Notices

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Please refer to the Release Notes applicable to the particular Progress product release for any third-party acknowledgements required to be provided in the documentation associated with the Progress product.

The Release Notes can be found in the OpenEdge installation directory and online at:

For the latest documentation updates see OpenEdge Product Documentation on Progress Communities: (https://community.progress.com/technicalusers/w/openedgegeneral/1329.openedge-product-documentation-overview.aspx).

October 2015

Last updated with new content: Release 11.6.0
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Preface

For details, see the following topics:

• About this documentation
• User types
• Information on documentation
• Conventions used in this manual
• Product support contact information

About this documentation

This guide is part of the documentation set for Progress OpenEdge Business Process Server.

User types

Progress OpenEdge Business Process Server is a business process management system that can be used by the following types of users:

<table>
<thead>
<tr>
<th>User type</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>User type</td>
<td>Responsibilities</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Manager</td>
<td>Responsible for automating business processes in a particular business domain. Business Process Portal's Management module serves as the primary interface to Business Process Server for the Manager, enabling the manager to monitor, analyze, and control business processes. Also uses the Business Process Modeler for modeling and simulation.</td>
</tr>
<tr>
<td>Application Developer</td>
<td>Responsible for creating customized applications for implementing business processes and developing interfaces associated with tasks. Application developers may work closely with Managers to define the requirements of an application, and determine the business processes.</td>
</tr>
</tbody>
</table>

### Information on documentation

This documentation includes information for the entire range of Progress OpenEdge Business Process Server users. In the following table, we recommend the guides that are most relevant to each type of user.

<table>
<thead>
<tr>
<th>If you are the ...</th>
<th>Read the ...</th>
</tr>
</thead>
</table>
|                    | *First Steps Guide*  
|                    | *Terminology Guide*                                                                                                                            |
| Manager            | *Business Process Portal Manager's Guide*  
|                    | *Business Process Portal User's Guide*  
<p>|                    | <em>Terminology Guide</em>                                                                                                                            |</p>
<table>
<thead>
<tr>
<th>If you are the ...</th>
<th>Read the …</th>
</tr>
</thead>
</table>

For the latest Business Process Server documentation updates, see OpenEdge Product Documentation on PSDN (http://communities.progress.com/pcom/docs/DOC-16074).

## Conventions used in this manual

This document uses the following conventions and terminology notations.

<table>
<thead>
<tr>
<th>Convention (styles and terms)</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>bold</strong></td>
<td>Indicates titles of command buttons, check boxes, options, lists, dialog boxes, and portal page names.</td>
</tr>
<tr>
<td><em>file path</em></td>
<td>Indicates folder paths and file names.</td>
</tr>
<tr>
<td>Convention (styles and terms)</td>
<td>Purpose</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------</td>
</tr>
<tr>
<td><em>italic</em></td>
<td>Indicates book titles.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Represents code segments or examples.</td>
</tr>
<tr>
<td><code>\</code></td>
<td>Indicates the path in Windows environment. For UNIX environment, replace with forward slash <code>/</code>.</td>
</tr>
<tr>
<td><code>OEBPS_HOME</code> or <code>%OEBPS_HOME%</code></td>
<td>Represents the installation folder of Business Process Server, <code>C:\Progress\OpenEdge\oebpm\server</code>.</td>
</tr>
<tr>
<td><code>STUDIO_HOME</code> or <code>%STUDIO_HOME%</code></td>
<td>Represents the installation folder of OpenEdge BPM components, <code>C:\Progress\OpenEdge\oebpm\studio</code>.</td>
</tr>
<tr>
<td><code>JBOSS_HOME</code> or <code>%JBOSS_HOME%</code></td>
<td>Represents the installation folder of JBOSS server, <code>C:\Progress\OpenEdge\oebpm\jboss</code>.</td>
</tr>
</tbody>
</table>

### Product support contact information

If the product documentation does not provide a solution to your specific issue, or if you need clarification on the issue, then contact our Product Support team. You can contact the team through the Internet, telephone, or postal mail, as per the details provided in the following table.

**Table 1: Product Support Contact Information**

<table>
<thead>
<tr>
<th>To contact by</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web site</td>
<td><a href="http://progresslink.progress.com/supportlink">http://progresslink.progress.com/supportlink</a></td>
</tr>
<tr>
<td></td>
<td>If you are an existing customer, then you can log in to the above site for product support. If you are a first time user, then you need to create an account first.</td>
</tr>
<tr>
<td>Telephone†</td>
<td>1-781-280-4999 for US, Latin America and Canada</td>
</tr>
<tr>
<td></td>
<td>1-781-280-4543 for the Product Support Fax Line</td>
</tr>
<tr>
<td>Postal Address†</td>
<td>Progress Software Corporation</td>
</tr>
<tr>
<td></td>
<td>14 Oak Park Drive</td>
</tr>
<tr>
<td></td>
<td>Bedford, MA 01730, USA.</td>
</tr>
</tbody>
</table>

To enable us to quickly answer your questions, please provide the following information:

- Your name, installation site address and the license key for Business Process Server software.

