objects.

  This means that you can quickly switch between objects without having to reload the object from the list again. The forms stay open when you switch between categories.

To close the forms:

- From the menu, select the **View > Close active document** or the **View > Close all documents** menu item.

By default, an object's overview form is displayed first. You can, however, configure the program to show the edit form for the object first, which allows faster editing.

To enable quick edit mode:

- In the Manager, use the ⧉ icon in the result list.

  It is only possible to quick edit the selected object.

- Select the **View > Enable quick edit mode** menu item.

  Restart the program to enable quick edit mode.

- From the **Database > Settings** menu item, select the **Enable quick edit mode** program setting.

  Quick edit mode remains enabled even if you restart the program.

The status bar in the Manager also shows the following information when you open a form:

- The definition of the current object
- The name of the activated form in the following format: `<logical form>
  [(<physical form>)]`

TIP: Double-click the name in the status bar to copy the object definition and the form name to the clipboard.

The forms use different controls and functions.

Related topics

- Detailed information about the user interface on page 60
- Displaying extended properties for objects on page 78

Overview form

Form elements are used to present the information on the overview forms.

Figure 7: Example of elements in an overview form
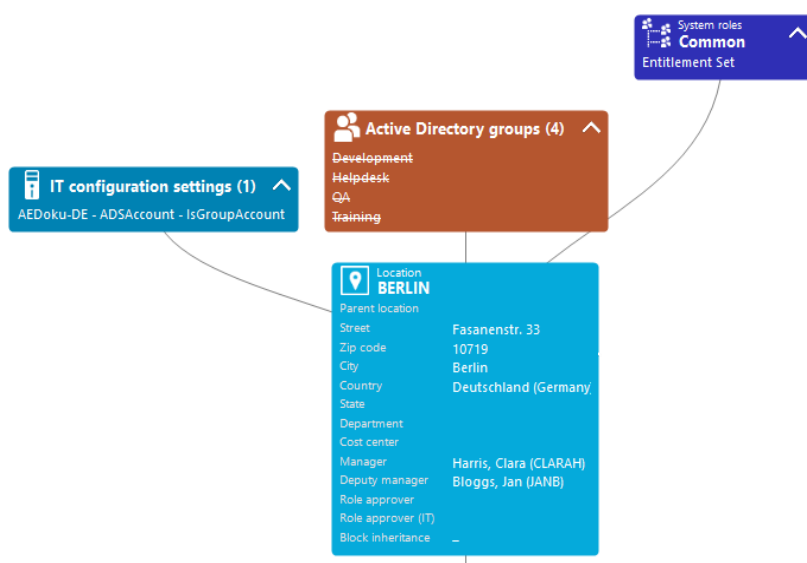
The display text of the menu item, the display text for the objects to be shown and the menu item icon are displayed in the header of a form element. Other data represents the object properties and values. There is a tooltip for each property showing a description for use. Some form element entries are highlighted in color when you click on them with the mouse. Then you can click on the entry to switch to the referenced object.

If the form element is used for mapping lists, the items are displayed with their names. The number of items is shown in the form element header. There is also an icon in the form element header for showing and hiding the items. A tooltip is also shown for the list items.

Table 19: Form element icon

Icon	Meaning
⌄	Show list items.
⌃	Hide list items.

NOTE: Objects marked for deletion and outstanding objects are struck through on the overview form.

Input field

Input fields are used to edit strings, numbers, and dates. A default context menu is available for input fields. Mandatory input fields are marked with a triangle ▶. Whether an input field is required or not depends on the minimum column length defined in the model tables. Other required fields are defined in the customizers.

Figure 8: Input field with required field

▶Last name	Harris

TIP: You can use the **Ctrl + Alt + Enter** key combination to enlarge the input fields for entering multiline texts.

Labeling changed data

Changes to data are labeled with extra icons in front of the modified value. As long as the changes have not been saved, you can undo the changes by clicking on the icon.

Figure 9: Labeling changed data

▶Last name	🔵 Harrison

Table 20: Labeling the input fields when data changes

Icon	Meaning
🔵	Changed value. The value is not yet saved. Click the icon to discard the change.
⚠️	The value will be changed at a specified time. You can change the value only at the specified time.
📅	The value will be changed at a specified time.

For detailed information about planning activation times, see the *One Identity Manager Operational Guide*.

Displaying the column names

The column name is shown for every input field. If the full column name is too long to display, it is shortened with [...]. Use a tooltip to display the full name.

In the Manager, you can display the technical names of the columns in expert mode. in the format `column@table`.

To display the technical names in expert mode in the Manager

- In the Manager, select the **View > Show field definition** menu item.

Related topics

- Expert mode in the Manager on page 20

One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface
One Identity Manager tools user interface

34

Translating entries

For more information about localization in One Identity Manager, see in the *One Identity Manager Configuration Guide*.

If a column is marked as multilingual, an extra button 🌐 is displayed next to the input field.

NOTE:

- The value is always entered in the input field in the specified default language. The value is then translated into the required languages.

- The translations are only used to display a value, for example, in the overview form or in lists. The input fields to be edited still show the value entered in the default language.

- You can edit translations in different places. When you change a translation, all those places are shown. Before changing a translation, check in the Designer about how it is used.

- Users can only edit object and column translations for which they have permissions.

- To edit all translations, users require the **Allow translation of text data regardless of the edit permissions for the base object** program function (Common_Translation).

To translate an entry:
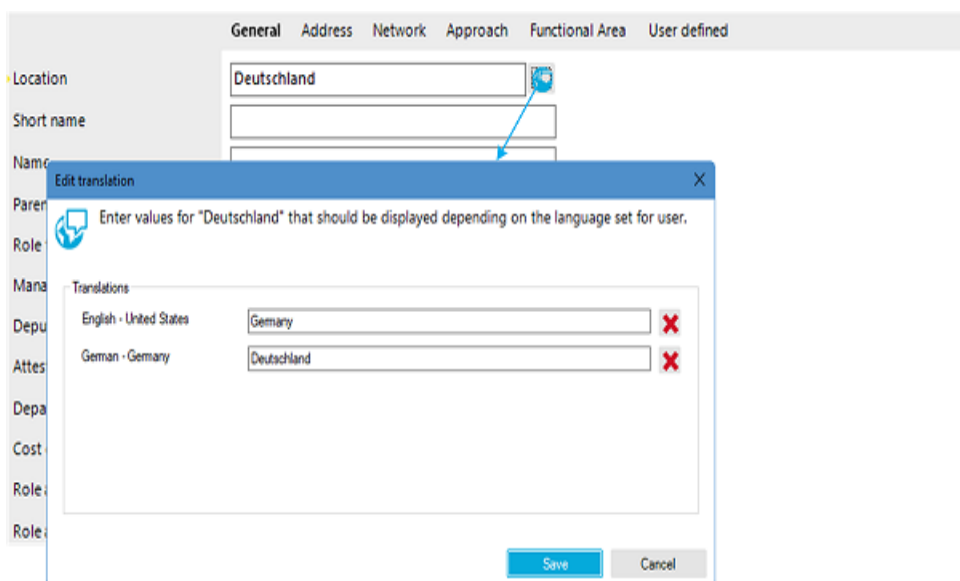
1. Click 🌐 beside the input field to open the dialog window for entering the translations.

2. Use next to the translation field to delete a translation.

   NOTE: You can use the ❌ button beside the translation input to delete a translation.

3. Click **Save**.

Figure 10: Translating entries
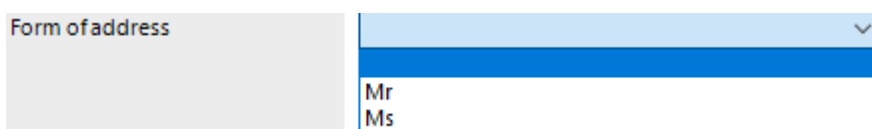
Entering a list of permitted values

If you have the option to set a list of permitted values for a column, the input field looks like this:

- If there is no defined list, enter the value in the simple input field that appears.
- If there is a defined list, select the value from the selection list that appears.

Figure 11: Selecting from a list of permitted values

The control on the default forms in the Manager is only available for the predefined columns and for the user-defined columns (generally **Spare field no. 01**–**Spare field no. 10**).

Entering multiple values

If a column is suitable for entering multiple values, you will see extra icons next to the input field.

Figure 12: Entering multiple values

Office addresses	Gertrud-Caspari-Str. 13	⌄	+	x

Table 21: Icons for entering multiple properties

Icon	Meaning
⊞	Insert data. A separate input form opens.
⊠	Delete data.

Setting values

Use the slider to set a value within a defined range. The value appears next to the slider and can be displayed in full with the tooltip. The color indicates how critical the value is assessed to be.

Figure 13: Slider

Risk index	───────○────────	0,5

Entering scripts

This input field is used in the editors when the input data needs to have a specified syntax (for example SQL, XML, or VB.Net). It has an advanced edit mode that provides additional actions.

To switch to advanced mode

- Press **Ctrl + Alt + Enter** or click the button at the bottom right.

Figure 14: Directly entering a database query
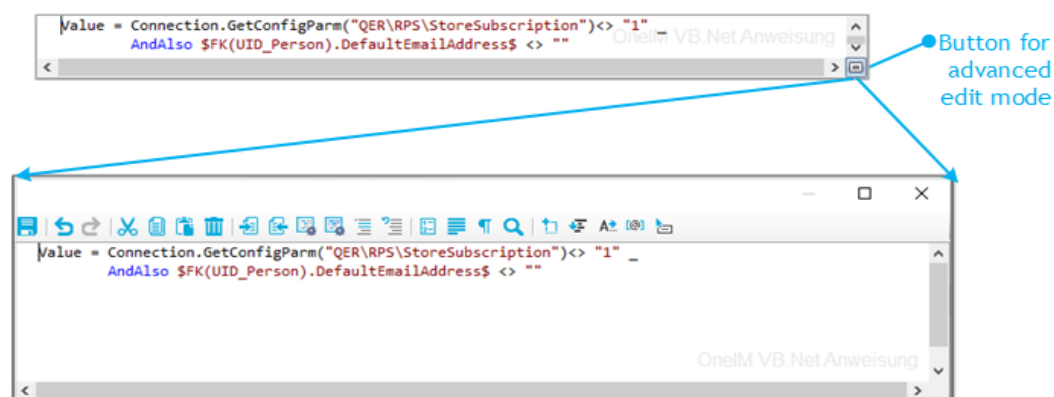
Table 22: Meaning of icon in advanced edit mode

Icon	Meaning
	Quits advanced edit mode.
	Undoes last change.
	Redoes last change.
	Cuts selected code.
	Copies selected code into clipboard.
	Inserts code from clipboard.
	Deletes selected code.
	Decreases insert.
	Increases insert.
	Automatic text formatting.
	Formats text selection automatically.
	Shows/hides line numbers.
	Inserts comments.
	Removes comments.
	Inserts or removes line numbers.
	Inserts or removes automatic line breaks.
	Shows or hides spaces and tabs.
	Searches within code.
	Inserts code snippet.
	Shows list of objects properties.
	Shows auto completion list.
	Shows list with parameter information.
	Shows additional information.

Table 23: Shortcut for editing scripts

Shortcut	Description
Ctrl + C	Copy to clipboard.
Ctl + Ins	Copy to clipboard.
Ctrl + X	Cut and copy to clipboard.

Shortcut	Description
Shift + Del	Cut and copy to clipboard.
Ctrl + L	Cut row and copy to clipboard.
Ctrl + V	Paste from clipboard.
Shift + Ins	Paste from clipboard.
Ctrl + Y	Redo action.
Ctrl + Shift + Z	Redo action.
Ctrl + Z	Undo action.
Backspace	Remove character behind cursor.
Shift + Backspace	Remove character behind cursor.
Ctrl + Backspace	Remove word behind cursor.
Del	Delete character in front of cursor.
Ctrl + Shift + L	Delete row.
Ctrl + Del	Delete to end of next word.
Data	Insert line break.
Shift + Return.	Insert soft line break.
Ctrl + Return	Insert row above.
Ctrl + Shift + Return	Insert row below.
Ctrl + Space	Auto-complete.
Ctrl + Space + Space	Show list with parameter information.
Tab	Insert indent/tab.
Shift + Tab	Remove indent/tab.
Ctrl + U	Change marked characters to lowercase.
Ctrl + Shift + U	Change marked characters to uppercase.
Ins	Toggle insert mode.
Ctrl + T	Swap characters in front and behind cursor.
Ctrl + Shift + T	Swap words in front and behind cursor.
Shift + Alt + T	Swap row with previous row.
Alt + PgUp	Move row up.
Alt + PgDn	Move row down.

Shortcut	Description
PgUp	Move up
PgDn	Move down.
Left arrow	Move left.
Right arrow	Move right.
Ctrl + Left arrow	Move to previous word.
Ctrl + Right arrow	Move to next word.
Home	Move to start of line.
End	Move to end of line.
Ctrl + Home	Move to start of script.
Ctrl + End	Move to end of script.
PgDn	Move up a page.
PgUp	Move down a page.
Ctrl + PgUp	Move to visible start.
Ctrl + PgDn	Move to visible end.
Ctrl +]	Move to next bracket. (not possible on German keyboard)
Ctrl + Down arrow	Scroll down.
Ctrl + Up arrow	Scroll up
Ctrl + F	Open search dialog.
F3	Search next.
Ctrl + F3	Search forward.
Shift + F3	Search backward.
Ctrl + Shift + F3	Find previous.
Ctrl + H	Replace.
Ctrl + I	Search forward incrementally.
Ctrl + Shift + I	Search backward incrementally.
Ctrl + Shift + Num-	Reduce code block selection.
Ctrl + Shift + Num+	Extend code block selection.
Esc	Remove selection.
Shift + Down arrow	Extend selection down.

