

Windows Matching

Do you want to:

- [Learn about Windows matching](#)
- [Add matching Windows form](#)
- [Edit matching Windows form](#)
- [Delete matching Windows form](#)

About Windows Matching

Windows matching is only available for Windows (native or Java) applications. You use Windows matching when there are two windows in the same application that are almost identical and use the same credentials. This situation is not common but can occur in some applications.

When you configure a match, you identify criteria that uniquely distinguishes one window from another, and you set how the RSA Sign-On Manager Client will respond to each window. The Client uses this information to identify each window and either supply the same credentials to both windows or ignore one of them.

For example, an application might use the same credentials to log on to different parts of the same application, such as e-mail and a calendar. If the e-mail logon form has already been configured, a matching calendar logon form can be added. To distinguish the forms, you need to add a match criteria for the calendar logon form to show how a field with the same control ID as a field in the e-mail logon form is different. The Client recognizes each form and supplies credentials to both.

Another scenario is an application that requires the same user name and password to log on to different parts of the application; for example, an application with an additional feature that only certain users can access. The administrator could identify the form that the Client must ignore so that a permitted user must manually enter any required credentials.

To configure an application so that the Client can recognize matching windows, you add a matching form to the application. You do this by using the following information:

Match Name. The name for the matching form.

Match Type. The purpose of the form. You can add the following types of matching forms for password authentication by using the wizard:

- Ignore—The Client ignores this form and does not supply credentials.
- Logon—The Client identifies this form as a logon form.
- Password Change—The Client identifies this form as a form for changing passwords.
- Password Confirm—The Client identifies this form as a form for confirming passwords.

For RSA SecurID authentication, you can add the following types of matching forms:

- Ignore—The Client ignores this form and does not supply credentials.
- RSA SecurID logon—The Client identifies this form as a logon form.
- PIN Change—The Client identifies this form as a form for changing PINs.
- PIN Confirm—The Client identifies this form as a form for confirming PINs.

Window Titles. The title of the matching form. The titles of all forms configured for this application are in the list.

Match Criteria. The information the Client uses to distinguish a field on the matching form. You distinguish a field using one of the following criteria:

- Class—Identifies whether the field contains read-only text (static) or editable text (edit)
- Style—Specifies a number to identify the style of the control
- Text—Identifies specific text that displays in the user's window

Control ID. The numerical identifier for each field that the Client supplies credentials.

You add a match using the wizard. You can edit the matching form manually or by using the wizard.

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Also See...

- [Application Forms](#)
- [Windows Forms](#)

Add Matching Windows Form

To simplify the process of adding a matching Windows form, the RSA Sign-On Manager Server supplies the Application Learning Wizard to help you extract the matching criteria from a window that is open on your desktop.

To add a matching Windows form:

1. Click **Manage Single Sign-On > Applications > Manage Existing**.
2. Search for the application you want to edit. To filter the list to display applications that you can modify, select **Limit display to applications within my scope**.
3. From the results table, click **Edit > Manage Forms**.
4. In the Forms table, click **Edit > Match Forms** for the form with a matching form.
5. In the Matches page, click **Add New**.

The wizard launches.

6. In the wizard, identify the form type.

The wizard displays a list of all the applications that are open on your desktop.

7. In the Application Window list, select the application you want to configure.

The open logon window is highlighted by a flashing border.

8. Click **Next**.
9. In the **Match Fields** list, select a field and right-click to select a match criteria that identifies the field: class, text, or style, or no criteria.
10. Click **Next**.
11. If the form is not a form the RSA Sign-On Manager Client ignores, select the fields for the Client to supply credentials. Select the field, and right-click to select the type of field from the list.
12. Click **Next**.

A Summary page displays.

13. Click **Finish**.

The Add Match page displays.

14. In the **Match Name** box, enter a name for the match.

15. Click **Save**.

Also See...

- [Windows Matching](#)
- [Edit Match](#)
- [Delete Match](#)

Edit Matching Windows Form

You can edit a matching Windows form [using the Wizard](#) or [manually](#).

 **Note:** If you edit using the wizard, the matching form is rewritten. Only the name is retained.

Edit Match Using Wizard

To edit a matching Windows form using the wizard:

1. Click **Manage Single Sign-On > Applications > Manage Existing**.
2. Search for the application you want to edit. To filter the list to display applications that you can modify, select **Limit display to applications within my scope**.
3. From the results table, click **Edit > Manage Forms**.
4. In the forms table, click **Edit > Match Forms** for the form with a matching form.
5. In the matches table, click **Edit > Edit with Wizard**.

The wizard launches.
6. Complete the wizard using the directions in [Add Match](#), as appropriate.
7. On the Edit Match page, click **Save**.