† For support telephone numbers and offices in your region, visit the support web site above. This contact information is for customer support only.
• Your Business Process Server version and build number.
• Your operating system, application server and browser, with version and service pack details, if any.
• Your database management system and version, and information on JVM and JDBC used.
OpenEdge Business Process Server overview

Progress Software Corporation is a leading global provider of automated business process management solutions. The company’s product, Progress OpenEdge Business Process Server (henceforth referred to as Business Process Server or BP Server), is a comprehensive business process management platform, which enables companies to quickly transform their business processes into flexible and manageable Web applications, distributed over intranets, extranets, and the Internet.

Business Process Server addresses every stage in the business life cycle: define, integrate, publish, monitor, analyze, improve, and control. By adopting an end-to-end approach, Business Process Server incorporates all the key elements required to meet the ever-changing demands of e-business while ensuring e-business success. By providing integrated management tools, Business Process Server lets you monitor operations proactively, modifying automated processes dynamically based on changing external operations online. An overview of a typical automated business process management solutions is shown in Figure 1 on page 20.
Business Process Server is a suite of integrated components that enables you to easily build intranet, extranet, and Internet applications and manage your e-business. Business Process Server consists of the following components as in Figure 2 on page 21:

- Business Process Server components
- How Business Process Server works
- Business Process Server user types
Table 2: Business Process Server components

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Process Portal Home</td>
<td>The Home module of Business Process Portal is the primary interface for application users, enabling them to interact with Business Process Server applications. Users can complete entries to various tasks and applications, and link to the support infrastructure required to complete these tasks.</td>
</tr>
<tr>
<td>Business Process Portal Management</td>
<td>The Management module enables managers to query, report on, and control processes and resources, visible only to the managers.</td>
</tr>
<tr>
<td>Business Process Portal Administration</td>
<td>The Administration module enables Business Process Server Administrators to modify configuration parameters, manage user or group access control, and install or uninstall Business Process Server applications.</td>
</tr>
<tr>
<td>Web services</td>
<td>This component allows application developers to: publish their applications as Web services, and find and convert other available Web services on the Internet into Business Process Server applications.</td>
</tr>
<tr>
<td>BPM Webflow</td>
<td>This component provides a framework for developing and implementing Web-enabled workflow applications.</td>
</tr>
</tbody>
</table>

Figure 2: Business Process Server components
### Component Description

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Progress Developer Studio for OpenEdge</td>
<td>This is the primary application development tool for Business Process Server, which provides an Eclipse-based integrated development environment in which users can create BPM projects, processes, Web applications, and rule files.</td>
</tr>
<tr>
<td>Business Process Modeler</td>
<td>This tool is used to design templates for basic business processes, and to run simulations of processes and individual worksteps.</td>
</tr>
<tr>
<td>BP Server</td>
<td>This is a flexible, lightweight, scalable workflow process engine for intranets, extranets, and the Internet.</td>
</tr>
<tr>
<td>BPM Events</td>
<td>This open, event-driven rule engine is used to formulate and enforce policies in business applications.</td>
</tr>
</tbody>
</table>

### How Business Process Server works

The following figure provides an overview of the interaction between Business Process Server components.

**Figure 3: How Business Process Server works**

![Diagram showing the interaction between Business Process Server components](image-url)
The following explanations correspond to the labels shown in the above figure, and describe how the components operate.

1. Progress Developer Studio for OpenEdge and Business Process Modeler provide an integrated development environment (IDE) for Business Process Server, where you can design and publish business processes. The application developer designs a process template (with the *.spt or *.swt extension) in the IDE that reflects the business flow and other business process requirements. Business rules for the process template can be defined using the Rule Editor, a BPM Events component that is launched with Progress Developer Studio for OpenEdge.


3. Once the process template is defined, Business Process Server Administrators use the Administration module to install the business process on the BP Server. Administrators can also configure Business Process Server components, manage user or group access control, and publish Business Process Server applications as Web services. Once installed, users access applications through servlets that pass the requests over an RMI/IIOP connection to the BP Server within an EJB Container.

4. The EJB Container provides a runtime environment that executes and manages Java-based program components that run on the server side of a client/server network. Within the EJB Container are the BP Server and BPM Events server.