Shortcut	Description
Shift + Up arrow	Extend selection up.
Shift + Left arrow	Extend selection left.
Shift + Right arrow	Extend selection right.
Ctrl + Shift + Left arrow	Extend selection to previous word.
Ctrl + Shift + Right arrow	Extend selection to next word.
Shift + Home	Extend selection to start of line.
Shift + End	Extend selection to end of line.
Shift + Alt + Home	Extend selection to start of script.
Ctrl + Shift + End	Extend selection to end of script.
Shift + PgUp	Extend selection by one page up.
Shift + PgDn	Extend selection by one page down.
Ctrl + Shift + PgUp	Extend selection to visible start.
Ctrl + Shift + PgDn	Extend selection to visible end.
Ctrl + A	Select all.
Ctrl + Shift + W	Select word.
Ctrl + Shift +]	Select up to the next bracket. (not possible on German keyboard)
Shift + Alt + Down arrow	Extend selected block down.
Shift + Alt + Up arrow	Extend selected block up.
Shift + Alt + Left arrow	Extend selected block left.
Shift + Alt + Right arrow	Extend selected block right.
Ctrl + Shift + Alt + Left arrow	Extend selected block by one word to the left.
Ctrl + Shift + Alt + Right arrow	Extend selected block by one word to the right.
Ctrl + mouse wheel	Adjust text size.

There is additional help provided for creating script code.

Syntax highlighting

The input fields support syntax highlighting depending on the syntax type.

Auto-completion

You can use auto-completion when you write script code. The amount of scripted code to enter is reduced by displaying the names of properties or functions that can be used. To use auto-completion, use the shortcut **Ctrl + SPACE** in the relevant positions within the input fields. The contents of the list is determined by the key words in the code.

Entering code snippets

One Identity Manager provides code snippets for you to use as templates. You can insert code snippets using the following options:

1. Using the ⊕ icon

    a. Select the ⊕ icon.

    b. Select the code snippet.

2. Using a shortcut

    a. Press **F2**.

    b. Select the code snippet.

3. Using an aliases

    a. Enter an alias.

    b. Use **Tab** to insert the code snippet.

        | NOTE: Be aware of case sensitivity when you enter the alias.

NOTE: If you select a code snippet directly using a shortcut or the ⊕ icon, a short description and the shortcut name are displayed in a tooltip.

Inputting values using dollar ($) notation

In input fields where a VB.NET term is expected, a help list opens when you enter **$**. All properties of the current object are displayed. You can also see a tooltip with a detailed description of the property. When you select a foreign key (FK) column, you can navigate to the columns in the relevant table using the arrow keys. To end the selection in the target column, press **Enter** or double-click. The complete $ notation for your selection should now be shown in the input column. To close the help list without copying any data, press **Esc** or leave the input field.

Figure 15: Help list for dollar notation
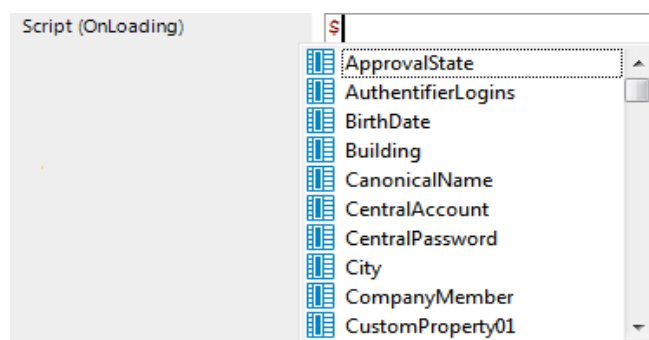
Table 24: Meaning of icons used in the help list for dollar notation.

Icon	Meaning
	Property of current object.
	Primary key (PK).
	Foreign key (FK).
	Dynamic foreign key
	Table
	Special properties
	Script

Table 25: Help list functions for dollar notation

Shortcut	Action
Arrow down key	Opens the help list.
Arrow up key, arrow down key	Navigate to previous or next entry.
Arrow left key, arrow right key	Navigate to the object above or below over the foreign key.
Data	Accepts the value in dollar notation.

Entering database queries

It is sometimes necessary to enter database queries. You can enter the database queries as a SQL query directly or compile the database queries with a wizard. Use the ✎, 🗄 or 🖋 buttons to switch to the appropriate view.

Table 26: Meaning of the icons

Icon	Meaning
	Enter a database query as a SQL query.
	WHERE clause wizard.
	Filter designer.

Detailed information about this topic

- Wizard for entering database queries on page 44
- Filter designer on page 45

Wizard for entering database queries

The wizard helps you to formulate a condition (where clause) for database queries. The complete database query is composed internally. It always refers to the database table, which is preset when the Where clause wizard starts.

Figure 16: WHERE clause wizard.
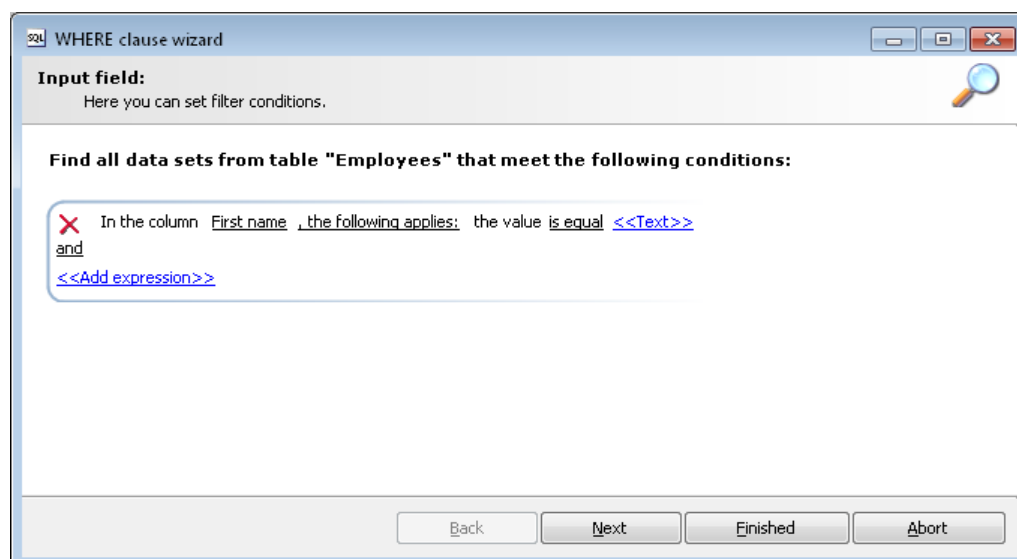
There are predefined operators to make it easier to create conditions. The operators are underlined. Operators with a help entry for the permitted value (such as column selection, data input or free text) are shown in parentheses (<<Operator>>).

To create a database query using the WHERE clause wizard

1. Start the WHERE clause wizard with the 🪄 button.

2. Create the database query.

    - When you hover over an operator, the cursor changes to a hand symbol.

    - If an operator has only two permitted values you can click to switch between the values.

    - Click an operator with more than two permissible values to open a menu listing the permissible operator values.

        Click to select the required entry and then use the button to confirm the selection.

        - OR -

        Double-click an entry to select the value.

    - A selection window opens in which you can select all database columns of the base object and its related objects. Use **SQL name** to switch between the display name and the technical name of tables and columns.

- For complex database queries, you have the option of linking several conditions together. After each condition there is a row showing the logical operator for the connection, followed by another row for the next condition. Use the button in front of a condition to delete it from the query.

- Use the **Expert view** button to switch to direct entry of the query in SQL syntax. Use the **Wizard view** button to switch back to the simple input mode.

3. Click **Continue**.

    The preview shows all the entries that meet the defined condition.

4. Click **Continue**.

    The database query condition is shown in SQL syntax.

5. Click **Finished**.

Filter designer

The filter designer helps you formulate a condition for database queries. The complete database query is composed internally. The database query always references the Person table.

Figure 17: Filter designer

An employee is assigned to a dynamic role when he or she meets all of the following conditions:

For the entitlement with target system type ▾ Active Directory ▾ in the domain AEDoku-DE ▾

, the following applies: Has permissions control ▾ Standard User (Profiles) ▾
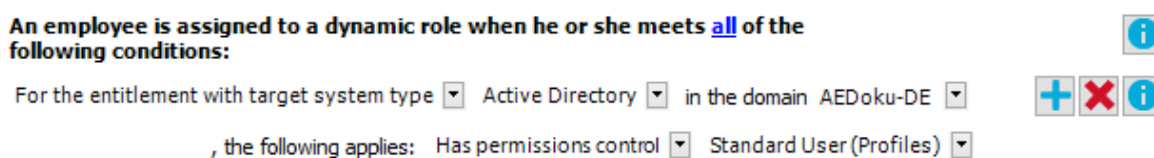
To create a database query using the filter designer

1. Start the wizard by pressing ▧.

2. Using the **all** operator, specify whether at least one or all of the conditions defined below must be fulfilled.

    - When you hover over the operator, the cursor changes to a hand symbol.

    - By clicking the operator, switch between the **all** and **at least one** values.

3. Create the conditions.

    a. In the first menu, specify the condition type.

        Depending on the condition type, other menus are displayed.

    Table 27: Permitted condition types

Condition Type	Meaning
Property	Employee object properties. The drop-down menu with permitted properties is already restricted to the most

Condition Type	Meaning
	important employee properties.
For the account with the target system type	Employee's user account. Valid user account properties depend on which target system is selected.
	You can only select columns that are shown in the Unified Namespace and for which the **Display in the filter designer** option is enabled.
For entitlements with the target system type	Employee target system group. Valid group properties depend on which target system is selected.
	You can only select columns that are shown in the Unified Namespace and for which the **Display in the filter designer** option is enabled.
SQL Query	Free choice of SQL query (WHERE clause). To use the WHERE clause wizard, click 🪄.

b. From the additional menus, select the object attributes for the condition.

All other controls are operators and properties that you require to formulate the condition. You can only select one entry from the drop-down menu. You can select more entries from extended drop-down menus, where the properties are displayed hierarchically and then added to the condition using an "or" operator. You may enter text directly into input fields. Pop-up menus and input fields are shown and hidden dynamically.

c. To insert another condition, click ✚. All partial conditions are linked by an AND link.

d. To delete a condition, click ✖.

e. To the preview window, click ⓘ. All objects determined by the condition are displayed.

Entering custom filter conditions

At certain points you can define custom filter conditions. The filter conditions are formulated like a condition (WHERE clause) for a database query.

You can enter database queries directly or put them together with a wizard. Use the 📄 and 🪄 buttons to switch to the relevant view.

- The comparison operators =, <>, <, >, <=, >=, and like are supported for defining conditions.
- To link condition you can use the logical operators AND, OR, and NOT.
- You can use variables in your condition definitions. Variable must be masked.

    Syntax: '$<variable>$'

NOTE: If the condition contains a dollar sign, which is not labeling a variable, it must be masked with $.

Example: '300 $$' compared to the value '300 $'

TIP: If you enter a condition directly, you can access predefined variables with the ▣ button.

Each condition is displayed in a special control in the wizard. The controls contain connection points to logically join single conditions or delete single conditions. The connection points are set if you mouse over the edge of the respective control.

Figure 18: Wizard for entering filters
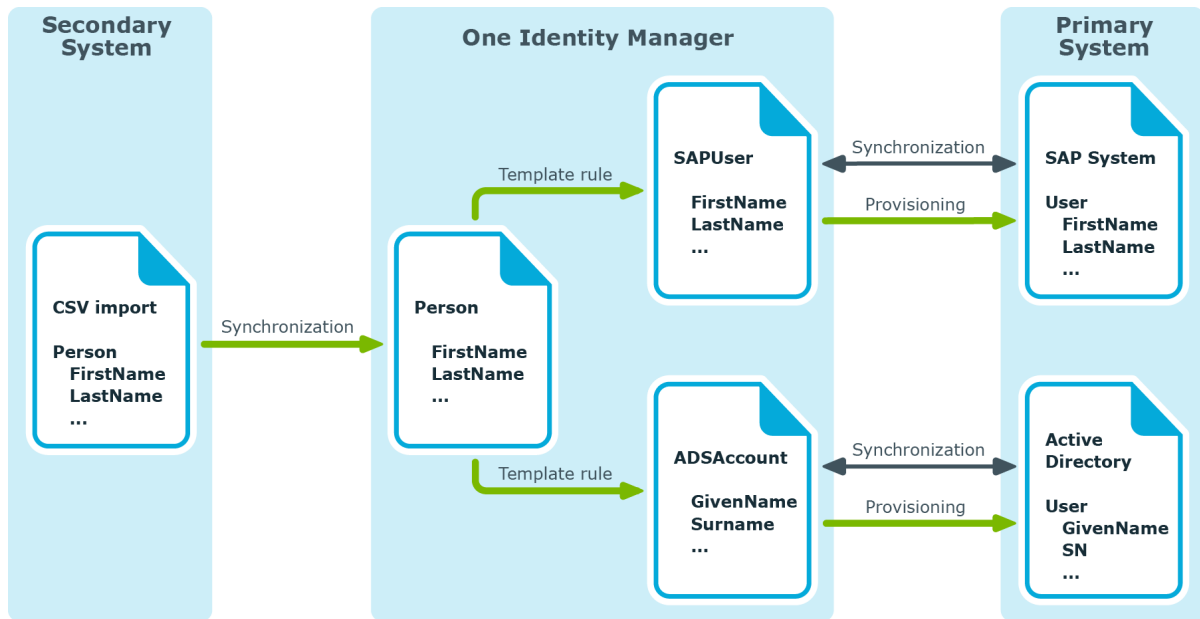
To create a filter with a wizard

1. Click **Create condition**.

   This inserts a control for the first condition.

