



NetIQ® Identity Manager E-Mail Notification Guide

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About this Book and the Library

The *E-Mail Notification Guide* explains how to configure your Identity Manager system to send e-mail notifications to administrators and users when certain events occur.

Intended Audience

This book provides information for Identity Manager administrators, partners, and consultants.

Other Information in the Library

For more information about the library for Identity Manager, see the [Identity Manager documentation website](https://www.netiq.com/documentation/identity-manager-49/) (<https://www.netiq.com/documentation/identity-manager-49/>).

1 Overview

NetIQ Identity Manager includes the ability to send e-mail notifications to designated recipients whenever certain actions occur. The following sections provide the conceptual information needed to understand and complete the tasks associated with using e-mail notifications.

- ♦ [“System E-Mail Notifications” on page 7](#)
- ♦ [“Custom E-Mail Notifications” on page 7](#)
- ♦ [“Default Notification Collection” on page 8](#)

System E-Mail Notifications

Identity Manager includes functionality, such as password management, jobs, and workflow provisioning, that can utilize e-mail messages to notify administrators or users of actions or results that have taken place. For example, e-mail messages can be sent to:

- ♦ Notify a user who has reset his or her password that the action failed.
- ♦ Provide a password to a user who has used the Forgotten Password feature to request the password.
- ♦ Notify you, or another administrator, of the results of an Identity Manager job that has just run.
- ♦ Inform a manager, or another approver, that a provisioning request awaits his or her approval.

In order to customize these e-mail messages to provide information specific to the action that has taken place, Identity Manager uses a set of predefined e-mail notification templates. For example, there is an e-mail template for when a user forgets his or her password, and another template for when a manager needs to approve a user’s request for access to a resource.

In most cases, the system functionality (password management, jobs, and so forth) must be configured to use e-mail notifications, and the text in the e-mail templates must be modified to fit your environment and need. Instructions are provided in [Chapter 3, “Editing Predefined Templates,” on page 13](#).

Custom E-Mail Notifications

Identity Manager enables you to send e-mail notifications through actions you define in policies. For example, if you use the Active Directory driver to create Microsoft Exchange mailboxes for users in Active Directory, you can include an action in the Active Directory driver policy that sends an e-mail to the user when his or her mailbox has been created.

Policies include two e-mail notification actions: **Send Email** and **Send Email from Template**. The **Send Email** action includes the e-mail information in the action while the **Send Email from Template** action references a custom e-mail notification template that you create. For information about creating templates, see [Chapter 4, “Creating Templates,” on page 19](#),

Default Notification Collection

The Default Notification Collection is an Identity Vault object that contains a set of e-mail notification templates and an SMTP server that is used when sending e-mails generated from the templates.

The predefined e-mail notification templates are included in the Default Notification Collection. Any custom templates that you create are also added to the collection. You must define the SMTP server that you want associated with the collection. For more information, see [Chapter 2, “Designating an E-Mail Server,”](#) on page 9.

2 Designating an E-Mail Server

Before you can use any of the e-mail notification templates included in the Default Notification Collection, you must associate an SMTP server with the collection. Whenever an e-mail is generated from one of the collection's templates, the SMTP server is used to send the e-mail.

- ♦ [“Designating an E-Mail Server in Designer” on page 9](#)
- ♦ [“Designating an E-Mail Server in Identity Console” on page 10](#)

Designating an E-Mail Server in Designer

- 1 Open your project.
- 2 In the Outline view, locate the **Default Notification Collection** under the Identity Vault.
- 3 Right-click the collection, then select **Properties** to display the E-Mail Notification Server page.

The screenshot shows a Windows-style dialog box titled "Properties for Default Notification Collection". It has two tabs: "E-Mail Notification Ser" (selected) and "E-Mail Notification Server". The main area contains the following fields and options:

- Host Name: [Text Field]
- From: [Text Field] (with a tooltip example: admin@novell.com)
- Time Out Value(Seconds): [Text Field]
- ☐ Do you want to enable SSL ?
- ☐ Authenticate to the server by using credentials
- User Name: [Text Field]
- Password: [Text Field]
- Retype Password: [Text Field]

At the bottom right, there are "OK" and "Cancel" buttons.

- 4 Fill in the following fields to define the SMTP e-mail server.