5. The BP Server writes events to event tables in the database. Each Business Process uses JDBC to connect to database server as well as store events in the database. Within the BP Server, BPM Process Store uses JDBC to connect to the database server process and retrieve the events deposited by the BP Server process. BPM Process Store interprets the events and populates the process tables. These populated tables are used by Business Process Portal modules.

6. Once the process template is installed as a Business Process Server application, application users can use the Home module to do the following:
   - Access applications
   - Obtain information to perform their tasks
   - Launch the application to start process instances from the BP Server

7. Once the process template is installed as a Business Process Server application, managers can use the Management module (if they have access privileges) to monitor execution of process instances and create reports. Servlets receive requests from managers and pass them onto the BP Server over an RMI/IIOP connection. Managers use the Report Builder to define management reports that retrieve information through JDBC to the database server.

8. BPM Events is a rule-based event or message processing server that loads application rules and executes them against the BP Server and/or external events or messages. This server persists data in the database for recovery and with the help of JDBC connects to the database.

9. Managed Adapters exchange information between Business Process Server applications and external applications by converting Business Process Server-specific protocol to the protocol of an external system such as a database or ERP system. When users add a Managed Adapter to a work step, they can define complex mapping between Business Process Server dataslots and adapter inputs or outputs of the external application. At runtime when the work step is executed, the Managed Adapter sets the adapter inputs and configuration, and maps the outputs to the appropriate output dataslots.
10. BPM Webflow is a run-time component that executes the presentation flows. This component provides a Model, View, Controller (MVC) paradigm for developing presentation flow-based applications and executing them in a Web container.

11. Business Process Servers Web services component allows BP Server applications to be published as Web services.


Business Process Server user types

There are four user types within Business Process Server, Application users, Managers, Application developers, Business Process Server administrators.

User types

Each Business Process Server user type is defined below:

• **Application users** — Application Users use Business Process Server applications to coordinate specific business tasks with another department within their company, with another company within their organization, and/or with a business partner in another organization. The Home module in Business Process Portal serves as the primary interface in which Application Users run Business Process Server applications.

• **Managers** — Managers are typically experts in a particular business domain, such as quality assurance or human resources. They might need to work with managers from other groups in automating some of the business procedures that these groups share. The Management module in Business Process Portal serves as the primary Business Process Server interface for managers to coordinate and integrate business processes, enabling them to exchange information with one another, and to share functionality over such standard communication channels as the Internet or e-mail.

• **Application developers** — Application developers are responsible for analyzing business processes and developing interfaces associated with creating tasks or processes. Application developers are often not domain experts themselves, but work closely with Managers to define business processes and determine the requirements of an application. Application developers use Progress Developer Studio for OpenEdge or Business Process Modeler to define the business process; the resulting process template file is tested, simulated, published, and run as a Business Process Server application.

• **Business Process Server administrators** — Business Process Server administrators are responsible for configuring Business Process Server components, managing user or group profiles and access control, and installing or uninstalling Business Process Server applications. The Administration module in Business Process Portal serves as the primary interface for Business Process Server Administrators to administer applications.

All Business Process Server user types can communicate by using one or more Business Process Server applications. They can also communicate with external applications.
Getting started

Business Process Server provides primary Web-based user interface in the form of Business Process Portal. It is a complete portal through which you can interact with Business Process Server applications.

When you log into Business Process Portal, it displays the Home module tab for all users, irrespective of your user type and your user permissions. As an application user, you can display and modify tasks assigned to you, and manage your preferences. Depending on your user type and permissions, you can view and access other module tabs namely, Management and Administration.

If you have Manager rights, then the Management module is also available to you, where you can query, report, and control processes and resources for users.

If you also have administrative rights, in the Administration module, then you can modify configuration parameters controlling Business Process Server operations, manage components, and install/uninstall applications.

Note: Though all modules are shown to you in the figures in this guide, you can view and access only those modules for which you have access rights.

<table>
<thead>
<tr>
<th>Module name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>As an application User, view you tasks and instance.</td>
</tr>
</tbody>
</table>
This chapter describes how to log into and out of Business Process Portal, the screen layout, and how to explore the Home module’s interface. As the interface is uniform for all modules, this information is helpful for other modules also.

For details, see the following topics:

- Logging in to Business Process Portal
- Enabling multi-tab support
- Using themes
- Exploring Business Process Portal
- Getting support
- Accessing help
- Finding Business Process Server details
- Logging out of Business Process Portal

Logging in to Business Process Portal

To access Business Process Portal and use it, you need to log in to it. Your Business Process Server administrator typically adds you as a new Application User, and assigns you a User Name and Password. To log in to Business Process Portal, you need to use this User Name and Password.