2. Enter the condition.

   a. Click the left-hand part of the condition and select the property to filter by.

      The properties for filtering are listed in the menu. You can also define other properties and use variables.

   b. Specify the comparison operator. Click the comparison operator to change it.

      The comparison operators =, <>, <, >, <=, >=, and like are supported for defining conditions.

   c. Specify the comparison value on the right-hand side of the condition.

      You can enter a string for a comparison value or select a property from the list. You can also use variables.

ONE IDENTITY by Quest

One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface   **47**
One Identity Manager tools user interface

NOTE: To switch back to the input field again, select **Input** field from the menu.

3. To link condition you can use the logical operators AND, OR, and NOT.

   a. Mouse over the edge of the control to which you wish to create a link.

      The connection points appear.

   b. Mouse over a connection point and select the connection.

      This adds a new control for the next condition.

   NOTE: To remove a control, select the **Delete** connection point.

Selecting from lists

Use the menu to select an element.

NOTE: You can add to some menus, in which case an entry selection appears in the list.

The extended menu links to elements from a different database table. To better display your hierarchical structures, from this menu you can select from hierarchy trees as well as flat structures.

Figure 19: Extended menus
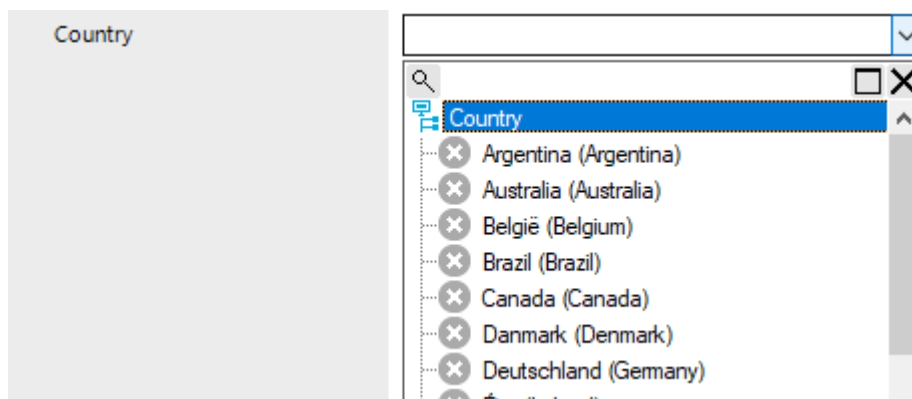
To select a value form an extended menu

1. Open the menu by clicking the arrow.

2. Enable or disable an entry using a single click and close the menu.

   - OR -

   Enable or disable an entry by double-clicking.

   The menu closes automatically.

TIP: As you enter text in the input field, the system filters the selection data for you. When you open the menu you can see the entries that contain the text you entered. If the entered text is unique, you can also select the relevant entry using the **tab**.

To search in the menu

1. Click the magnifying glass in the menu title bar to open the search dialog.

2. Enter your search term.

3. Set the option **Case sensitive** if required.

4. Start the search with the **Search** or **Enter** button.

5. Use **F3** to continue searching.

6. End the search with **Esc**.

Selecting a dynamic entry

Some foreign key relationships are identified dynamically in One Identity Manager. There are two steps to selecting a dynamic foreign key.

1. Specify the table in which the object should be identified.

2. Select the actual object.

Figure 20: Selecting dynamic entries
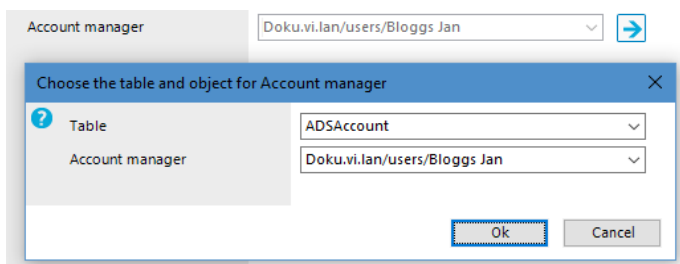
To specify a dynamic entry:

1. Click → next to the field.

2. Under **Table**, select in the table in which to identify the object.

3. Select the actual object from the next list.

4. Click **OK**.

Setting a date

As well as manually entering a date, you can copy a date into the input field from the control. Open the control using the [**...**] button beside a date input field.

Figure 21: Control for setting a date
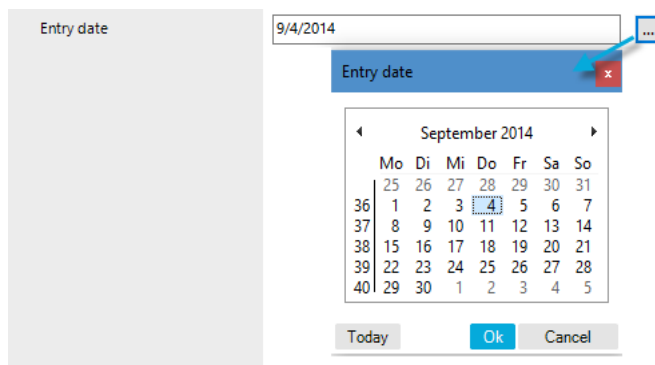
The title bar of the control repeats the name of the corresponding input field.

To select a date:

1. Today's date is identified by a colored border. Click **Today** to select today's date.

   - OR -

   Select the date using the calendar.

   a. Select the month and year using the arrow beside the **Month year** control or click the **Month year** control.

   b. Select the day by clicking in the calendar.

2. Click **OK**.

Editing login hours

This control is used, for example, to configure the daily login hours for a user account.

Figure 22: Login time control
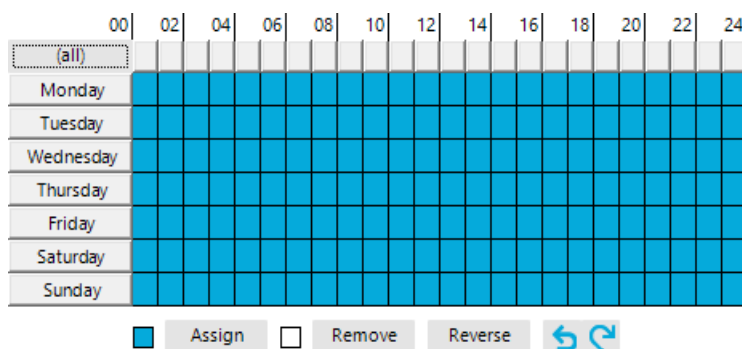
The calendar shows a 7-day week, each box represents one hour. The configured login times are shown in color, respectively. If a box is filled, login is allowed. If the box is empty, login is denied.

To specify login times

- Select a time period with the mouse or keyboard.
- Select **Assign** to enable login in the selected period.
- Select **Remove** to deny login in the selected period.
- Select **Reverse** to invert the selected period.
- Use the arrow keys to reset or repeat a selection.

Layout of object relations

This control element shows the relations between the One Identity Manager database objects (Parent/ChildRelation).

- Only the assigned elements are displayed in the **Remove assignments** pane.

  You can remove assigned elements here.

- In the **Add assignments** pane, you can see all the elements.

  Make new assignments or remove existing ones here. If allowed, you can use a filter to further restrict the selection of elements you want to show.

To activate or deactivate an assignment

- Use the control's context menu.

  - OR -

- Double-click an entry.

Figure 23: Displaying assignments in the control element
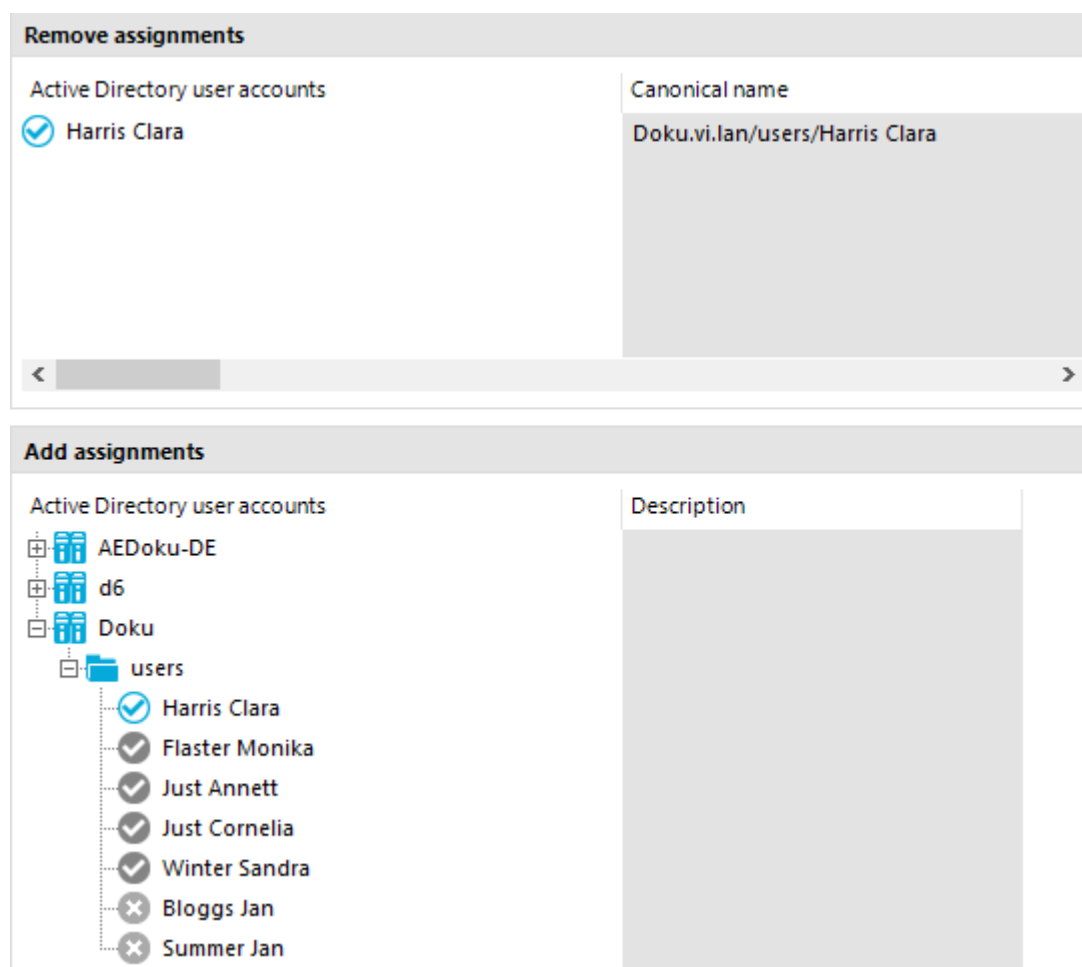
Table 28: Meaning of icons in the control element

Icon	Meaning
⊘	Object is assigned to the selected base object.
⊗	Object is not assigned to an object.
⊘	Object is assigned to another object.

NOTE: In the list, assigned elements come before unassigned elements.

Table 29: Control element context menu items

Entry	Meaning
Assign	Assign object to the selected base object.
Remove	Remove assignment of object to base object.

Entry	Meaning
Assign child objects	In a hierarchical structure, assign the selected object and its child objects to the base object.
Remove child objects	In a hierarchical structure, remove the assignments of the selected object and its child object to the base object.
Assign all objects	Assign all existing objects to the base object.
Remove all assignments	Remove all assignments to the base object.
Search	Opens the search dialog.
Go to object	Go to the selected object.
Go to assigned object	Go to this object's assigned base object.
Show objects already assigned to other objects.	Objects that are assigned to other objects are shown in the **Add assignments** pane.
Hide objects already assigned to other objects.	Objects that are assigned to other objects are hidden in the **Add assignments** pane.

Displaying assignments

The membership tree shows the direct and indirect assignments to a base object. It also shows the source of the indirectly assigned objects. This means that the object was assigned to a base object through a dynamic role, for example, or through inheritance.

- Only the assigned elements are displayed in the **Remove assignments** pane. You can remove the assignments here.

- Under **Add assignments** you can see all the elements.

  Make new assignments or remove existing ones here. If allowed, you can use a filter to further restrict the selection of elements you want to show.

NOTE: Objects marked for deletion and outstanding objects are struck through on the overview form.

To activate or deactivate an assignment

- Use the control's context menu.

  - OR -

- Double-click an entry.