Host Name: The hostname/IP address of your SMTP e-mail server. You can also specify a port along with the hostname/IP address using the following syntax:

<server_url>:<port>

From: When a user opens the e-mail, the text that you enter in the **From** edit box is displayed in the **From** field of the user's e-mail heading. Depending on your mail server settings, the text in this field might need to match a valid sender in the system (for example, `helpdesk@company.com`) instead of descriptive text such as The Password Administrator. Such a match allows the mail server to do reverse lookups or authentication.

Time Out Value: Specify the time out value in seconds.

Do you want to enable SSL: Use this option to enable SSL.

Authenticate to the server by using credentials: Use this option for a secured SMTP server.

If your server requires authentication before sending e-mail, specify the username and password here.

Although the authentication information is specified here, you might also need to specify it separately for the application that is sending the notification e-mails.

For example, Forgotten Password e-mail notifications can be sent by using the authentication information you specify here. However, notification e-mails for Identity Manager Password Synchronization require the authentication information to be provided in the driver policy that is used to send notification e-mails.

- 5 Click **OK**.

Designating an E-Mail Server in Identity Console

- 1 On the Identity Console home page, click **Email Server Configuration**.
- 2 On the Email Server Options page, specify the values for your email notification server.
 - ♦ **Host Name:** Specify the hostname or IP address of your SMTP server along with the port number. Use colon (:) to separate the hostname or IP address and port.
For example, `smtp.example.com:587`
 - ♦ **From:** Specify the sender's email address. The email server performs reverse lookups or authentication using this value.
 - ♦ **Time Out Value:** The timeout option allows you to set the time limit (in seconds) to send notification emails.
 - ♦ **Enable SSL:** Select to enable SSL, if required.

- 3 (Conditional) If your server requires basic authentication before sending emails, select **Authentication Required** as Basic Authentication and provide your username and password.

Although the authentication information is specified here, you might also need to specify it separately for the application that is sending the notification e-mails.

For example, Forgotten Password e-mail notifications can be sent by using the authentication information you specify here. However, notification e-mails for Identity Manager Password Synchronization require the authentication information to be provided in the driver policy that is used to send notification e-mails.

- 4 (Conditional) If your server requires modern authentication before sending email, select **Authentication Required** as Modern Authentication and provide values for the following parameters:

NOTE: You must register the Identity Console application with Azure AD to get the values for these parameters. For more information about how to register your application, see [Azure AD portal for registering applications \(https://learn.microsoft.com/en-us/entra/identity-platform/quickstart-register-app\)](https://learn.microsoft.com/en-us/entra/identity-platform/quickstart-register-app).

- ♦ **User Id:** Specifies the account required for server authentication.
- ♦ **Tenant Id:** Specifies the Global Unique Identifier (GUID) for your registered account on Azure Active Directory. Also referred to as the Tenant (Directory) ID.
- ♦ **Client Id:** Specifies the unique ID assigned by Azure Active Directory to your Identity Manager. Also referred to as the Application (client) ID.
- ♦ **Client Secret** Specifies a secret string that Identity Manager uses to prove its identity when requesting an access token. This encrypted value is unique for your application.
- ♦ **Scope:** Specify the scope of the server.
- ♦ **Request Url:** Specifies the request URI of your email server, to which Identity Manager sends authentication requests containing the client secret, scope, grant type, and auth mechanism in the payload.
For example, `https://login.microsoftonline.com/<tenantID>/oauth2/v2.0/token`
- ♦ **Grant type:** Used by Identity Console to obtain an access token to access their own resources, not on behalf of a user. The Grant Type parameter is set to `client_credentials` by default and cannot be modified.
- ♦ **Auth mechanism:** Specifies the format used by the application to encode and transmit the access token to the authentication server. The access token authenticates a user's Outlook account. By default, Auth Mechanism is set to `XOAUTH2` and cannot be modified.

5 Click **Save**.

3 Editing Predefined Templates

Identity Manager includes predefined templates that are used with the password management, jobs, and workflow provisioning functionality. In most cases, you need to change the templates to reflect your environment. For example, several of the templates include example contact information that you should correct for your organization.