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Edit Match Manually

To edit a matching Windows form manually:

1. Click **Manage Single Sign-On > Applications > Manage Existing**.
2. Search for the application you want to edit.
3. From the results table, click **Edit > Manage Forms**.
4. In the Forms table, click **Edit > Match Forms** for the form with a matching form.
5. In the Matches table, click **Edit > Edit Manually**.
6. On the Edit Match page, edit the **Match Name**, **Match Type**, or **Window Titles**, using the instructions in [Windows Matching](#) as a guide.
7. Under **Match Criteria**:
 - a. Click **Add New** to add a new match criteria or click **Edit** to edit an existing match criteria.
 - b. On the Edit Match Criteria page, edit the **Control ID** or **Match Condition**, as necessary.

 **Note:** You cannot edit Match Criteria for Java applications manually.

8. Under **Control IDs**:
 - a. To add a new Control ID or click **Edit** to edit an existing Control ID, click **Add New**.

These fields are unavailable if the type is **Ignore**.
 - b. In the Edit Control ID page, edit the **Field** and **Control ID**, as necessary.

 **Note:** You cannot edit Control IDs for Java applications manually.

9. To temporarily save your changes and return to the Edit Match page, click **Apply to Match**.
10. Click **Save**.

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Also See...

- [Windows Matching](#)
- [Add Match](#)
- [Delete Match](#)

Delete Matching Windows Form

To delete a matching Windows form:

1. Click **Manage Single Sign-On > Applications > Manage Existing**.
2. Search for the application you want to edit. To filter the list to display applications you can modify, select **Limit display to applications within my scope**.
3. In the results table, click **Edit > Manage Forms**.
4. In the Forms table, click **Edit > Match Forms** for the form with a matching form.
5. In the Matches page, select **Delete** for the matching form you want to delete. To delete all matching forms that can be deleted on the page, select the checkbox in the table header.
6. Click **Delete**.

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Also See...

- [Windows Matching](#)
- [Add Match](#)
- [Edit Match](#)

Web Matching

Do you want to:

- [Learn about web matching](#)
- [Add detection match to identify one web form in an application with multiple pages that have the same URL](#)
- [Add detection match and offset match to identify one web form on a page with several forms](#)
- [Edit web matching](#)
- [Delete web matching](#)

About Web Matching

You use web matching to enable single sign-on when you cannot use the URL. Usually, RSA Sign-On Manager identifies a web form by the URL of the page that contains the form. When an application has multiple pages with the same URL that contain forms, you cannot use an exact URL match to identify the page. To solve this problem, web matching uses a page's HTML code to add a detection match or a detection match and an offset match to identify a form on the page.

Add a Detection Match to Identify One Web Form in an Application with Multiple Pages that Have the Same URL

You use web matching to add a detection match to identify one web form in an application with multiple pages that have the same URL. This allows you to distinguish between similar web forms on different pages. For example, an application might have a logon form on both the home page and exit page. To prevent Sign-On Manager Client from automatically logging users back on when they arrive at the exit page, you use web matching to distinguish the exit page from the home page. Once you have done that, the Client provides credentials to the home page but ignores the exit page.

For more information about how the Client identifies a web form, see [Web Forms](#).

Add a Detection Match and an Offset Match to Identify One Web Form on a Page with Several Forms

You also use web matching to add a detection match to identify a page with more than one web form and an offset match to identify one of the forms on that page. For example, a web application might have a portal page that contains several forms that provide access to different resources such as a database or a document library. If you want to give users single sign-on access to just one resource, you use web matching to identify the page with multiple forms and the form on that page you want to supply with credentials.

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Match Item Contents

To add a detection or an offset match, you make one or more match items for a page. Each match item contains a [page element](#) and an [operator](#).

Page Element

The page element part of a match item identifies the HTML tag that contains the element, the criteria that identifies what kind of HTML element it is, and the value that identifies the element itself.

Tag. The HTML tag name that contains the criteria on the page you want to match. For example, p or div.

Criteria. The kind of HTML element used to identify the page.

- Text: Any text in the HTML code.
- HTML: Any HTML code found within a match tag.
- Attribute: Any attribute in the HTML code.

 **Note:** Use **Text** as the primary match criteria. Only use **HTML** or **Attribute** when you cannot use **Text**.

Value. The string you want the criteria to match. For example,

- Text: <p>Partner Database</p>
- HTML: <p>Partner Database</p>

 **Note:** HTML values are case-sensitive for both the tags and the text. Some browsers alter tags while processing HTML code, and this causes a match to fail. You cannot use the tags <address>, <blockquote>, <center>, <h1>, <div>, <hr>, and <pre> as values to match.