Figure 24: Displaying assignments
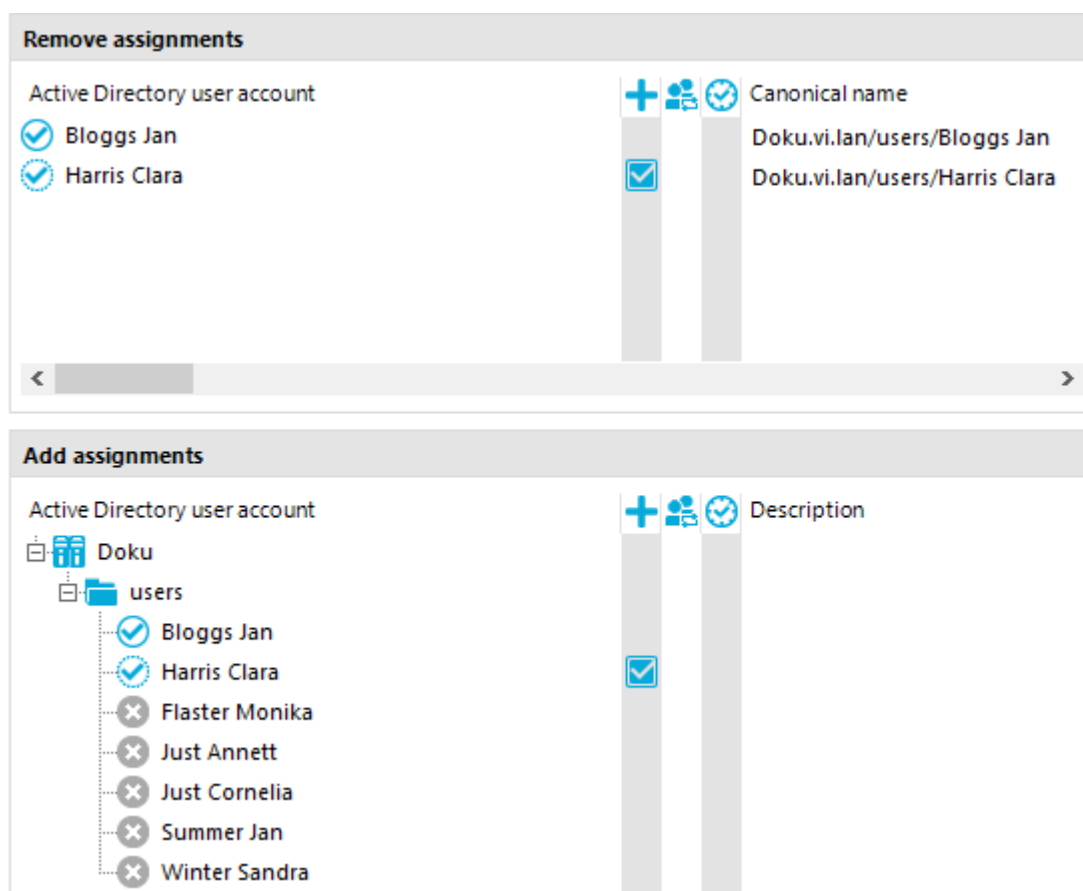
Table 30: Meaning of icons in the membership tree

Icon	Meaning
⊘	Object is assigned directly to the selected base object.
✓	Object is assigned indirectly to the selected base object.
⊘	Object is assigned directly and indirectly to the selected base object.
⊗	Object is not assigned to a base object.
⊠	Inheritance interruption. Only when objects are assigned in hierarchical structures.
✚	Indirect assignment.
🖧	Assignment through dynamic roles.
⊘	Assignment not yet effective. The DBQueue Processor has not yet calculated the assignment.
📅	The change in value is planned for a specific date and time.

NOTE: The list displays assigned elements before unassigned elements.

Table 31: Entries in the membership tree context menu

Entry	Meaning
Assign	Directly assign the selected object to the base object.
Remove	Remove the assignment of the selected object to the base object.
Assign child objects	In a hierarchical structure, assign the selected object and its child objects to the base object.
Remove child objects	In a hierarchical structure, remove the assignments of the selected object and its child object to the base object.
Assign all objects	Directly assign all existing objects to the base object.
Remove all assignments	Remove all direct assignments to the base object.
Search	Opens the search dialog.
Go to object	Go to the selected object.
Extended properties	Switches to the detailed form for the selected object, where you can make additional assignments. A prerequisite for this is that the selected object is assigned and this assignment has been saved.

NOTE: Use the **Search** function to search the entire assignment tree for the occurrence of specific texts. The search sequence does not follow the displayed hierarchical structure of the tree, but instead the internal structures of the control element. As such, the search seems to jump through the tree at random. All records are searched to find the requested object.

General control key combinations

Table 32: General control key combinations

Shortcut	Action
Tab, shift + tab, left arrow key, right arrow key, down arrow, up arrow	Move within the controls.
Down arrow, up arrow, page down key, page up key, home, end	Move in lists and in hierarchical structures.
<+> or right arrow key	Open hierarchy level.
<-> or left arrow key	Close hierarchy level.

Shortcut	Action
Space or Enter	Select an entry.
Shift + Return.	Select multiple entries.
F4 or Alt + down arrow	Open selection list.
Del	Remove entry from the list.

Manager program settings

General configuration settings are specified in the `Manager.exe.config` configuration file. Valid global configuration settings can also be defined through the global configuration file `Global.cfg` in One Identity Manager's own format. The configuration files are stored in the program directory. For more information, see the *One Identity Manager Process Monitoring and Troubleshooting Guide*.

To change the program settings in the Manager

- In the Manager, select the **Database > Settings** menu item.

Detailed information about this topic

User settings in the Manager

On the **User** tab, configure your user-specific program settings. These settings are stored in the One Identity Manager database user configuration.

General

- **Show balloon tips**: Specifies whether speech bubbles, which provide information about program functionality, are shown in the program.
- **Show large images in navigation panes**: Specifies whether smaller or larger icons are displayed on the categories.
- **Show additional icons**: Specifies whether icons are shown in the task list in addition to the descriptions.

- **Use single clicks**: Specifies whether objects are loaded with a single click or by double-clicking.
- **Use technical display values**: Specifies whether display names or technical names are used when collating data exports.

Behavior

- **Enable quick edit mode**: Specifies whether quick editing is enabled.

  By default, an object's overview form is displayed first. You can, however, configure the program to show the edit form for the object first, which allows faster editing. In order to do this quick edit mode has to be enabled. Quick edit mode is indicated by an additional icon in the program's status bar.
- **Enable expert mode**: Specifies whether expert mode is used. Setting this option switches the program from standard view mode to advanced mode.
- **Enable list limit**: Specifies whether the number of elements shown in the result list and list items in controls should be limited.

  If this option is enabled, the number of elements must be entered. To do this, you can choose between the global system settings or the local, personal setting for the user.
- **Use system settings**: Specifies whether the system settings should be used for the list limit.

  If this option is activated, then the global system settings from the **Common | DBConnection | ListLimit** parameter is used. If the number of results is greater than the defined number, a filter dialog opens.
- **Objects**: Personal setting for the object list limit. If the number of results is greater than the defined number, a filter dialog opens.

Usage

- **Form history length**: Number of forms available to browse through in the form history. You find the form history in the menus attached to the <Back> and <Forward> buttons in the main toolbar.
- **Show recently used objects**: Specify whether or not the most recently used objects are displayed. If this option is set, the objects used last are shown in a separate node in the result list.
- **Object type count**: This number specifies how many objects per object type are shown per menu entry when the option **Show recently used objects** is enabled.

After starting

- **Visible root nodes**: The number of categories to be displayed initially in the navigation view. Changes become effective after a restart.

Related topics

Special settings for individual program components in the Manager

On the **Features** tab, you can create special program settings for individual program components. The settings are stored in the One Identity Manager database user account configuration.

Simple search

- **Default search operator**: Search operator to be used by default for simple searches. Permitted values are **starts with**, **contains** or **equals**.

Process information

The settings in the **Process information** area relate to the process view and are visible only when this functionality has been activated. For detailed information about the evaluation of process information, see the *One Identity Manager Operational Guide*.

- **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.
  - **Complete information**: Single steps with a detail depth of **Basic information**, **Supplementary information**, and **Complete 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.

ONE IDENTITY by Quest

One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface **58**
One Identity Manager tools user interface

- **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.

Related topics

- Manager program settings on page 56

General program settings in the Manager

On the **Program** tab, enter the common program settings. These settings are saved in the registry database on the workstation.

Language settings

- **Language**: Language used for formatting data, such as date formats, time formats, and number formats.
- **Other user interface language**:Language for the user interface. The initial program login uses the system language for the user interface. Changes to the language settings take effect after the program has been restarted.The language is set globally for all One Identity Manager programs, which means the language setting does not have to be configured for each program individually.

Miscellaneous

- **Clear local cache**: Click the button to empty the local cache directory %LocalAppData%\One Identity\One Identity Manager\Cache.
- **Show additional navigation information**: If this option is activated, additional information is shown for individual interface components.

    NOTE: The option is not saved permanently. It has to be reset each time the program is started.

Related topics

- Manager program settings on page 56
- Detailed information about the user interface on page 60

Plugins available in the Manager

The **Plugins** tab shows the available program plugins with a short description of their features.

To enable or disable a plugin in the Manager

- Double-click the plugin name.

NOTE: You can choose more plugins in the Manager menu by clicking **Plugins**.

Related topics

- Manager program settings on page 56

Reloading changes to the user interface

In the status bar, the ⟳ icon indicates that the user interface was modified.

To reload modifications to the system data

1. In the status bar, double-click the icon ⟳.

2. Enable the **Restore user interface** option. After loading the modifications, the system then navigates back to the point in the interface that you were previously using.

3. Click **Yes**.

Detailed information about the user interface

You will usually need to display more information about individual interface elements, such as menu entries or forms, only if the program's user interface is edited.

To display detailed information

1. Select the **Database > Settings** menu item.

2. On the **Program** tab, enable the **Show additional navigation information** option.

   NOTE: The option is not saved permanently. It has to be reset when the program is started.

The following information appears:

- Manager shows the form name in the status bar. It displays in the following format:

  `<logical form> [(<physical form>)]`

  TIP: Double-click the form name to copy the name to the clipboard.

- In the Manager, the **Show system data** entry is displayed in the menu bar in the **View** menu. This opens a form that lists detailed information about the loaded menu items, forms, and form definitions.

- In the Manager, in expert mode, the **Definition** context menu entry is displayed in addition in the navigation view. This shows advanced technical information about configuring a menu item.

- If menu entries or tasks are linked to preprocessor-relevant configuration parameters, the preprocessor conditions are shown behind the menu items and tasks.

Related topics

- Expert mode in the Manager on page 20
- Manager program settings on page 56

Limiting list entries using the list limit

Table 33: Configuration parameter for limiting results

Configuration parameter	Effect
Common | DBConnection | ListLimit	This configuration parameter specifies the number of list entries above which the filter request becomes effective
Common | DBConnection | WebListLimit	This configuration parameter specifies the number of list entries above which the filter request in the web front becomes effective.

You can use a list limit to limit the number of elements displayed in a result list and in the control elements with list values (for example, menus). If the number of results exceeds the limit, a filter dialog opens.

In the Designer, you can globally define the maximum number of entries displayed before the filter dialog is opened in the **Common | DBConnection | ListLimit** configuration parameter. In addition, the current user can use the system setting or enter their own limit. The personal limit overwrites the global value in the configuration parameter.

To use the system settings

1. Select the **Database > Settings** menu item.

2. On the **User** tab in the **Behavior** pane, enable the **Enable list limit** and **Use system settings** options.

   This setting applies the global value defined in the **Common | DBConnection | ListLimit** configuration parameter.

ONE IDENTITY
by Quest

One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface **61**
One Identity Manager tools user interface

To use a personal limit

1. Select the **Database > Settings** menu item.

2. On the **User** tab in the **Behavior** pane, enable the **Enable list limit**.

3. On the **User** tab in the **Behavior** pane, disable the **Use system settings** option and enter the number of objects in **Objects**.

Related topics

- Limiting list sizes using simple filters on page 62
- User-defined filters in the Manager on page 64
- Searching for list entries on page 63
- Database search in the Manager on page 70

Limiting list sizes using simple filters

You can use the filter dialog to limit the entries in a list though defined filter criteria. A filter remains in use until you reset it. Settings in the filter dialog are saved in the user configuration.

If you want to start certain search queries more frequently, create search queries for the advanced database search or create user-defined filters.

To limit a result set

1. In **Filter condition**, enter the text to use as a basis for filtering. Use of ***** as wild cards is permitted. Case sensitivity is not taken into account.

2. In **Apply to**, enable the properties to which the filter condition is to be applied.

3. If you only want lists to show objects that meet the filter condition and are already assigned to the base object, enable the **Only show current assignment** option.

    NOTE: This option is only available for lists with object assignments.

4. Click **Apply**.

    NOTE: To display all objects, click **Show all**. The filter condition is not applied in this case.

> **Example:**
>
> This filter condition is used to search for all parts of an employee's full name. This is put together in the following manner:
>
> Full name

Last name, first name

Example:

Miller, Max

Miller-Mayer, Max

Macmiller, Max

Filter condition	Description	Find, according to example
Miller or *Miller*	Finds all employees whose full name contains the string `Miller`.	Miller, Max Miller-Mayer, Max Macmiller, Max
Miller*	Finds all employees whose full name begins with the `Miller`.	Miller, Max Miller-Mayer, Max
*Miller	Finds all employees whose full name ends with the `Miller`.	No entry

Related topics

Searching for list entries

Use the search dialog to search for entries within a list.

To search in a list

1. Open the search dialog from the **Search** context menu, by clicking the 🔍 icon or with the shortcut **Ctrl + F**.

2. Enter the **Search term** or select a previous one from the list using the arrow button.

3. Set the **Case sensitive** option if required.

4. Start the search with the **Search** or **Enter** button.

5. Use **F3** to continue searching.

6. End the search with **Esc**.

ONE IDENTITY
by Quest

One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface **63**
One Identity Manager tools user interface

Table 34: Shortcuts for the search dialog box

Shortcut	Action
Ctrl + F	Open search dialog.
Data	Start search.
Esc	End search.
F3	Search next.

For a wider ranging search, use the database search function.

Related topics

- Database search in the Manager on page 70

User-defined filters in the Manager

You make use of user-defined filters if you wish to run specific search queries frequently. You can create your own (private) filters or public filters.