The following sections provide information about editing the predefined templates:

- ♦ [“List of Predefined Templates” on page 13](#)
- ♦ [“Editing a Template in Designer” on page 15](#)
- ♦ [“Editing a Template in Identity Console” on page 16](#)

List of Predefined Templates

The predefined templates are listed according to the Identity Manager functionality with which they are used:

- ♦ [“Forgotten Password” on page 13](#)
- ♦ [“Password Synchronization” on page 13](#)
- ♦ [“Workflow Provisioning” on page 14](#)
- ♦ [“Jobs” on page 14](#)

Forgotten Password

The following templates are used with the Forgotten Password functionality in the User Application.

Table 3-1 *Forgotten Password Templates*

Template Name	Description
Forgot Hint	Provide a hint to a user who has forgotten a password.
Forgot Password	Provide a password to a user who has forgotten a password.

Password Synchronization

The following templates are used with the Password Synchronization functionality available for the Identity Manager drivers. For more information, see [“Configuring Password Flow”](#) in the *NetIQ Identity Manager Password Management Guide*.

Table 3-2 Password Synchronization Templates

Template Name	Description
Password Reset Fail	Notification that a reset password does not meet password policy requirements, so the reset password was not accepted.
Password Set Fail	Notification that a password cannot be set in a connected system.
Password Sync Fail	Notification that a password failed to synchronize.

Workflow Provisioning

The following templates are used with the Workflow Provisioning functionality in the User Application. For more information, see “[Managing Provisioning Workflows](#)” in the *NetIQ Identity Manager - Administrator’s Guide to the Identity Applications*.

Table 3-3 Workflow Provisioning Templates

Template Name	Description
Attestation Completed Notification	Notification that the workflow process for an attestation request is completed.
Attestation Notification	Notification that new compliance activity is submitted that requires attention.
Availability	Notification that an availability setting has been created or modified.
Delegate	Notification that a delegate assignment has been created or modified
Provisioning Approval Completed Notification	Notification that a workflow is completed. Indicates the overall workflow and provisioning decision.
Provisioning Notification	Notification to user or manager for approval. Indicates that action is required from the user or manager.
Provisioning Notification Activity	Notification to a user or manager about the activity of the provisioning notification.
Provisioning Reminder	Notification to a user that an activity timeout is about to occur. Reminds the user or manager to act.
Proxy	Notification that a proxy assignment has been created or modified.
Role Request Approval Completed Notification	Notification that the approval process is completed.
Role Request Notification	Notification that a new role request requires approval.

Jobs

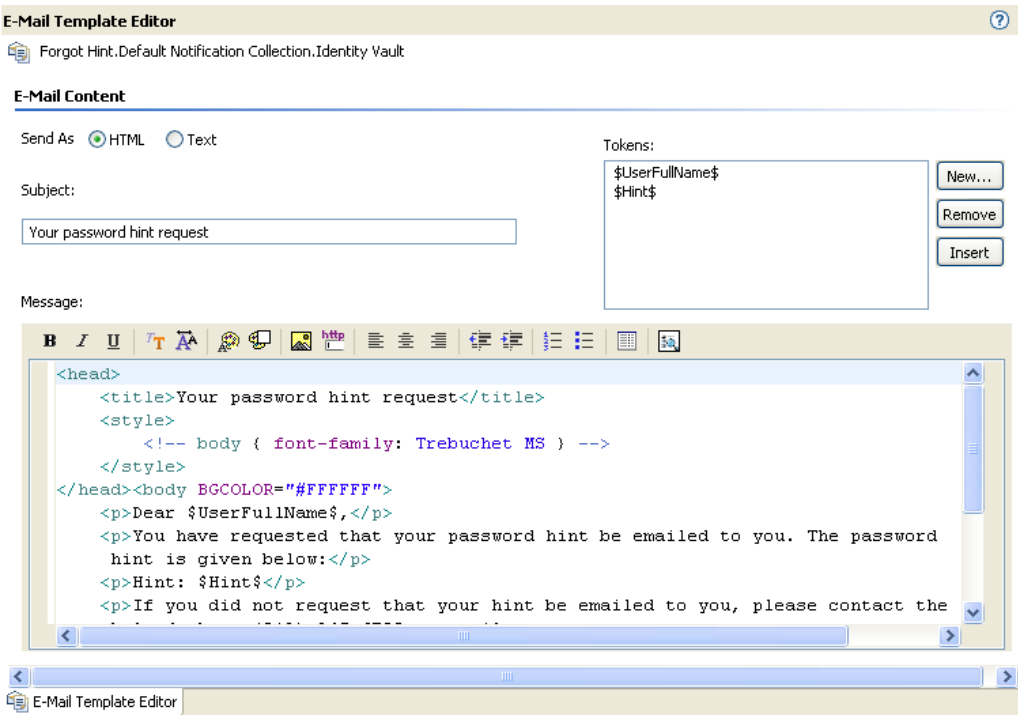
The following template is used with the Jobs functionality available for the Identity Manager engine. For more information, see “[Adding a Predefined Job](#)” in the *NetIQ Identity Manager Jobs Guide*.