To log in to Business Process Portal:

1. Start the Login page according to your platform:

<table>
<thead>
<tr>
<th>Using. . .</th>
<th>Perform the following. . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 2003/XP</td>
<td>From the Start menu, choose Programs &gt; Progress &gt;</td>
</tr>
<tr>
<td>UNIX</td>
<td>OpenEdge &gt; BP Server &gt; BP Servers &gt; Start Business</td>
</tr>
<tr>
<td></td>
<td>Process Server if you are using the installation</td>
</tr>
<tr>
<td></td>
<td>machine (For Windows only). Otherwise enter</td>
</tr>
<tr>
<td></td>
<td><a href="http://machine_name.domain.com:port_number/sbm/bpmportal/login.jsp">http://machine_name.domain.com:port_number/sbm/bpmportal/login.jsp</a></td>
</tr>
<tr>
<td></td>
<td>in your browser.</td>
</tr>
</tbody>
</table>

The Login page is displayed as shown in Figure 4 on page 27.
2. Type your **User Name** and **Password**
3. Click **Login**.

Business Process Portal displays the **Task List** page. As a typical Application User, you will have access only to the Home module. Other modules to which you may have access are displayed along with Home, as additional tabs depending on your user type and user permissions.

**Tip:** You can change your password any time by using **Home > Profile**.

---

**Enabling multi-tab support**

By default, Business Process Portal does not support multi-tab browsing. So, after having logged into the Portal, if you try to login again from another tab in the browser, the first instance of the Portal becomes invalid. This might causes several unexpected issues.

To avoid any such issues, you must enable the multi-tab support for Business Process Portal by adding the following line of code to the `bpmportal.conf` file at `$DLC/oebpm/server/conf/` location:

```
bpmportal.relogin.or.continue = true
```

This ensures that whenever you try to open the Business Process Portal, you are directed to any active session of the Portal, if available.

---

**Using themes**

Business Process Server provides five predefined themes for Business Process Portal and for applications in the portal. Your Business Process Server administrator can select one of them. For more details, see *Customization Guide*. 
Exploring Business Process Portal

When you log in to Business Process Portal for the first time, you can see the default Home tab, with the **My Task** page listing tasks assigned to you.

**Note:** Use the Profile menu to select the language you prefer and use the Preferences menu to select a filter that sets the page’s display. After configuring the Home tab, your selections are displayed the next time you log in to Business Process Portal.

Business Process Portal page layout

The terminology used for a typical **Business Process Portal** page is explained below. The following table describes the screen terminology used for Business Process portal.

**Table 4: Business Process Portal page terminology**

<table>
<thead>
<tr>
<th>User interface elements</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global links</td>
<td>Located at the top right corner of every page such as Support or Help, these links are available at all times during the session. It also displays the welcome message for the user who has logged in.</td>
</tr>
<tr>
<td>Module tabs</td>
<td>For your convenience, features of different modules are grouped in sections. All features of a particular group are located in its own Module tab.</td>
</tr>
<tr>
<td>Module menus</td>
<td>Each tab has a set of specific menus. At the right side, a welcome message is displayed to the user.</td>
</tr>
<tr>
<td>Page name</td>
<td>This shows the current page name.</td>
</tr>
<tr>
<td>Link trail</td>
<td>This shows the pages you navigated through to reach the current page. You can click any link in the link trail and go back to that page. If you click a link in the link trail without first saving contents of the current page, then the data in the current page is not saved.</td>
</tr>
</tbody>
</table>
User interface elements | Description
--- | ---
Workspace | Your data is displayed in this area. Generally it is displayed in one of the following ways:

- **Form**: This lets you interact with the portal. Typically, forms contain text boxes, check boxes, and options that help you enter data. Forms can be in read-only or editable mode depending upon the contents and access privileges.

- **List**: This lets you view your data in a tabular format. Typically, lists contain filter bars, search options, and page controls that manage which data is displayed and how it should be displayed.

Command buttons and Links: | The commands that help you interact with the data are represented by buttons. Buttons that help you accomplish some task but do not change the data values are typically located below the link trail. The links (for instance, My Collaborative Tasks and Next Available Task) are located above the workspace, on the right side. Buttons that operate on the data (for instance, Complete and Reassign) shown in the current page and change their values, are located below the workspace.

---

**Business Process Portal keyboard shortcuts**

Business Process Portal provides the following keyboard shortcuts to access its various module menus and menu options.

**Shortcuts**

The following table lists the keyboard shortcuts available in Business Process Portal.