User-defined filters allow you to run the following searches:

- Searching for a search term with placeholders within the display values of the selected object definition
- Searching entries with a SQL condition
- Searching for a search term across all columns of an object definition that are indexed for the full-text search

Detailed information about this topic

- Creating filter queries using wildcards in the Manager on page 65
- Creating filter queries in the Manager using SQL conditions on page 66
- Creating filter queries using full-text search in the Manager on page 67
- Applying filters in the Manager on page 68
- Publishing filters in the Manager on page 68
- Exporting and importing filters in the Manager on page 68
- Attaching filters in the Manager on page 69
- Editing filters in the Manager on page 70

Creating filter queries using wildcards in the Manager

A search query using placeholders searches for the search pattern in the display values of the selected object definition.

To create a filter query using placeholders in the Manager

1. In the Manager, select the **My One Identity Manager > Filters** category.

2. Select the **New filter** context menu item.

3. In the **Define a filter** dialog, select the **Wildcard** filter method.

4. In the **Filter parameter** pane, enter the following information.

   - **Filter objects of**: Select the object definition in which to perform the search.
   - **Search pattern**: Enter the search pattern. You can use * as a wildcard in the search pattern.

     Examples:

     Pattern* - searches for all entries whose display value starts with the `Pattern` string

     *Pattern - searches for all entries whose display value ends with the `Pattern` string

     Pattern - searches for all entries whose display value contains the `Pattern` string

     Pattern - searches for all entries whose display value matches the `Pattern` string

5. (Optional) If required, specify the following settings in the **Optional parameter** pane.

   - **Sort criteria**: Specify the properties (columns) by which to sort the search result. Click 🔧 to show all available properties according to the object definition. Click on a name to transfer the entry to the input field.
   - **Display template**: Specify the format in which the results are displayed. Click 🔧 to show all available properties according to the object definition. Click on a name to transfer the entry to the input field.

6. In the **Save filter** section, enter a name and description for the search filter.

7. (Optional) To make the filer available to all users

   a. Click **Publish**.

   b. Confirm the security prompt with **Yes**.

8. To save the filter, click **Save**.

Related topics

- Creating filter queries in the Manager using SQL conditions on page 66
- Creating filter queries using full-text search in the Manager on page 67
- Publishing filters in the Manager on page 68

Creating filter queries in the Manager using SQL conditions

A search query with an SQL condition searches all entries of the selected object definition that match the SQL condition.

To create a filter query using a SQL condition in the Manager

1. In the Manager, select the **My One Identity Manager > Filters** category.

2. Select the **New filter** context menu item.

3. In the **Define a filter** dialog, select the **SQL** filter method.

4. In the **Filter parameter** pane, enter the following information.

    - **Filter objects of**: Select the object definition in which to perform the search.

    - **Search pattern**: Enter the condition. Enter the condition as a valid database query WHERE clause. You can enter the database queries as an SQL query directly or compile the database queries with a wizard. Use the **Expert view** or **Simple view** button to switch to the appropriate view.

5. (Optional) If required, specify the following settings in the **Optional parameter** section.

    - **Sort criteria**: Specify the properties (columns) by which to sort the search result. Click ⚒ to show all available properties according to the object definition. Click on a name to transfer the entry to the input field.

    - **Display template**: Specify the format in which the results are displayed. Click ⚒ to show all available properties according to the object definition. Click on a name to transfer the entry to the input field.

6. In the **Save filter** section, enter a name and description for the search filter.

7. (Optional) To make the filer available to all users

    a. Click **Publish**.

    b. Confirm the security prompt with **Yes**.

8. To save the filter, click **Save**.

Related topics

- Creating filter queries using wildcards in the Manager on page 65
- Creating filter queries using full-text search in the Manager on page 67

- Publishing filters in the Manager on page 68

Creating filter queries using full-text search in the Manager

NOTE: To use the full-text search, you must run the program over an application server with an installed search service. For detailed information about installing an application server for full text search, see the *One Identity Manager Installation Guide*.

A search query using full-text search, searches for the specified search term in all columns of the selected object definition that are indexed for full-text search. For detailed information about configuring columns for the full text search, see the *One Identity Manager Configuration Guide*.

To create a filter query in the Manager using the full-text search

1. In the Manager, select the **My One Identity Manager > Filters** category.

2. Select the **New filter** context menu item.

3. In the **Define a filter** dialog, select the **Full text** filter method.

4. In the **Filter parameter** pane, enter the following information.

   - **Filter objects of**: Select the object definition in which to perform the search.

   - **Search string**: Enter the search term. The use of wild cards is permitted. For examples, refer to Rules and examples for the full-text search on page 75.

5. (Optional) If required, specify the following settings in the **Optional parameter** section.

   - **Sort criteria**: Specify the properties (columns) by which to sort the search result. Click to show all available properties according to the object definition. Click on a name to transfer the entry to the input field.

   - **Display template**: Specify the format in which the results are displayed. Click to show all available properties according to the object definition. Click on a name to transfer the entry to the input field.

6. In the **Save filter** section, enter a name and description for the search filter.

7. (Optional) To make the filer available to all users

   a. Click **Publish**.

   b. Confirm the security prompt with **Yes**.

8. To save the filter, click **Save**.

Related topics

- Creating filter queries using wildcards in the Manager on page 65
- Creating filter queries in the Manager using SQL conditions on page 66

ONE IDENTITY by Quest

One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface **67**
One Identity Manager tools user interface

Applying filters in the Manager

To use a filter in the Manager

- In the Manager, select the filter in the **My One Identity Manager > Filters** category.

Related topics

Publishing filters in the Manager

NOTE: To create, edit, and delete public filters, the user requires the **Option to define, modify, and delete public filters.** program function. (`Common_PublicFilterDefine`).

You can make filters available to all users by publishing them. You have the option to publish a filter when you create it. Afterward, you can also publish a private filter.

To publish a filter in the Manager

1. In the Manager, select the filter in the **My One Identity Manager > Filters** category.
2. Select the **Edit filter** context menu item.
3. Click **Publish**.
4. Confirm the security prompt with **Yes**.
5. Click **Save**.

Related topics

Exporting and importing filters in the Manager

To make custom filters available to other users, you can export and import them.

To export a filter in the Manager

1. In the Manager, select the filter in the **My One Identity Manager > Filters** category.

2. Start the export using the **Export filter** context menu.

3. Using the file browser, select the directory path for the report and enter a file name for the filter.

4. Click **Save**.

   The filter file (*.xml) is generated.

To import a filter in the Manager

1. In the Manager, select the **My One Identity Manager > Filters** category.

2. Start the export using the **Import filter** context menu.

3. Select the filter file from the file browser.

4. Click **Open**.

Related topics

- Attaching filters in the Manager on page 69
- Publishing filters in the Manager on page 68

Attaching filters in the Manager

You can attach filters to various categories so you can quickly access the filtered objects.

To attach a filter in the Manager

1. In the Manager, select the filter in the **My One Identity Manager > Filters** category.

2. Select the **Attach** context menu.

3. Select one or multiple menu categories to attach the filter to.

When you select a category with an attached filter in the navigation view, all objects that correspond to the filter are displayed on a separate form page. The following functions are available:

- Double-click an entry on this form page to switch to the corresponding object. The first available form is opened.

- Open the export form using the **Export data** task or click **Export data** on the context menu. The filter condition of the attached filter is already applied as an export condition. For detailed information about exporting data, see the *One Identity Manager Operational Guide*.

ONE IDENTITY by Quest

One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface   **69**
One Identity Manager tools user interface

Editing filters in the Manager

NOTE: To create, edit, and delete public filters, the user requires the **Option to define, modify, and delete public filters.** program function. (Common_PublicFilterDefine).

To edit a filter in the Manager

1. In the Manager, select the filter in the **My One Identity Manager > Filters** category.

2. Select the **Edit filter** context menu item.

3. Edit the filter settings in the **Define a filter** dialog.

4. Click **Save**.

Related topics

- Creating filter queries using wildcards in the Manager on page 65
- Creating filter queries in the Manager using SQL conditions on page 66
- Creating filter queries using full-text search in the Manager on page 67

Deleting filters in the Manager

NOTE: To create, edit, and delete public filters, the user requires the **Option to define, modify, and delete public filters.** program function. (Common_PublicFilterDefine).

To delete a filter in the Manager

1. In the Manager, select the filter in the **My One Identity Manager > Filters** category.

2. Select the **Remove filter** context menu item.

Database search in the Manager

In the Manager, you can run a simple database search or an advanced database search. Run a simple database search once. You cannot save a simple database search. Use an advanced database search if you wish to run specific search queries frequently. You can save the search query.

Detailed information about this topic

- Simple database search on page 71
- Advanced database search on page 72

Simple database search

The simple database search allows you to run the following searches:

- Searching for a search term with placeholders within the display values of the selected object definition
- Searching for a search term across all columns of an object definition that are indexed for the full-text search

Detailed information about this topic

Running simple database searches using wildcards

A search query using placeholders searches for the search pattern in the display values of the selected object definition.

To run a simple database search in the Manager with placeholders

1. In the Manager, select the **View > Database search** menu item.

   The database search is displayed in the navigation view.

2. Enter the following information in the **Search** section.

   a. **Search in**: Select the object definition. All object definitions in the currently selected category are displayed.

   b. **Search text**: Enter the search term. You can use * as a wildcard. Case sensitivity is not taken into account.

   Examples:

   Pattern or pattern* - searches for all entries whose display value starts with the `Pattern` string

   *Pattern - searches for all entries whose display value ends with the `Pattern` string

   Pattern - searches for all entries whose display value contains the `Pattern` string

   c. **Full-text search**: Disable the option.

3. Start the search using the **Search** button.

TIP: Press ⏻ to set the current query as the default for future search queries.

Related topics

-

Running simple database searches using full-text search

NOTE: To use the full-text search, you must run the program over an application server with an installed search service. For detailed information about installing an application server for full text search, see the *One Identity Manager Installation Guide*.

A search query using full-text search, searches for the specified search term in all columns of the selected object definition that are indexed for full-text search. For detailed information about configuring columns for the full text search, see the *One Identity Manager Configuration Guide*.

To run a simple database search in the Manager as a full-text search

1. In the Manager, select the **View > Database search** menu item.

   The database search is displayed in the navigation view.

2. Enter the following information in the **Search** section.

   a. **Search in**: Select the object definition. All object definitions in the currently selected category are displayed.

   b. **Search text**: Enter the search term. The use of wild cards is permitted. For examples, refer to .

   c. **Full-text search**: enable the option.

3. Start the search using the **Search** button.

TIP: Press 📌 to set the current query as the default for future search queries.

Related topics

-

Advanced database search

The advanced database search allows you to run the following searches:

- Searching for a search term with placeholders within the display values of the selected object definition
- Searching entries with a SQL condition
- Searching for a search term across all columns of an object definition that are indexed for the full-text search

TIP: The saved search queries are displayed in the Manager in the **My One Identity Manager > Filters** category. You can run or edit the search queries there or export them for other users.

Detailed information about this topic

Creating search queries using wildcards

A search query using wildcards searches for the search pattern in the display values of the selected object definition.

To create a filter query using wildcards in the Manager

1. In the Manager, select the **View > Database search** menu item.

   The database search is displayed in the navigation view.

2. To open the advanced database search, click the **Advanced** button in the **Search** section.

3. Click **New search** and select the **Wildcard** search method.

4. In the **Search parameter** pane, enter the following information.

   - **Search in**: Select the object definition in which to perform the search.
   - **Search pattern**: Enter the search pattern. You can use * as a wildcard in the search pattern.

     Examples:

     Pattern* - searches for all entries whose display value starts with the `Pattern` string

     *Pattern - searches for all entries whose display value ends with the `Pattern` string

     Pattern - searches for all entries whose display value contains the `Pattern` string

     Pattern - searches for all entries whose display value matches the `Pattern` string

5. (Optional) If required, specify the following settings in the **Optional parameter** pane.

- **Sort criteria**: Specify the properties (columns) by which to sort the search result. Click ⚒ to show all available properties according to the object definition. Click on a name to transfer the entry to the input field.

- **Display template**: Specify the format in which the results are displayed. Click ⚒ to show all available properties according to the object definition. Click on a name to transfer the entry to the input field.

6. To save the search, enter a name and a description for the search filter in the **Save search** pane and click **Save**.

Creating search queries using SQL conditions

A search query with an SQL condition searches all entries of the selected object definition that match the SQL condition.

To create a filter query using an SQL condition in the Manager

1. In the Manager, select the **View > Database search** menu item.

   The database search is displayed in the navigation view.

2. To open the advanced database search, click the **Advanced** button in the **Search** section.

3. Click **New search** and select the **SQL** search method.

4. In the **Search parameter** pane, enter the following information.

   - **Search in**: Select the object definition in which to perform the search.

   - **Search pattern**: Enter the condition. Enter the condition as a valid database query WHERE clause. You can enter the database queries as an SQL query directly or compile the database queries with a wizard. Use the **Expert view** or **Simple view** button to switch to the appropriate view.

5. (Optional) If required, specify the following settings in the **Optional parameter** section.

   - **Sort criteria**: Specify the properties (columns) by which to sort the search result. Click ⚒ to show all available properties according to the object definition. Click on a name to transfer the entry to the input field.

   - **Display template**: Specify the format in which the results are displayed. Click ⚒ to show all available properties according to the object definition. Click on a name to transfer the entry to the input field.

6. To save the search, enter a name and a description for the search filter in the **Save search** section and click **Save**.

ONE IDENTITY
by Quest

One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface **74**
One Identity Manager tools user interface

Creating search queries using full-text search

> NOTE: To use the full-text search, you must run the program over an application server with an installed search service. For detailed information about installing an application server for full text search, see the *One Identity Manager Installation Guide*.