Table 3-4 Jobs Template

Template Name	Description
Default Job Notification	Report results of the job as configured in the template. Contains the name of a job and any status information from the job.

Editing a Template in Designer

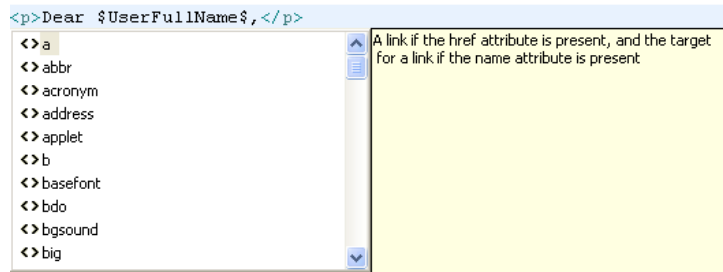
- 1 Open your project.
- 2 In the Outline view, locate and expand the **Default Notification Collection** to display the default templates.
- 3 (Conditional) If no templates are displayed under the **Default Notification Collection**, right-click **Default Notification Collection**, then click **Add Default Templates**.
- 4 Double-click the template you want to edit.



- 5 In the **Send As** field, select whether to send the e-mail in HTML format or in text format.
- 6 In the **Subject** field, type the text that you want users to see in the e-mail's Subject line.
You can use tokens in the Subject field. To do so, click where you want to insert the token, select the token from the **Tokens** list, then click **Insert**. For information about adding new tokens, see [Appendix A, "Tokens and Replacement Tags," on page 27](#).
- 7 In the **Message** box, type the message you want.
 - ♦ To format text, use the toolbar.



- ♦ To insert HTML tags, place your cursor in the Message box at the location where you want to insert a tag, then press Ctrl+Spacebar or type < to display a list of HTML tags to choose from.



- ♦ To insert a token, place your cursor in the Message box at the location where you want to insert the token, select the token in the Tokens list, then click **Insert**. For information about adding new tokens, see [Appendix A, “Tokens and Replacement Tags,”](#) on page 27.
 - ♦ To preview the message, click the **Preview** icon .
- 8 To attach an image to an e-mail, ensure that you place the image files in the correct directory depending on your platform:
 - ♦ **UNIX/Linux:** Place the images in the /opt/novell/eDirectory/lib/dirxml/rules/manualtask/mt_files directory.
 - ♦ **Windows:** Place the images in the <eDirectory installation folder>\NDS\mt_files directory.
 - 8a In your e-mail template, use the following syntax to attach images:


```
<p> <img ALT="your image" SRC="cid:orchid.gif" height="29 width="80/> </p>
```

where orchid is the name of the image.

Because the file name is case sensitive, the name of the file (image) must exactly match with the file name in the directory.
 - 8b Restart the system after placing the image files in the correct directory for your platform.

For example, if an e-mail has already been sent, you need to restart ndsd/eDirectory for it to use the new image.

 - ♦ **UNIX/Linux:** Restart ndsd.
 - ♦ **Windows:** Restart eDirectory.
 - 9 Right-click the template and click **Save As**.
 - 10 To deploy the template into your live system, right-click the template, click **Live > Deploy**.

Editing a Template in Identity Console

- 1 On the Identity Console home page, click **Email Notification Templates**.
- 2 Click the e-mail template you want to edit.
- 3 The Edit Email Notification Template page enables you to modify the email template. You can customize the template with your own text.
 - ♦ **Template Name:** Displays the name of the template.

- ♦ **Subject:** The text that a user views in an email's Subject headline. You can change the text of the subject line. The actual name of the template remains the same.
- ♦ **Send As:** The format that the SMTP server uses to send the email: Text or HTML.
- ♦ **Tokens or Replacement Tags:** The replacement tags help you personalize the message for the user. You can copy replacement tags from the list of available tags and paste them into the message. You can also simply type the tag in the message text. For information about adding new tokens, see [Appendix A, “Tokens and Replacement Tags,” on page 27](#).