- Attribute: name="portalLogon_1"

Operator

After you have specified the page element for a match item, you select an AND, OR, or NOT operator to determine how the web match is processed. You use the AND or operator when you want the Client to supply credentials to a form. You use the NOT operator when you do not want the Client to supply credentials to a form.

AND. The system determines whether all the match items you have made for this page are present. If there is only one match item, the AND operator is ignored and only that match item is evaluated. If the result is true (the match item describes something that is on the page), the Client supplies credentials to the form. If more than one match item is used, the Client supplies credentials only if all of the match items are true.

For example, an administrator adds a web match for a page using these two match items:

Tag	Criteria	Value	Operation
p	text	Partner Database	AND
p	text	locate	AND

When a user arrives at a web page where both match items ("Partner Database" and "locate") are on the page, the Client supplies credentials to the form on that page.

OR. The system determines whether any match items you have made for this page are present. If there is only one match item, the OR operator is ignored and only that match item is evaluated. If the result is true (the match item describes something that is on the page), the Client supplies credentials to the form. If more than one match item is used, the Client supplies credentials if any of the match items are true.

For example, an administrator adds a web match for a page using these two match items:

Tag	Criteria	Value	Operation
p	text	Partner Database	OR
p	text	locate	OR

When a user arrives at a web page where either match items ("Partner Database" or "locate") are on the page, the Client supplies credentials to the form on that page.

NOT. The system determines whether all of the match items are present on the page. If the result is true (all the match items describe something that is on the page), the Client does not supply credentials to the form. The NOT operator works exactly the opposite of the AND operator.

You must use at least two match items for the NOT operator to work. If there is only one web match, the NOT operator is ignored and the web match is evaluated as if the AND operator is chosen. When you use the NOT operator, all the match items for that web match must use the NOT operator. You cannot combine the NOT operator with either the AND or the OR operators.

For example, an administrator adds a web match for a page using these two match items:

Tag	Criteria	Value	Operation
p	text	Partner Database	NOT
p	text	locate	NOT

When a user arrives at a web page where both match items ("Partner Database" and "locate") are on the page, the Client does not supply credentials to the form on that page.

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Also See...

- [Application Forms](#)
- [Windows Forms](#)

Add Detection Match to Identify One Web Form in an Application with Multiple Pages that Have the Same URL

If you have a web application with multiple pages that have the same URL, and you want Sign-On Manager Client to supply credentials to a form on one of the pages, you add a detection match. A detection match enables the Client to supply credentials to a form when you cannot identify a web page with an exact URL match. You add a detection match by making one or more match items. For more information, see [Web Matching](#).

If you want the Client to supply credentials to one web form on a page with several forms, add an [offset match](#) in addition to a detection match.

To add a detection match:

1. Click **Manage Single Sign-On > Applications > Manage Existing**, and search for the application you want to modify. To filter the list to display applications that you can modify, select **Limit display to applications within my scope**.
2. From the results table, click **Edit > Manage Forms** for the appropriate application.
3. In the Forms table, click **Edit > Match Forms** for the appropriate form.
4. Under **Detection Match**, click **Add New**. The Add Detection Match page opens. To find the **Tag**, **Criteria**, and **Value** information, view the source code of the page that contains the web form. To view the source code, open the page in a web browser, and follow the browser instructions for displaying the code.
5. For **Tag**, enter the HTML tag name that contains the criteria you want to match.

 **Important:** Do not use angle brackets in this field. For example, use p, not <p>.

6. If necessary, select **Match tag instance**, and enter the number of the tag instance that contains the criteria you want to match. For example, if the criteria is inside the first <p> tag on the page, enter **1**. If you do not select an instance, Sign-On Manager searches all tags of the specified type.

 **Note:** Because the tag instance can vary from browser to browser, use the Match tag instance only when the system cannot make a match without it.

7. For **Criteria**, select the HTML element you want to match. If you select **Attribute**, enter the attribute name in the corresponding field.
8. For **Value**, enter the string you want the selected criteria to match.
9. If necessary, select **Match whole value**. If you select **Match whole value**, any additional text in the tag contents causes the match to fail.

 **Note:** Use this option only if the application has several instances of similar matching criteria.

10. For **Operation**, select the appropriate operator from the drop-down list:
 - Select **AND** to make multiple matches.
 - Select **OR** to make alternative matches.
 - Select **NOT** to make a negative match. If you make a negative match, the Client does not supply credentials to a form. A negative match requires two match items. For more information, see [About Web Matching](#).
11. Click **Apply to Form**. When the Matches page opens, click **Save**.

Also See...