A search query using full-text search, searches for the specified search term in all columns of the selected object definition that are indexed for full-text search. For detailed information about configuring columns for the full text search, see the *One Identity Manager Configuration Guide*.

To create a search query in the Manager using the full-text search

1. In the Manager, select the **View > Database search** menu item.

   The database search is displayed in the navigation view.

2. To open the advanced database search, click the **Advanced** button in the **Search** area.

3. Click **New search** and select the **Full text** search method.

4. In the **Search parameter** pane, enter the following information.

   - **Search in**: Select the object definition in which to perform the search.

   - **Search string**: Enter the search term. The use of wild cards is permitted. For examples, refer to Rules and examples for the full-text search on page 75.

5. (Optional) If required, specify the following settings in the **Optional parameter** area.

   - **Sort criteria**: Specify the properties (columns) by which to sort the search result. Click ✨ to show all available properties according to the object definition. Click on a name to transfer the entry to the input field.

   - **Display template**: Specify the format in which the results are displayed. Click ✨ to show all available properties according to the object definition. Click on a name to transfer the entry to the input field.

6. To save the search, enter a name and a description for the search filter in the **Save search** area and click **Save**.

Rules and examples for the full-text search

Table 35: Rules with examples for searching

Example	Description
John Doe	Finds John Doe but not John Donut.
	Search results must contain all of the separate terms in the query. A logical **AND** is used.
John OR	Finds Jane Doe and John Donut.

Example	Description
Doe	Placing **OR** between the search terms, acts as a logical OR operator. The result of this search contain at least one of the two search terms.
John NOT Doe	Finds John but not John Doe. The results of this search do not contain the term that comes after **NOT**.
J*	Finds John and Joanna. The ***** functions as a wildcard for any number of characters to complete the term.
Do?	Finds Doe but not Donut. The **?** functions as a wildcard for a single character to complete the term.
"John Doe"	Provides results in which the search terms **John** and **Doe** follow one another. Results of this search contain the string in quotes as phrase.
John Doe~	Finds Jon Does but also other similar results. A tilde **~** after the search term indicates that the search should also find similar results. The means that incorrectly spelled terms can be found as well. You can specify the level of similarity by adding a number between **0** and **1** (with decimal point) after the tilde **~**. The higher the number, the more similar the results.

During the search, the search strings are broken down into tokens by the search index in use. The search terms are compared with these tokens.

Use the **Common | Indexing | IndexNonTokenChars** configuration parameter to specify which delimiters are to be used. The configuration parameter can be extended if certain characters in the search text have linking function.

If the **Common | Indexing | IndexUseLegacyAnalyzer** configuration parameter is enabled, alternative tokenizing is performed also. The alternative method of tokenizing is preferable for long tokens. For example, if the string **Department_01** is a token, the partial string **Department** is not considered to be a token.

The following tokens are named.

Table 36: Tokens for alternative tokenizing

Token	Description with example
Words	Sequence of letters and/or numbers
Enumeration	Words linked by punctuation marks (**_-/.,**) of which at least every second one contains a number. An example is **Department_01**. Sequences are also decimal numbers and IP addresses.
Email	An email address is often made up of first name, last name, company

Token	Description with example
addresses	name and generic top-level domain (for example **.com**). The order or spelling of the first and last names may vary (for example, use of initials). The special character @ and the punctuation mark (.) not only separate each part of the email address but also links them so that
	Examples of email addresses are **Ben.King@example.com** and **C.Harris@example.com**.
Host names	For example **website.example.com**.
Acronym	For example **U. S. A.**
Apostrophe	For example **O'Reilly**.
@, & surrounded by letters	For example **Me&you**.
Umlauts such as ä, ö, ü	For example **Max Müller**.

NOTE: Changing the configuration parameter means rebuilding the search index, which may take some time.

Running advanced database searches

To run an advanced database search in the Manager

1. In the Manager, select the **View > Database search** menu item.

   The database search is displayed in the navigation view.

2. To open the advanced database search, click the **Advanced** button in the **Search** section.

3. Double-click the search filter in the **Saved filters** area.

4. Start the search using the **Search** button.

TIP: The saved search queries are shown in the **My One Identity Manager > Filters** category. You can run or edit the search queries there or export them for other users.

Related topics

- User-defined filters in the Manager on page 64

Displaying extended properties for objects

| NOTE: The Manager must be running in expert mode to show object properties.

To show extended object properties

- Select the object and open the **Properties** item in the context menu.

  - On **General**, you can see the object's general properties, for example, ID, status, or primary key.

    | TIP: The primary key can be copied in different formats. To do this, click the **Primary key** or the **Table relations** caption.

  - All the object columns are displayed in a grid on **Properties** with their values. You can choose between a simple column view and the advanced view with additional data for column definitions.

    Individual properties can be highlighted with an icon.

    To customize the display properties

    - On the **Properties** tab, select the ▣ **Property pages** icon and set the required display properties.

  - On the **Permissions** tab, based on the permissions groups, you see what permissions apply to an object. The first entry shows the basic permissions for the table. The permissions for this particular object are displayed beneath that. The other entries show the column permissions.

    | TIP: Double-click the table entry, the object entry, or a column entry to display the permissions group from which the permissions were determined.

    Table 37: Icon used for permissions

Icon	Meaning
✓	Permissions exist.
●	Permissions have been removed by the object layer
☑	Permissions limited by conditions.

  - 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. For more information about working with change labels, see the *One Identity Manager Operational Guide*.

  - On the **Export** tab, you can export the object in the One Identity Manager-internal transfer format.

Related topics

- Expert mode in the Manager on page 20

Multiple object edit in the Manager

It is possible to edit more than one object of the same object type at the same time in the Manager. The form tab of the main data form shows the number of selected objects and the object type. Input fields with different values are labeled with the 🖹 icon. When you edit an input field and save your changes, the change applies to all open objects.
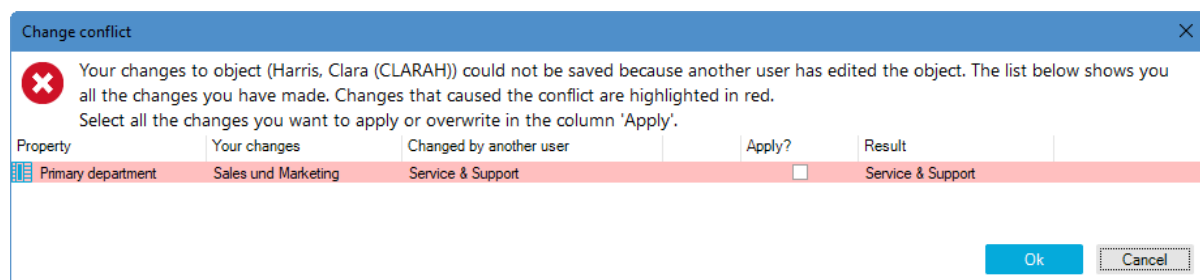
To edit multiple objects at the same time:

1. Use **Shift + selection** or **Ctrl + selection** to select the objects in the result list.
2. Open the main data form either with **Enter**, clicking the 🔲 icon in the result list, or selecting **Tasks > Edit main data** in the context menu.

Committing data on change conflicts

If two users change the same object at the same time, this can cause conflicts when the object is saved, especially if the same property is changed. In this case, a dialog box appears when you save the object. You can use this dialog box to view and apply the changes.

All changes to the object that caused a conflict are shown.

Figure 25: Display of change conflicts

To apply your changes:

- Active the check box in the **Apply** column for your values that you wish to save.

Table 38: About change conflicts

Column	Description
Property	Property of the object that triggered a change conflict.
Your change	Value of the property you entered and wish to save.
Change made by other user	Value of the property that had already been saved by the other user.
Apply?	Specify if your value should be applied. To apply your value, select the check box. Otherwise the system keeps the value saved by the other user.
Result	Current property value. If you activate the check box in the **Apply** column, the value you entered is displayed.

Working with the Designer

The interfaces of the Manager and Designer have a similar layout. You can find detailed information about the basic features under One Identity Manager tools user interface on page 9.

The Designer provides various editors for the One Identity Manager system configuration. The functionality and the mode of operation of the editors depends on the different configuration requirements. When you select an object in the Designer, the available editors are displayed together with the tasks that can be run in the task view.

General tips for the Designer

During the startup process the Designer fills an internal database. SQLite is used for the database system. This internal database contains the schema and the files from the system components of the connected One Identity Manager database.

Depending on the program's configuration, the internal database is either loaded into main memory or copied to the hard drive of the workstation. To avoid data inconsistencies, only one instance of the program should be started per database. If the database from the first instance is copied to hard disk then the databases for all other instances are loaded into main memory.

All changes to objects in the program are made in the internal database. Permissions, formatting rules and side-effects of the Customizer are taken into consideration. Changes made by the user are recorded in a change log. If the internal database is stored on the hard drive, all additional changes are also logged to this database. This means that you can restore to the last working state after connecting to the database if the program crashes.

When the data is transferred all recorded changes are made to the One Identity Manager database. This is done at object level so that, for example, processes are generated and formatting rules are observed. The principle "last writer wins" applies here as opposed to the previous object processing. That means that changes have been made by a user to object properties in the mean time are overwritten.

Depending on the program settings, the internal database is deleted from the hard drive when the program has finished. This means that all the data has to be loaded from the One Identity Manager database when the program is restarted. If the internal database is not

deleted when the program finishes, the next program start up can be accelerated because only changes from the One Identity Manager that is connected have to be loaded.

Menu items in the Designer

Table 39: Meaning of items in the menu bar

Menu	Menu item	Meaning	Shortcut
Database	New connection	Establishes a database connection.	Ctrl + Shift + N
	Save to database	Displays the change log. Changes to the data can be saved to the One Identity Manager database.	Ctrl + Shift + S
	Reload data	Data is reloaded from the One Identity Manager database.	
	Compile database	Starts the Database Compiler. For detailed information about compiling the database, see the *One Identity Manager Operational Guide*.	Ctrl + Shift+ B
	Change management	Opens a dialog box for editing change labels. For detailed information about working with change labels, see the *One Identity Manager Operational Guide*.	
	Check data consistency	Opens the Consistency Editor. For detailed information on checking data consistency, see the *One Identity Manager Operational Guide*.	
	Start SQL editor	Starts the SQL editor.	
	Change password	Changes current user's password.	
	Settings	For configuring program settings.	
	Exit	Exits the program.	Alt + F4

Menu	Menu item	Meaning	Shortcut
View	Navigation	Activates the navigation view.	Ctrl + Q
	Tasks	Shows or hides the task view.	Ctrl + T
	Error log	Shows or hides the error log.	Ctrl + E
	Object import	Shows or hides the view for importing objects.	Ctrl + I
	Search	Shows or hides the search dialog box.	Ctrl + Shift +F
	Close current document	Closes the current document.	
	Close all documents	Closes all documents that are open in the document view.	
	Activate document	Shows all open documents in a selection list.	
	Layout	Restores the default layout of the program's graphical interface. You can save layouts and load them again.	
	Enable quick edit mode	The quick edit mode is enabled or disabled.	
Help	Community	Opens the One Identity Manager community website.	
	Support portal	Opens the One Identity Manager product support website.	
	Training	Opens the One Identity Manager training portal website.	
	Online documentation	Opens the One Identity Manager documentation website.	
	Search	Opens the search dialog box.	
	Help for the Designer	Opens program help. NOTE: Specific help information is available for each editor.	F1
	transport history	Display a chronological list of migration, imports, and exports of transport packages.	
	Info	Shows the version information for program.	

Table 40: Functions in the standard toolbar

Icon	Meaning
🖫	Saves changes to the One Identity Manager database.
←	Shows the previous object in the order that the forms were viewed (object history).
→	Shows next object in the order they have already been viewed (object history).
❓	Database column help. Clicking on the help icon changes the cursor into the help icon. Then when you click on a column description, tips for using the column are displayed in the form of tooltips.
🖨	Prints the edit view. Printer settings are configured in the configuration menus.

Using the help in the Designer

You can access One Identity Manager documentation in the Designer by selecting the **Help > Search in local help** menu item.

You can open the general help for Designer from the **Help** menu or by selecting **F1**. The **Help** menu offers specific help information for each editor.

In addition, a Designer help is available for individual properties of the currently displayed object. Clicking on the help icon ❓ changes the cursor into the help icon. Then when you click on a column description, tips for using the column are displayed in the form of tooltips.

Views in the Designer

The following views are displayed in the Designer: There are several editors used for editing data. Their functionality and methods are tailored to the different configuration tasks.

Table 41: Designer views

View	Description
Navigation view	The navigation structure of the user interface is hierarchical and allows users to drill down to the selection of an object definition. The top level of the hierarchy is used to classify One Identity Manager data into specified categories.
Document view	Overview forms and selected editors are displayed in the document view. When an object is selected in the navigation view, the corresponding

View	Description
	overview form is displayed. TIP: If quick edit is enabled, you skip the overview and go straight to the first editor available for the object.
Task view	When you select an object in the navigation view, the available editors are displayed together with the tasks that can be run. The relevant editor is opened in the document view when the object is selected.
Change log	Changes made by the user are recorded in the change log.
Error log	The program's error log displays all warnings and error messages that have occurred since the program started up. When the Designer restarts, the error log is reinstalled. For detailed information about the error log, see the *One Identity Manager Process Monitoring and Troubleshooting Guide*.
Change label	In this view, change labels are created and edited. For detailed information about working with change labels, see the *One Identity Manager Operational Guide*.