**Table 5: Keyboard shortcuts**

<table>
<thead>
<tr>
<th>Module</th>
<th>Keys</th>
<th>Menu / Menu option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>CTRL+SHIFT+T</td>
<td>My Tasks</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+M</td>
<td>My Instances</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+S</td>
<td>Applications</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+D</td>
<td>Dashboard</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+O</td>
<td>Profile</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+F</td>
<td>Preferences &gt; Filters</td>
</tr>
<tr>
<td>Management</td>
<td>CTRL+SHIFT+I</td>
<td>Overview &gt; Instances</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+A</td>
<td>Overview &gt; Applications</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+R</td>
<td>Reports &gt; My Reports</td>
</tr>
<tr>
<td>Module</td>
<td>Keys</td>
<td>Menu / Menu option</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------------</td>
<td>--------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+N</td>
<td>Instance Manager &gt; Instances</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+K</td>
<td>Instance Manager &gt; Tasks</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+W</td>
<td>Instance Manager &gt; Worksteps</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+C</td>
<td>Balanced Scorecard &gt; Console</td>
</tr>
<tr>
<td>Administration</td>
<td>CTRL+SHIFT+V</td>
<td>System &gt; Log Viewer</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+U</td>
<td>User Management &gt; Users</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+G</td>
<td>User Management &gt; Groups</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+Q</td>
<td>User Management &gt; Queues</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+P</td>
<td>User Management &gt; Permissions</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+E</td>
<td>User Management &gt; Delegate Settings</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+L</td>
<td>Applications &gt; BP Server</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+Z</td>
<td>Applications &gt; BPM Webflow</td>
</tr>
</tbody>
</table>

You can customize these shortcuts by adding a new one or changing an existing one as per your requirement. For more details, see the *Customization Guide*.

**Using filter bars**

A filter allows you to reduce clutter and focus on the relevant data by displaying only selected data in the workspace.

**To apply a filter using the Filter bar:**

1. Specify values by either entering text in the provided text boxes or selecting them from the lists.  
   *Figure 5 on page 30.*
2. Click **Search**.

The combination of these values forms a filter.

**Figure 5: Filter bar**
Global filters

Business Process Server now provides global filters for most common filtering conditions. They are:

Filter names

• Overdue Tasks
• Tasks Due Today
• Tasks Due This Week
• Tasks Due This Month
• Tasks Due This Quarter
• Tasks Due This Year
• Critical Priority Tasks
• High Priority Tasks

Note: You can select a global filter as your default filter from the Home > Profile menu. Alternately, you can use it as required.

Sorting a column

In the Home module, a downward pointing triangle beside the column header indicates that the listed items can be sorted on that column header.

To sort a column:

1. Click the column to display the sorting options.

   Refer Figure 6 on page 31.

   Figure 6: Sorting options - Task list page

2. Choose the required sorting option.

   • A downward pointing triangle beside the column header indicates that the items are sorted in descending order. To sort them in ascending order, click the column header again.
   • An upward pointing triangle beside the column header indicates that the items are sorted in ascending order.
Note: From the Sorting options, you can choose only the required columns to be displayed and thus you can reduce the screen clutter.

The column sorting operation is performed differently in the Management and Administration modules.

- A column header is underlined only when you move the mouse over the column name.
- In the Management and Administration modules, if a column header is underlined, then you can click it to sort the listed items on that column header.

Refer Figure 7 on page 32.

Figure 7: Column sorting

Grid Search

The Grid Search Text toolbar will allow you to search and highlight the given text in the current page of the grid. And this is enabled for all portal grids.

Figure 8: Grid Search Text

- The grid searching is done locally and there will not be any remote call for it.
- The ‘Grid Search Text’ toolbar is available next to the paging toolbar of the grid by default.
- The ‘Grid Search Text’ toolbar will be refreshed on the following actions.
  - Reloading or refreshing the page.
  - While paging the grid.

Grid Toolbar Fields

- Text box
  
  You can enter the search text in this field. The search functionality is executed on every change of this text box, so that it is not required to click search for start the searching process. All the occurrences of the given text are highlighted and the row containing the first occurrence is selected by default. A ‘clear’ button is displayed beside the text box which enables you to clear the text box. By default, this text box supports regular expressions. Therefore, if your search conforms with the regular expression syntax, then Business Process Portal considers it as a regular expression, and searches accordingly.

- Previous Row and Next Row Buttons
These buttons are enabled only when given text is found in the grid, otherwise they are disabled. These buttons help you to navigate and select one of rows which is highlighted. Tool tips are configured to indicate the use case of these buttons.

- Match Case check box
  You can use the ‘Match Case’ check box to enable case-sensitive search. By default, this check box is unchecked.

- Status Bar
  The ‘Status Bar’ displays the number of occurrences or matches found. The icons ‘status OK’ and ‘error status’ indicate the status of the search.

**Rearranging column order**

You can change the order in which the columns are displayed as per your requirement.

**To change the order of columns:**

Drag the column header and drop it on the column header which should succeed the selected column.