- [Web Matching](#)
- [Identify One Web Form on a Page with Several Forms](#)
- [Edit Web Matching](#)
- [Delete Web Matching](#)

Add Detection Match and Offset Match to Identify One Web Form on a Page with Several Forms

If a page has more than one web form, and you want Sign-On Manager Client to supply credentials only to one form, you add a detection match to identify the page and an offset match to identify a form on the page. An offset match uses one or more match items to exclude the forms you want the Client to ignore. For more information, see [Web Matching](#).

If you want the Client to supply credentials to a web form on a page with only one form, add a [detection match](#).

If you want the Client to supply credentials to a web form on a page with more than one form, add a [detection match](#), then add an offset match. For an example of this procedure, see [Identify One Web Form on a Page with Several Forms](#).

To add an offset match:

1. Click **Manage Single Sign-On > Applications > Manage Existing**.
2. Search for the application you want to modify. To filter the list to display applications that you can modify, select **Limit display to applications within my scope**.
3. From the results table, click **Edit > Manage Forms** for the appropriate application.
4. In the Forms table, click **Edit > Match Forms** for the appropriate form.
5. Under **Form Offset Match**, click **Add New**. The Add Form Offset Match page opens. To find the **Tag**, **Criteria**, and **Value** information, view the source code of the page that contains the web forms. To view the source code, open the page in a web browser and follow the browser instructions for displaying the code.
6. Under **Tag**, enter the name of the HTML tag that contains the criteria you want to match.

! > Important: Do not use angle brackets in this field. For example, use p, not <p>.

7. If necessary, select **Match tag instance**, and enter the number of the tag instance that contains the criteria you want to match. For example, if the criteria is inside the first <p> tag on the page, enter **1**. If you do not select an instance, Sign-On Manager searches all tags of the specified type.

 **Note:** Because the tag instance can vary from browser to browser, use the Match tag instance only when the system cannot make a match without it.

8. Under **Criteria**, select the HTML element you want to match. If you select **Attribute**, enter the attribute name in the corresponding field.
9. Under **Value**, enter the string you want the selected criteria to match. If necessary, select **Match whole value**. If you select **Match whole value**, any additional text in the tag contents causes the match to fail.

 **Note:** Only use this option if the application has several instances of similar matching criteria.

10. Under **Operation**, select the appropriate operator from the drop-down list:
 - Select **AND** to create multiple matches.
 - Select **OR** to create alternative matches.

For more information, see [Web Matching](#).

11. Click **Apply to Form**. When the Matches page opens, click **Save**.

Also See...

- [Web Matching](#)
- [Identify a Web Page in an Application with Multiple Pages that Have the Same URL](#)
- [Edit Web Matching](#)
- [Delete Web Matching](#)

Edit Web Matching

You might edit a web match if a detection match or an offset match stops working. A web match can stop working when the HTML code used for web matching changes.

To edit web matching:

1. Click **Manage Single Sign-On > Applications > Manage Existing**.
2. Search for the application you want to edit. To filter the list to display applications that you can modify, select **Limit display to applications within my scope**.
3. From the results table, click **Edit > Manage Forms** for the appropriate application.
4. In the Forms table, click **Edit > Match Forms** for the appropriate form.
5. In the Matches table, click **Edit**. Depending on the type of web matching chosen, the Edit Detection Match page or the Edit Form Offset Match page opens. To edit the **Tag**, **Criteria**, and **Value** information, view the source code of the page with the web form. To view the source code, open the page in a web browser and follow the browser instructions for displaying the code.
6. On the Edit Detection Match page or the Edit Form Offset Match page, edit the **Tag**, **Criteria**, **Value**, or **Operation** using the information in [Web Matching](#) as a guide.
7. Click **Apply to Form**. When the Matches page opens, click **Save**.

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Also See...

- [Web Matching](#)
- [Identify a Web Page in an Application with Multiple Pages that Have the Same URL](#)
- [Identify One Web Form on a Page with Several Forms](#)
- [Delete Web Matching](#)

Delete Web Matching

You might delete a web match if a web application no longer requires a detection match or an offset match for single sign-on.

To delete web matching:

1. Click **Manage Single Sign-On > Applications > Manage Existing**.
2. Search for the application you want to modify. To filter the list to display applications that you can modify, select **Limit display to applications within my scope**.
3. In the results table, click **Edit > Manage Forms** for the appropriate application.
4. In the Forms table, click **Edit > Match Forms** for the appropriate form.
5. In the Matches page, select **Delete** checkbox in the table header for the match you want to delete.
6. Click **Delete > OK**. The Matches page displays. Click **Save**.

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Also See...

- [Web Matching](#)
- [Identify a Web Page in an Application with Multiple Pages that Have the Same URL](#)
- [Identify One Web Form on a Page with Several Forms](#)
- [Edit Web Matching](#)