Each template includes default tokens or replacement tags, which are variables needed to personalize the email for the user. For example, the Forgot Password email template for sending a password to the user includes the default token or replacement tag named 'CurrentPassword.'

- ♦ **Add:** You can define other tokens or replacement tags for use in the body of the message.

To add a token or replacement tag, perform the following steps:

1. Click **+ Add Tag**.
2. Specify the **Name** and **Description** in Add Replacement Tag window.
3. Click **Ok**.

The new token or replacement tag lists in Replacement Tags column.

- ♦ **Copy Tag:** Click **Copy Tag** icon to copy the selected tag to the system buffer, and then you can click mouse to paste it and utilize in subject line or body of the message.
- ♦ **Delete:** Select a token or replacement tag in the list and click **Delete Tag** icon to delete the tag from the list. Ensure you do not remove tags that are needed for the body of the message.

- ♦ **Message Body:** The text of the email message.

- 4 To attach an image to an e-mail, follow [Step 8 on page 16](#) in “Editing a Template in Designer” on [page 15](#).

IMPORTANT: Identity Console applies some restrictions on adding or editing some attributes in HTML tags such as src. You must use Designer to edit these attributes.

- 5 Click **Update** after specifying all the email notification template modifications.

4 Creating Templates

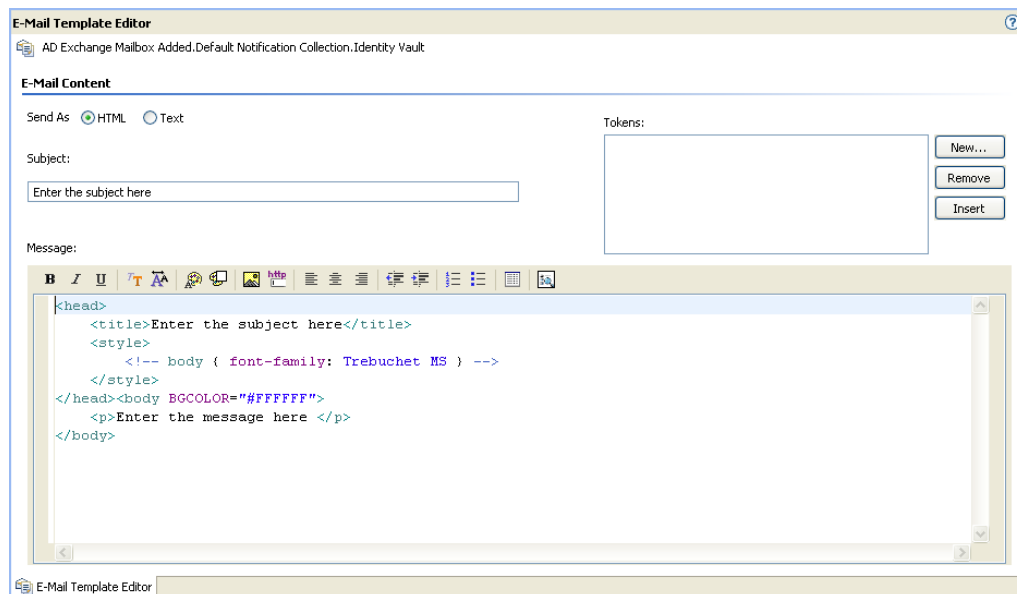
You can create e-mail notification templates to support custom functionality that you implement in Identity Manager. For example, if you use the Active Directory driver to create Microsoft Exchange mailboxes in Active Directory, you can include an action in the Active Directory driver policy that sends an e-mail to the user when his or her mailbox has been created. To support this e-mail, you can create a template that includes the text required to inform the user about the new mailbox

The following sections provide information about creating new templates:

- ♦ “Creating a Template in Designer” on page 19
- ♦ “Creating a Template in Identity Console” on page 20

Creating a Template in Designer

- 1 Open your project.
- 2 In the Outline view, right-click **Default Notification Collection** > click **New Template** to display the Add Notification Template dialog box.
- 3 In the **Name** field, type a name for the template.
- 4 Make sure the **Open the editor after creating a template** option is selected, then click **OK** to create the template and display the template editor.