The new position of the selected column is indicated by two arrows.

Whether a particular position is permissible or not is indicated by green check mark on the selected column.

Refer Figure 9 on page 33.

**Figure 9: Rearranging column order**

![Rearranging column order](image)

**Note:** You can change the order of columns in this way only in the Home module.

**Navigating through the list**

The paging controls allow you to navigate through pages of the current list. These controls are located immediately above and below the list.

The number of items to be displayed per page is specified by the Business Process Server administrator in the Administration module. For more details, refer to the "Using the Portal Configuration Interface" section of the *Business Process Portal Administrator’s Guide*. If the total number of items cannot be displayed in a page, then the exceeded items are displayed on the subsequent pages.

Refer Figure 10 on page 34.
Navigating through the pages in Home Module:

- **First Page** control displays the first page
- **Previous Page** control displays the previous page
- **Next Page** displays the next page
- **Last Page** displays the last page
- You can directly display a particular page by specifying its page number in the **Page** text box and pressing the Enter key.

You can click the **Refresh** control to reload the current page.

The top right corner of the list shows the item numbers displayed on the current page out of the total number of items.

The paging controls in the Management and Administration modules are different.

Refer Figure 11 on page 34.

**Figure 11: Paging control**

In the Management and Administration modules, if the number of pages are 10 or less, then all page numbers up to the last page are displayed below the list.

Navigating through the pages in Management and Administration modules:

- You can click a page number to display the corresponding page.
- If the number of pages is more than 10, then, click
  - **Next** helps to access the set of next 10 pages.
  - **Previous** helps to access the set of previous 10 pages.
- The total at the far right of the paging controls represents the total number of items in the list across all pages.

**Drilling down**

If more information is available about an item in the list, then such an item is displayed with a hyperlink.

You can click the hyperlink to drill down to the next level of data and view details of that item.

Refer Figure 12 on page 35.
Selecting and clearing rows

To select and clear rows:

1. Perform either of the following to select rows:
   - You can select one or more rows of items from the list of items displayed on the current page by clicking their respective check boxes in the first column.
   - To select all rows in the current page, select the check box in the header row.

   Selected rows are indicated by different color.

   Refer Figure 13 on page 35.

   Figure 13: Rows

2. Perform either of the following to clear rows:
   - To clear a particular row, click its check box again.
   - To clear all rows uncheck the header row, all selected rows in the page are cleared.
Printing

The Print icon (-print-) displays the contents of the current page in a printable format. You can use your browser’s print feature to print it.

Getting support

If you do not find the solution to your problem in the product documentation, then you can contact the support team.

To contact Progress OpenEdge support team:

1. Click Support from the global links.
   
   Your default mail tool is launched to send a mail to the support team.

2. Add your query and send the mail.

Accessing help

You can access online help from the global links.

To access online help:

• Click Help from the global links.

The help is launched in a separate browser window.

Business Process Portal provides context-sensitive help, displaying the help topic that is relevant to the current module.

Finding Business Process Server details

You can find out details about the Business Process Server using, About from the global links.

To view Business Process Server details:

• Click About from the Global links.

It displays the following details about Application Server, Database Type, Database Version, Business Process Server Version, and Build number in a pop-up window.

You need this information while contacting our support team.

Logging out of Business Process Portal

You can log out of the Business Process Server using the global links.
To quit Business Process Portal:

- Click **Logout** on the global links.

After a successful logout, Business Process Portal automatically displays Business Process Portal **Login** page.
Basic Operations

This chapter explains the basic operations you can perform while using Business Process Portal. You can perform some or all of these operations in various Business Process Portal screens. However, all these operations may not be available in each Business Process Portal screen. For details, see the following topics:

- Specifying a Date
- Searching Users
- Searching Group
- Working with attachments

Specifying a Date

You can specify a date by typing it in the various text boxes involving a Date (for example, Due Date, Start Date, End Date) or select using Select Date icon, which is generally located beside the Date text box.

To specify a date using Select Date icon, perform the following:

1. Click the Select Date icon (📅) beside the Date box.
   
   For a blank Date box, the Select Date window displays the current month’s calendar and by default, highlights today’s date and the current time.
   
   Refer Figure 14 on page 40.
2. You can select a date by performing one or more of the following operations from Select Date dialog:

- To select a date from the displayed month, click the desired date. To select today’s date, click Today.
- To display the calendar for another month, use the single arrows provided above the days of the week. Click the arrow pointing right for the next month, or the arrow pointing left for the previous month. Alternatively, to select any other month, you can click and hold the mouse on either of the arrows and then drag it to the desired month.
- Similarly, to display the calendar for another year, click the double-arrow pointing right for the next year, or the double-arrow pointing left for the previous year. Alternatively, to select any other year, you can click and hold the mouse on either of the double-arrows and then drag it to the desired year.
- To change the default time, click the hour and minute boxes in the Time section, to increment the value by 1 unit. Alternatively, to decrement the value, hold down SHIFT and then click the respective boxes. To change the value by multiple units, point to the respective boxes and then drag to the right to increment or to the left to decrement the value.