Related topics

Designer program settings

General configuration settings are specified in a configuration file `Designer.exe.config`. Valid global configuration settings can also be defined through the global configuration file `Global.cfg` in One Identity Manager's own format. The configuration files are stored in the program directory. For detailed information, see the *One Identity Manager Process Monitoring and Troubleshooting Guide*.

To change the program settings in the Designer

- In the Designer, select the **Database > Settings** menu item.

Related topics

User settings in the Designer

On the **User** tab, configure your user-specific program settings. These settings are stored in the One Identity Manager database user configuration.

General

- **Show balloon tips**: Specifies whether speech bubbles, which provide information about program functionality, are shown in the program.

- **Show large images in navigation panes**: Specifies whether smaller or larger icons are displayed on the categories.

- **Show additional icons**: Specifies whether icons are shown in the task list in addition to the descriptions.

- **Use single clicks**: Specifies whether objects are loaded with a single click or by double-clicking.

- **Show additional navigation information**: If this option is activated, additional information is shown for individual interface components.

  NOTE: The option is not saved permanently. It has to be reset each time the program is started.

After starting

- **Visible root nodes**: The number of categories to be displayed initially in the navigation view. Changes become effective after a restart.

Behavior

- **Enable quick edit mode**: Specifies whether quick editing is enabled.

  By default, an object's overview form is displayed first. You can, however, configure the program to show the edit form for the object first, which allows faster editing. In order to do this quick edit mode has to be enabled. Quick edit mode is indicated by an additional icon in the program's status bar.

- **Show "Getting Started"**: Specifies whether the **Getting Started** category is shown or hidden.

- **Show system data**: Specifies whether comprehensive system information such as system tables, script occurrences, preprocessor dependencies are shown.

- **Enable list limit**: Specifies whether the number of elements shown in the result list and list items in controls should be limited.

  If this option is enabled, the number of elements must be entered. To do this, you can choose between the global system settings or the local, personal setting for the user.

- **Use system settings**: Specifies whether the system settings should be used for the list limit.

  If this option is activated, then the global system settings from the **Common | DBConnection | ListLimit** configuration parameter are used. If the number of results is greater than the defined number, a filter dialog opens.

- **Objects**: Personal setting for the object list limit. If the number of results is greater than the defined number, a filter dialog opens.

Usage

- **Form history length**: Number of forms available to browse through in the form history. You find the form history in the menus attached to the <Back> and <Forward> buttons in the main toolbar.

- **Entries in the search history**: Number of entries available in the search history.

Related topics

-

General program settings in the Designer

On the **Program** tab, enter the common program settings. These settings are saved in the registry database on the workstation.

Language settings

- **Language**: Language used for formatting data, such as date formats, time formats, and number formats.

- **Other user interface language**:Language for the user interface. The initial program login uses the system language for the user interface. Changes to the language settings take effect after the program has been restarted.The language is set globally for all One Identity Manager programs, which means the language setting does not have to be configured for each program individually.

Designer database settings

- **Load all system data at program startup**: Set the loading behavior for system data.

  If this option is not enable, only the tables that are absolutely necessary are loaded when the Designer starts. The rest of the table are loaded in background and the user can already start using the program. The progress of the filling procedure is shown in the program's status bar.

If this option is enabled, all tables are loaded when the program starts. The user cannot start using the program until all the tables have been loaded. The changes take effect once the Designer has restarted.

- **Load BLOB fields from database on program start**: If this option is not enabled, the contents of binary fields are only loaded when they are required.

  If the option is enable, this data is already loaded at program startup. The means that program startup takes longer.

  The changes take effect once the Designer has restarted.

- **Save databases locally**: If this option is enabled, the internal database is not deleted when the program ends. This accelerates restarting the program the next time since only the changes connected with the One Identity Manager database need to be reloaded.

  If the option is not enabled the internal database is deleted from the hard disk when the program ends. This means that all the data has to be loaded from the One Identity Manager database when the program is restarted.

- **Use RAM to store the system data (no crash recovery)**: If this option is not enabled, the internal database is saved on the workstation hard disk.

  If the option is enabled, the internal database is loaded into the workstation's RAM. In this case the database cannot be restore if the program crashes.

  The changes take effect once the Designer has restarted.

- **Database directory**: If the **Save database locally** option is enabled, the internal database is stored in the `%LocalAppData%\One Identity\One Identity Manager\Designer\Cache` directory. You save the database somewhere else by selecting another database directory.

- **Clear local cache**: Click the button to empty the local cache directory `%LocalAppData%\One Identity\One Identity Manager\Cache`.

Related topics

Logging and committing objects in the Designer

All changed objects in the Designer are created in the internal database. Permissions, formatting rules and side-effects of the Customizer are taken into consideration. Changes made by the user are also recorded in a change log.

To display change data in the Designer

- In the Designer, select the **Database > Commit to database** menu item.

The entries in the change log are grouped by editor. Actions (add, change, and delete) that have been run and changes to the object's properties with old and new values are displayed in the log.

Table 42: Icons in the change log

Icon	Description
	Adds the object.
	Deletes the object.
	The object has been changed.

The following functions are available in the change log:

- Enable and disable individual changes

  You can disable individual changes in the change log. These changes are not transferred to the One Identity Manager database when the data is saved. You can however, re-enable changes at a later date. You can enable or disable each change using the corresponding icon in the change log toolbar.

- Define change label

  It is also possible to create a group of all the changes in the change log, under one label.

  - Before saving the recorded changes in the change log, select the required change label in the **Change label** menu.

  - To assign individual changes to different change labels, use the **Special change label** context menu entry in the change log.

  When the changes are transferred to the One Identity Manager database, the change label is applied to the relevant changes. For more information about working with change labels, see the *One Identity Manager Operational Guide*.

- Saves changes

  All changes are saved to the One Identity Manager database as specified. This is done at object level so that, for example, processes are generated and formatting rules are observed. The principle "last writer wins" applies here as opposed to the previous object processing. That means that changes made by a user to object properties in the mean time are overwritten.

Table 43: Functions in the change log toolbar

Icon	Description
	Enables change/section.

Icon	Description
🗐	Ignores change/section.
📌	Edit a change label.
📍	Specifies a default change label. This change label is used for all subsequent changes.

Related topics

- General tips for the Designer on page 81
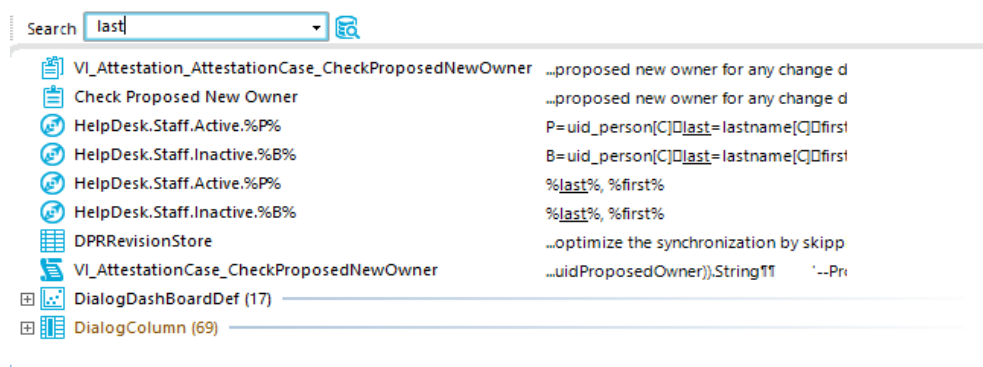
Designer-internal full text search

Use full-text search to look for entries within the internal Designer database. You will find the full text search on its own menu bar in the Designer.

To search for a term

- Enter your search term in the **Search** field.

  You can enter more than one partial terms. You can use * as a wildcard. Case sensitivity is not taken into account. Entries are searched for that contain all the partial terms given.

The objects found are entered in a list as you enter the search term.

Figure 26: Displaying the source

Search	last	▾ 🔍
🗐	VI_Attestation_AttestationCase_CheckProposedNewOwner	...proposed new owner for any change d
📋	Check Proposed New Owner	...proposed new owner for any change d
🌐	HelpDesk.Staff.Active.%P%	P=uid_person[C]□last=lastname[C]□first
🌐	HelpDesk.Staff.Inactive.%B%	B=uid_person[C]□last=lastname[C]□first
🌐	HelpDesk.Staff.Active.%P%	%last%, %first%
🌐	HelpDesk.Staff.Inactive.%B%	%last%, %first%
▦	DPRRevisionStore	...optimize the synchronization by skipp
🗐	VI_AttestationCase_CheckProposedNewOwner	...uidProposedOwner)).String¶¶ '--Pr
⊞ 🗐	DialogDashBoardDef (17)	
⊞ 🗐	DialogColumn (69)	

- The icon to the left of the entry shows the entry's object type (table),e.g. a process, a table or a menu item.

- The source that the object is extracted from is shown to the right of the entry. The search term is highlighted by an underline.

- Database tables, object relations and the exact source are also displayed in a tooltip.

- Double-click an entry to switch to the corresponding object.

If no entries are found for a search term, the system makes suggestions that you can use as search terms by double-clicking.

Figure 27: Suggestions for search terms
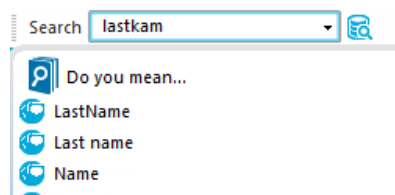
If you have selected an entry, the search term is added to the search history and is therefore available for further searches.

- Open the search history with the arrow in the **search** field.
- When you select an entry, all available sources are shown.

The number of entries in the search history depends on your program settings.

Figure 28: Search history
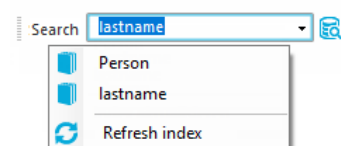
TIP: Update the full text catalog of the Designer database if you need to include objects in the search that have been edited after the program started, like new processes or column names. You do this with **Update index**, in the search history.

User-defined filters in the Designer

It is possible to limit the number of list entries in certain the Designer editors by using a filter. After creating a filter, the filter conditions are immediately implemented on the set of result currently displayed. A filter remains in use until you reset it.

The main components of a user filter are:

- A search in the objects' display values
- A customized search condition (where clause)
- A full text search

You have the option to set up ad-hoc filters and permanent filters. Ad hoc filters are used for a one-off reduction of list entries. These filters are not saved and are applied to the data immediately.

Create a permanent filter if you want to reuse certain search queries on a frequent basis. Permanent filters are saved in the user configuration and therefore are always available for use.

Detailed information about this topic

Using Adhoc filters in the Designer

Ad hoc filters are used for a one-off reduction of list entries. These filters are not saved and are applied to the data immediately. The WHERE clause wizard helps you formulate a condition for database queries. The complete database query is composed internally.

To use an ad-hoc filter in the Designer

1. In the Designer, select the **Filter > Define filter** menu item.
2. In the Where Clause Wizard, create the filter condition.

IMPORTANT: Enter the condition for limiting the result set in SQLite notation. The condition is defined as a valid where clause for database queries. The condition relates to the selected database table found that is determined when the editor starts.

Related topics

Creating filter queries using wildcards in the Designer

The system searches for the search term in the display values of the selected object definition, using the wildcards.

To create a filter query using placeholders in the Designer

1. In the Designer, select the **Filter > Manage filters** menu**.**
2. Click **New filter**.
3. In the **Define a filter** dialog, select the **Wildcard** filter method.
4. In the **Filter parameter** pane, enter the following information.

- **Filter objects of**: The object definition for the list is already selected.

- **Search pattern**: Enter the search pattern. You can use * as a wildcard in the search pattern.

  Examples:

  Pattern* - searches for all entries whose display value starts with the `Pattern` string

  *Pattern - searches for all entries whose display value ends with the `Pattern` string

  Pattern - searches for all entries whose display value contains the `Pattern` string

  Pattern - searches for all entries whose display value matches the `Pattern` string

5. To save the filter, enter a name and a description for the search filter in the **Save filter** pane and click **Save**.

6. (Optional) To make the filer available to all users

   a. Click **Publish**.

   b. Confirm the security prompt with **Yes**.

7. (Optional) To apply the filter immediately, click **Filter**.

8. Select the **Database > Save to database** and click **Save**.

Related topics

Creating filter queries in the Designer using SQL conditions

A condition is used to filter all entries that match the specified condition according to the selected object definition.

To create a filter query using a SQL condition in the Designer

1. In the Designer, select the **Filter > Manage filters** menu**.**

2. Click **New filter**.

3. In the **Define a filter** dialog, select the **SQL** filter method.

4. In the **Filter parameter** pane, enter the following information.

- **Filter objects of**: The object definition for the list is already selected.

- **Search pattern**: Enter the condition. Enter the condition as a valid database query WHERE clause. You can enter the database queries as a SQL query directly or compile the database queries with a wizard. Use the **Expert view** and **Simple view** button to switch to the appropriate view.

5. To save the filter, enter a name and a description for the search filter in the **Save filter** pane and click **Save**.

6. (Optional) To make the filer available to all users

   a. Click **Publish**.

   b. Confirm the security prompt with **Yes**.

7. (Optional) To apply the filter immediately, click **Filter**.

8. Select the **Database > Save to database** and click **Save**.

Related topics

Creating filter queries using full-text search in the Designer

NOTE: To use the full-text search, you must run the program over an application server with an installed search service. For detailed information about installing an application server for full text search, see the *One Identity Manager Installation Guide*.