- 5 In the **Send As** field, select whether to send the e-mail in HTML format or in text format.
- 6 In the **Subject** field, type the text that you want users to see in the e-mail's Subject line.

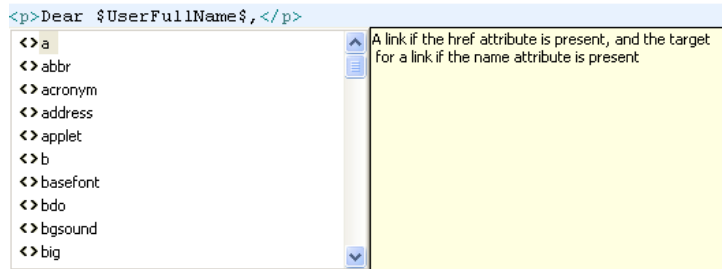
You can use tokens in the Subject field. To do so, click where you want to insert the token, select the token from the **Tokens** list, then click **Insert**. For information about adding new tokens, see [Appendix A, “Tokens and Replacement Tags,” on page 27](#).

7 In the **Message** box, type the message you want.

- ♦ To format text, use the toolbar.



- ♦ To insert HTML tags, place your cursor in the Message box at the location where you want to insert a tag, then press Ctrl+Spacebar or type < to display a list of HTML tags to choose from.



- ♦ To insert a token, place your cursor in the Message box at the location where you want to insert the token, select the token in the Tokens list, then click **Insert**. For information about adding new tokens, see [Appendix A, “Tokens and Replacement Tags,” on page 27](#).
- ♦ To preview the message, click the **Preview** icon

8 Click **OK** to save the template.

9 To deploy the template into your live system, right-click the template, click **Live > Deploy**.

Creating a Template in Identity Console

1 On the Identity Console home page, click **Email Notification Templates**.

2 Click **+ Create a new template**.

3 Specify a name for the new template (for example, Approval) and click **OK**. display the Modify E-mail Message page.

If you have disabled pop-ups, you return to the Edit Email Notification Template pop-up. The new template name appears in the Name column, but [No Subject] appears in the Subject headline column. In this case, click [No Subject] so that you can provide details in the new template.

4 The Edit Email Notification Template page enables you to modify the email template. You can customize the template with your own text.

- ♦ **Template Name:** Displays the name of the template.
- ♦ **Subject:** The text that a user views in an email's Subject headline. You can change the text of the subject line. The actual name of the template remains the same.
- ♦ **Send As:** The format that the SMTP server uses to send the email: Text or HTML.

- ♦ **Tokens or Replacement Tags:** The replacement tags help you personalize the message for the user. You can copy replacement tags from the list of available tags and paste them into the message. You can also simply type the tag in the message text. For information about adding new tokens, see [Appendix A, “Tokens and Replacement Tags,” on page 27](#).

Each template includes default tokens or replacement tags, which are variables needed to personalize the email for the user. For example, the Forgot Password email template for sending a password to the user includes the default token or replacement tag named ‘CurrentPassword.’

- ♦ **Add:** You can define other tokens or replacement tags for use in the body of the message.

To add a token or replacement tag, perform the following steps:

1. Click **+ Add Tag**.
2. Specify the **Name** and **Description** in Add Replacement Tag window.
3. Click **Ok**.

The new token or replacement tag lists in Replacement Tags column.

- ♦ **Copy Tag:** Click **Copy Tag** icon to copy the selected tag to the system buffer, and then you can click mouse to paste it and utilize in subject line or body of the message.
- ♦ **Delete:** Select a token or replacement tag in the list and click **Delete Tag** icon to delete the tag from the list. Ensure you do not remove tags that are needed for the body of the message.

- ♦ **Message Body:** The text of the email message.

5 Click **Update** after specifying all the email notification template modifications.

5 Importing Templates Into Designer

In order to work on an e-mail notification template that is located in the Identity Vault but not in your Designer project, you must import the template into the Designer project. Likewise, to copy a template from one Designer project to another, you must save it from the first project and import it into the second project. The following sections explain how to accomplish each of these tasks:

- ♦ [“Importing a Template from the Identity Vault” on page 23](#)
- ♦ [“Importing a Template from another Designer Project” on page 23](#)

Importing a Template from the Identity Vault

The following situations can result in templates being located in your Identity Vault but not in your Designer project:

- ♦ Identity Console is used to modify a predefined template or create a new template.
- ♦ A template is created or modified in one Designer project and deployed to the Identity Vault. You now need it in another Designer project.