3. Select time from the Time drop down.

The selected date and time is displayed in the Date box.

**Note:** By default, the Select Date window displays the calendar with each week starting Sunday. To change this setting to another day of the week, click the day in the calendar header.

# Searching Users

You can specify a user by typing it in the various text boxes involving a users (for example, User Name, Reassign, Delegated to) or select using Select User icon, which is generally located beside the User text box.

**To search a user using Select user icon, perform the following:**

1. Click the Search User icon (🔍) is displayed beside the text box.
   
   **Search Users** page is displayed where you can search for the users.
   
   Refer Figure 15 on page 41.
2. You can select a user by performing one or more of the following operations from Select User page.

- You can search for the users by specifying either the user name, or the first name or the last name. If you specify the group name, then it searches for the users in that group, otherwise it searches in all groups.

- After typing the user name, first name, last name, and optionally, group, click Go. You can also use the * as a wild card. Type in the first letter and then the asterisk (example, a*) and all users beginning with that letter will display. It also works for portions of names; e.g., type in *son and all names ending in son (Jackson, Peterson, etc.) is displayed. Type Mc*son and users such as McPherson and Mcwilliamson is displayed.

Business Process Portal lists all the users satisfying your search criteria. You can navigate through this list as explained in the Getting started on page 25.

- To go directly to the list of users starting with a particular letter, click that letter in the Quick Search bar.

3. Depending on the page and current operation, Business Process Portal allows you to select one or more users. Select users by clicking the options in the first column of those users, and then click Add.

The selected users’ user names are entered in the User Name text box.

**Note:** Depending on the page and current operation, the Save and Create New button may also be available. Click this button to add the current user and continue adding more users.

**Searching Group**

Searching for a group is similar to searching for a user. While searching for a group, you need to specify the group name in the Group Name box by typing it. Alternatively, use the Search Bar to locate the specific group by performing a procedure similar to the one explained above for searching the users.
Working with attachments

Business Process Portal enables you to attach, update, and remove documents associated with entities such as tasks. For instance, you can use this feature to circulate a resume as a part of a hiring review process, or to circulate one or more functional specifications associated with a design approval process.

The ability to attach documents is not part of every task. The application must be designed to enable this feature, that is, it must employ Document dataslots for working with attachments.

Note: The ability to attach documents is not part of every task. The application must be designed to enable this feature.

Attachment options
The Business Process Server allows you to attach documents using the JavaScript interface.

Your ability to attach, update, and remove documents depends on the type of workstep that stores the document. The possible cases are summarized in the following table:

Table 6: Attachment Update Options

<table>
<thead>
<tr>
<th>If the attachment is . . .</th>
<th>You can . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read-only</td>
<td>View attached documents, but you cannot attach new documents, nor can you delete or update existing attached documents. You can, however, save a copy on your computer.</td>
</tr>
<tr>
<td>Read/write</td>
<td>Attach, remove, and update documents.</td>
</tr>
</tbody>
</table>

Whether an attached document is in read-only or read/write mode, depends upon the settings specified while defining the document dataslot. For more information, see the Application Developer's Guide.

Supported file types
You may attach any kind of file (.doc, .xls, .pdf, .gif, .html) as long as the file is located in your computer. When you open an attachment, BPM Portal lets the browser identify the associated application.

Note: The default setting for document attachment size is 5 MB. In the `OEBPS_HOME\conf\bpmportal.conf` file, you can increase the default document attachment size to 300 MB.
Introducing the Administration module

The Administration module allows you to control the operation of Business Process Server, install and uninstall applications, and manage all users and groups. This chapter describes how to start the Business Process Server servers, log into and out of Business Process Portal, explore the Administration interface, and stop the Business Process Servers. For details, see the following topics:

- Starting all servers
- Starting individual servers
- Single sign-on in Business Process Portal
- Running Business Process Server as a Windows service
- Customizing Business Process Server
- Exploring the Administration module interface
- Accessing Business Process Server components
- Suspending/Resuming individual Business Process Servers
- Stopping individual Business Process Servers
- Logging out of Business Process Portal
- Stopping all servers
Starting all servers

To start Business Process Portal with JBoss start the EJB server first, then the Portal server, and finally the Business Process Server.

Starting all servers in Windows

The order in which you must start the servers for Business Process Portal, is different for JBoss. You must start the servers in the specified order to start Business Process Portal.