A search query using full-text search, searches for the specified search term in all columns of the selected object definition that are indexed for full-text search. For detailed information about configuring columns for the full text search, see the *One Identity Manager Configuration Guide*.

To create a filter query in the Designer using the full-text search

1. In the Designer, select the **Filter > Manage filters** menu**.**

2. Click **New filter**.

3. In the **Define a filter** dialog, select the **Full text** filter method.

4. In the **Filter parameter** pane, enter the following information.

- **Filter objects of**: The object definition for the list is already selected.
- **Search string**: Enter the search term. The use of wild cards is permitted. For examples, refer to Rules and examples for the full-text search on page 75.

5. In the **Save filter** pane, enter a name and a description for the search filter and click **Save**.

6. (Optional) To make the filer available to all users

   a. Click **Publish**.

   b. Confirm the security prompt with **Yes**.

7. (Optional) To apply the filter immediately, click **Filter**.

8. Select the **Database > Save to database** and click **Save**.

Related topics

Applying filters in the Designer

To use a saved filter in the Designer

1. In the Designer, select the **Filter > Manage filters** menu**.**

2. Double-click the search filter in the **Saved filters** pane.

3. Click **Filter**.

Related topics

Publishing filters in the Designer

NOTE: To create, edit, and delete public filters, the user requires the **Option to define, modify, and delete public filters.** program function. (`Common_PublicFilterDefine`).

You can make filters available to all users by publishing them. You have the option to publish a filter when you create it. Afterward, you can also publish a private filter.

To publish a filter in the Designer

1. In the Designer, select the **Filter > Manage filters** menu**.**

2. Double-click the search filter in the **Saved filters** area.

3. Click **Publish**.

4. Confirm the security prompt with **Yes**.

5. Select the **Database > Save to database** and click **Save**.

Related topics

- Creating filter queries using wildcards in the Designer on page 92
- Creating filter queries in the Designer using SQL conditions on page 93
- Applying filters in the Designer on page 95

The editors in the Designer

The Designer provides various editors for the One Identity Manager system configuration. The functionality and the mode of operation of the editors depends on the different configuration requirements. When you select an object in the navigation view, the available editors are displayed together with the tasks that can be run.

Table 44: Designer editors

Editor	Description
Object Editor	The Object Editor is provided for editing single objects. All properties of an object are represented in table form and can be edited depending on the permissions situation. In addition, properties such as edit permissions and column definitions are shown. For more information, see Working with the Object Editor on page 98.
List Editor	The List Editor is used to display result lists and to quickly edit objects and object relations. Object properties are displayed in tabular form but there is no additional information about each property as in the Object Editor. For more information, see Working with the List Editor on page 99.
SQL Editor	You can use the SQL Editor to run database queries against the internal Designer's SQLite database. For more information, see Working with the SQL Editor on page 103.
User & Permissions Group Editor	Use the User & Permissions Group Editor to create and edit permissions groups and the system user. For more information, see the *One Identity Manager Authorization and Authentication Guide*.
User Interface	Use the User Interface Editor to edit the navigation of the One Identity Manager tools. For more information, see the *One Identity Manager*

Editor	Description
Editor	*Configuration Guide*.
Form Editor	Use the Form Editor to create and edit the interface forms, such as the main data forms or assignment forms. For more information, see the *One Identity Manager Configuration Guide*.
Overview Form Editor	Use the Overview Form Editor to create overview forms. For more information, see the *One Identity Manager Configuration Guide*.
Permissions Editor	Use the Permissions Editor to edit the permissions structure of the permissions groups and system user. For more information, see the *One Identity Manager Authorization and Authentication Guide*.
Process Editor	The Process Editor is the tool that you use to define and change processes in One Identity Manager. For more information, see the *One Identity Manager Configuration Guide*.
Job Server Editor	You use the Job Server Editor to edit the Job server attributes and the One Identity Manager Service configuration file. For more information, see the *One Identity Manager Configuration Guide*.
Language Editor	For the translation of captions, use the Language Editor. For more information, see the *One Identity Manager Configuration Guide*.
Schema Editor	The Schema Editor displays an overview of the entire One Identity Manager database model. Schema Editor is used to customize table and column definitions to suit the customer. For example, you can define formatting rules or formatting scripts with the Schema Editor. For more information, see the *One Identity Manager Configuration Guide*.
Configuration Parameter Editor	The Configuration Parameter Editor provides an overview of all the configuration parameters in the One Identity Manager and their current values. For more information, see the *One Identity Manager Configuration Guide*.
Script Editor	Use the Script Editor to create, edit, and test the custom scripts. For more information, see the *One Identity Manager Configuration Guide*.
Consistency Editor	Use the Consistency Editor to analyze database object for data consistency. A number of tests are offered to test the database and if necessary run a repair. For more information, see the *One Identity Manager Operational Guide*.
Mail Template Editor	Use the Mail Template Editor to create and edit mail templates. For more information, see the *One Identity Manager Operational Guide*.

Working with the Object Editor

The Object Editor is provided for editing single objects. All properties of an object are represented in table form and can be edited depending on the permissions situation. In addition, properties such as edit permissions and column definitions are shown.

Detailed information about this topic

Object Editor menu items

When the editor starts, the following menu items are available in the Designer.

Table 45: Menu items added by the editor

Menu	Menu item	Meaning
Object	New	Creates a new object.
	Save	Saves all changes to an object.
	Delete	Deletes current object.
	Discard	Returns object to previous state.
	Reload object	Updates the object view.
Options	Group view	The object properties are displayed as groups.
	Column names	Column display text is shown. If the option is not enabled, the technical names according to the One Identity Manager schema are shown.
	Primary key	Shows or hides the primary key.
	Extended	Shows or hides the extended column properties.
Help	Object Editor help	Opens the editor help.

Table 46: Meaning of toolbar icons

Icon	Meaning
	The object properties are displayed as groups.
	Displays caption/technical name depending on the One Identity Manager schema.
	Shows/Hides primary keys.
	Shows/hides the extended column properties.
	Creates object.
	Saves changes.
	Deletes object.
	Resets object to previous state (lose changes).
	Updates object view.

Multiple object edit in the Object Editor

It is possible to edit more than one object of the same object type at the same time in the Object Editor.

1. Use **Shift + select** or **Ctrl + select** to select the entries in the result list.

2. Open the editor from the task view,

The task name contains the number of selected objects. Input fields that have different values are marked in color. The values entered and saved in the fields are stored for all objects.

Working with the List Editor

The List Editor is used to display result lists and to quickly edit objects and object relations. Object properties are displayed in tabular form but there is no additional information about each property as in the Object Editor.

Detailed information about this topic

- List Editor menu items on page 100
- Functions in the List Editor result list on page 100
- Configuring columns for List Editor result lists on page 101
- Multiple editing of list entries in the List Editor on page 102
- Displaying object relations in the List Editor on page 102

List Editor menu items

When the editor starts, the following menu items are available in the Designer.

Table 47: Menu items added by the editor

Menu	Menu item	Meaning
Object	New	Creates a new object.
	Delete	Deletes current object.
	Reload object	Updates the object view.
Filter	Define filter	Opens a dialog window for creating an ad hoc filter.
	Delete filter	Deletes the filter.
	Manage filters	Opens a dialog window for creating permanent filters.
View	Properties	Shows or hides the edit view
	Select columns…	Opens a dialog window for selecting columns to be displayed in the list.
	Select table relations	Opens a dialog box for selecting object relation to view.
Help	List Editor help	Opens the editor help.

Table 48: Meaning of toolbar icons

Icon	Meaning
	Creates object.
	Deletes object.
	Copies object to the clipboard.
	Paste the object or relation from the clipboard. Next to the icon there is a menu to select the type from.
	Updates object view.
	User-defined filter for displaying objects.
	Resets custom filter.

Functions in the List Editor result list

The entries in the result list of the List Editor are displayed with a valid name tag. If an object is selected in the result list, the object properties and object relations are shown in

the edit view. You can limit the number of entries in the result list by setting a filter. For this you can use an ad hoc filter or a permanent filter.

Table 49: Entries in the result list context menu

Context Menu Item	Meaning
New	Inserts a new object.
Delete	Deletes selected object.
Copy	Copies the selected object into the clipboard.
Paste	Inserts the copied object from the clipboard.
Properties	Displays the object properties of the selected entry.
Select columns...	Opens a dialog window for selecting columns to be displayed in the list.
Navigation	Shows all other editors that can be used with the selected object.

TIP:

- In the table header for the result list, click on a column to sort it by the selected column.
- You can display further object properties in the result list.

Related topics

- Configuring columns for List Editor result lists on page 101

Configuring columns for List Editor result lists

To display object properties

1. In the Designer, select the **View > Select column** menu item.
2. You specify which object properties should be additionally shown in which order in the result list. You can also enter the column width and alignment of the column description.
3. Click **OK**.

Table 50: Meaning of toolbar icons

Icon	Meaning
☑	Inserts column in view.
☐	Removes column from view.
↑	Moves column up.
↓	Moves column down.
A↓	Specifies how columns are labeled. If selected the column names are displayed. If this option is not active, the identifiers from the data model are shown.
▣	The column display is reset to the default settings.

Multiple editing of list entries in the List Editor

It is possible to edit more than one object of the same object type at the same time in the List Editor.

- Use **Shift + select** or **Ctrl + select** to select the entries in the result list.

Entries in the list that have different input are specially labeled in the edit view. The values entered and saved in the fields are stored for all objects.

Displaying object relations in the List Editor

To display object relations

1. Select the **View > Select table relations** menu item.

2. You can specify which object relations are displayed in the List Editor.

   Table 51: Entries in the dialog's context menu

Context menu item	Meaning
Show relation	The editing window for the object relationship is displayed in the editing view of the editor.
Hide relation	The editing window for the object relationship is hidden in the editing view of the editor.

3. Click **OK**.

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One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface

Working with the Designer

102

Each relation is shown in its own edit window. To change the assignments, double-click the icon or choose the required option from the context menu.

Table 52: Meaning of icons in the view

Icon	Meaning
⊘	Object is assigned to the selected base object.
⊘	Object is not assigned to all selected base objects (multiple entry editing).
⊗	Object is not assigned to an object.

Table 53: Items in the view's context menu

Context Menu Item	Meaning
Assign	Assign object to the selected base object.
Remove	Remove assignment of object to base object.
Properties	Displays the object properties of the selected entry.
Navigation	Shows all other editors that can be used with the selected object.

Working with the SQL Editor

You can use the SQL Editor to run database queries against the internal Designer's SQLite database. This internal database contains the schema and the files from the system components of the connected One Identity Manager database.

NOTE: To use the SQL Editor in the Designer, the user requires the program function **Option to call the SQL editor in Designer to run SQL statements in the SQL database** (Designer_SQLEditor).

Detailed information about this topic

- SQL Editor menu items on page 103
- Running database queries in SQL Editor on page 105

SQL Editor menu items

When the editor starts, the following menu items are available in the Designer.

Table 54: Menu items added by the editor

Menu	Menu item	Meaning
Edit	Undo	Restores state before last change.
	Redo	Restores state after last change.
	Cut	Deletes marked code but save in clipboard.
	Copy	Copies selected code to the clipboard.
	Paste	Inserts data stored in the clipboard from copy or cut.
	Delete	Deletes selected code.
	Reduce text indent	Reduces the indent of the selected code in the query window.
	Increase text indent	Increases the indent of the selected code in the query window.
SQL	Run (F5)	Runs the query.
	Show as table	Switches output between text and table.
Help	SQL Editor help	Opens the editor help.

Table 55: Meaning of toolbar icons

Icon	Meaning
↩	Undoes last change.
↪	Redoes last change.
✂	Cuts selected code.
📄	Copies selected code into clipboard.
📋	Inserts code from clipboard.
🗑	Deletes selected code.
⮕	Reduces the indent of the selected code in the query window.
⮕	Increases the indent of the selected code in the query window.
☰	Switches output between text and table.
▶	Runs the query.

Running database queries in SQL Editor

To run a database query

- Start the SQL Editor in the Designer by selecting the **Database > Run SQL Editor** menu item.

- Enter your database query in SQLite notation in the query window. The editor supports highlighting.

- Run the database query using **F5**.

  The result are displayed in the results window.

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

  TIP: Use **Ctrl + C** to copy the individual entries or lines to the clipboard. Select **Shift + Select** or **Ctrl + select** to select multiple lines in the table.

About us

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

Index

A

application server

    search index 67, 94

C

consistency icons 25

control

    accessibility

        $ notation 37

        auto-completion 37

        syntax highlighting 37

    assignments 53

    column name 34

    database query 43

        wizard 44-45

    date 49

    dynamic foreign key 49

    field definition 34

    filter 46

    form elements 32

    input field 33

    list of permitted values 36

    login times 50

    menu 48

    multiple value property 36

    object relations 51

    script 37

    shortcut 55

    slider 37

    translate data 35

D

Designer 81

    change log 88

    database search 90

    editors 96

    empty cache 85

    filter 91

        adhoc 92

        apply 95

        full text search 94

        publish 95

        run 95

        SQL condition 93

        wild card 92

    full text search

        run 94

    help 84

    program setting 85

    save changes 88

    SQLite 81

F

filter

    Designer 91

    Manager 64

    wizard 46

filter designer 45

form

    form context menu 30

P

process monitoring

    process information

        configure display 58

S

SQL Editor 103

    database query 105

SQLite 81

U

user

    authentication module 13

    change password 13

    dynamic 13

    logged in 13

    permissions group 13

    program function 13

    read permissions 13

    system user 13

ONE IDENTITY
by Quest

One Identity Manager 8.2 User Guide for One Identity Manager Tools
User Interface

109

Index