To import a template from the Identity Vault into a Designer project:

- 1 In Designer, open the project into which you want to import the template.
- 2 In the Outline view, right-click **Default Notification Collection**, then click **Live > Import** to display the **Import from Identity Vault** dialog box.
- 3 Click **Browse**, select the template to import, then click **OK** to add the template to the list of objects to import in the **Import from Identity Vault** dialog box.
- 4 Click **Continue** to display the Import Summary dialog box.
- 5 Click **Import**, then click **OK** when the import results are displayed.

Importing a Template from another Designer Project

If you create or edit a template in one Designer project, you can import it to another Designer project.

- 1 In Designer, open the source project. This is the project with the template you want to copy.
- 2 Save the template to a file:
 - 2a In the Outline view, locate and expand the **Default Notification Collection**, right-click the template, then click **Save As** to display the **Save As** dialog box.
 - 2b Select the folder where you want to save the template file, then click **Save**.

3 Import the template file into the target project:

3a Open the target project.

3b In the Outline view, right-click the **Default Notification Collection**, then click **Import Template from File**.

3c Select the template file, then click **Open** to add it to the project.

If a template with the same name already exists, you are prompted to overwrite it.

Another way to copy the template is to deploy it from the source project into the Identity Vault and then import it into the target project (as explained in [“Importing a Template from the Identity Vault” on page 23](#)).

6 Using Templates

The predefined templates (see [“List of Predefined Templates” on page 13](#)) are associated with existing Identity Manager functionality. Refer to the following guides for information about using these templates:

- ♦ **Forgotten Password/Hint Templates:** See Password Management Configuration in the *NetIQ Identity Manager - Administrator's Guide to the Identity Applications*.
- ♦ **Password Synchronization Templates:** See [“Configuring Password Flow”](#) in the *NetIQ Identity Manager Password Management Guide*.
- ♦ **Workflow Provisioning Templates:** See [“Managing Provisioning Workflows”](#) in the *NetIQ Identity Manager - Administrator's Guide to the Identity Applications*.
- ♦ **Jobs Template:** See [“Adding a Predefined Job”](#) in the *NetIQ Identity Manager Jobs Guide*.

For information about using templates with policies, see [“Send Email from Template”](#) in the *NetIQ Identity Manager - Using Designer to Create Policies* guide. For an example of how to implement templates in a policy, see [“Configuring E-Mail Notification”](#) in the *NetIQ Identity Manager Password Management Guide*.

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Tokens and Replacement Tags

Tokens, or replacement tags, are variables that can be used in the message body or subject line of e-mail notification templates.

Each predefined template includes default tokens. For example, the Forgot Password e-mail template (used to send a password to a user) includes the default token named `$CurrentPassword$`. When the e-mail is sent, the `$CurrentPassword$` token is replaced with the user's current password.

For a token to work in an e-mail template, it must be defined in the application or the policy that initiates the e-mail notification. This enables the application or policy to provide the correct token information to the e-mail template.

Tokens Defined in Applications

The Workflow engine and Jobs engine provide the provisioning workflow and jobs functionality. To add tokens to the predefined e-mail templates used with these applications requires the tokens to be defined in the applications. This is true of any application that you create for use with Identity Manager.

Tokens Defined in Policies

More than likely, you'll add driver policies with rules that initiate e-mail notifications, rather than creating or modifying applications that initiate e-mails. For example, if you use the Active Directory driver to create Microsoft Exchange mailboxes in Active Directory, you might include an action in the Active Directory driver policy that sends an e-mail to the user when his or her mailbox has been created.

When you create policies that initiate e-mail notifications, the tokens used in the notification templates must be defined in the policy rules.

For example, the tokens used with the predefined password synchronization e-mail templates are defined in the password synchronization policies used by the drivers. To add tokens to the password synchronization templates requires that the new tokens be defined in the policies.

You can use the password synchronization policies as an example of how to define tokens that you want to use in an e-mail template. See "[Configuring E-Mail Notification](#)" in the *NetIQ Identity Manager Password Management Guide*.