Starting JBoss server

To start all the Business Process Servers with JBoss as your application server using Windows, follow the step:

1. From the Start menu, choose Programs > Progress > OpenEdge > BP Server > App Servers > Start Portal Server.
   This procedure may take some time. Wait until the server starts before proceeding to the next step.

2. From the Start menu, choose Programs > Progress > OpenEdge > BP Server > BP Servers > Start Business Process Server.
   Wait until the servers start before you log in to Business Process Portal.

Starting all servers in UNIX

To start Business Process Portal with JBoss start the EJB server first, then the Portal server, and finally the Business Process Servers.

For systems with X-Windows server

If your system supports X-Windows server:

1. Ensure that the DISPLAY environment variable is set properly in the shell where the portal server starts from.

2. Enter `setenv DISPLAY <machine_name>:<number>` to set the environment variable before starting the servers.
For systems without X-Windows server

If your system does not support X-Windows server:

If the DISPLAY variable is not set for it, then you should modify the `startPortalServer.sh` and add the property `-Djava.awt.headless=true` as shown in the following example, to start the portal server in headless mode.

```
VMARGS=$JAVA_OPTIONS" -Djava.awt.headless=true ..."
```

Tip: Make sure the server processes do not exit when you logout or disconnect.

Important: Complete each command before executing the next one.

Starting JBoss in Unix

To start the Portal, EJB, and OEBPS servers for JBoss, enter the following:

```
cd OEBPS_HOME/JBoss/bin
./startEjbServer.sh
./startPortalServer.sh
```

Starting individual servers

In Windows, you can start Business Process Servers from the start menu without using Business Process Portal or the Administration module of Business Process Portal.

Starting Business Process Server from Windows

To start Business Process Server:

- Start the BP Server from the Windows Start menu by choosing Programs > Progress > OpenEdge > BP Server > BP Servers > Start Business Process Server.

The Business Process Server is started.

Starting Business Process Servers from Administration

You can start the Business Process Servers from the Administration module also.

To start Business Process Servers from the Administration module:

1. Click Administration to open the System Status page, the start page of the Administration module.
It displays the current status of various servers used by Business Process Server.

2. To start the BP Server and BPM Events Server, if they are not running, select the corresponding check boxes and then click **Start**.

Business Process Portal starts the selected servers and updates the **System Status** page.

*Figure 16: Starting the Business Process Servers*

Using the application server Admin Console

Optionally, you may obtain application server status for JBoss from Windows as follows:

- For JBoss, from the Start menu, choose **Programs > Progress > OpenEdge > BP Server > Admin Consoles > Business Process Console**. Enter the user name "guest" and the password "guest".

**Note:** For the application servers the userid and password provided are default user details. You can provide valid user details.

Single sign-on in Business Process Portal

Business Process Server provides the BPM Sign-on API servlet, which provides a single sign-on capability to other portals that are configured to work with BPM Sign-on API. In Business Process Server, BPM Sign-on API enables users to log into the Home module of Business Process Portal, and then open other modules in Business Process Portal to which they have been granted access, without having to log in again. With BPM Sign-on API, you do not have to log in to each configured module separately.

The BPM Sign-on API servlet uses the user name and password information from the **Login** page to create a session and redirects the user to his/her Home page. Subsequent references to all the modules of Business Process Portal pass through the BPM Sign-on API servlet, which first verifies if the user session is valid and then redirects the user to the selected module or feature.
Accessing Administration module

After starting the servers, you can log into Business Process Portal. For more details, see Logging in to Business Process Portal on page 26.

To access Administration module:

1. Click the Administration tab.
   
   Business Process Server automatically authenticates your user name and password and displays the System Status page, as shown in Starting Business Process Servers from Administration on page 45.

2. Click the View System Status Details link to view the details of each server.

   Note: Business Process Server’s Access Control Management feature displays an error message, if you were not granted permission to use this or any other module.

To access features in the Administration module, use appropriate module menus.

To access other Business Process Server modules that are available to you, click a module tab to display a range of menus under that tab. Click a menu and select a submenu item to open the feature.

   Note: Once you log in to Business Process Portal, no further authentication is required when you click a new module.

Running Business Process Server as a Windows service

You may run Business Process Server as a Windows service in JBoss application server. For more information, see “Installing Business Process Server as a Windows Service” section in the OpenEdge Getting Started: Installation and Configuration Guide.

Customizing Business Process Server

Business Process Server provides you the resources to customize Business Process Server components. Customization enables you to make changes to suit your requirements, make Business Process Server more flexible, and consistent with your corporate identity. This in turn reduces the learning curve and thereby increase the productivity. For more information, refer to Customization Guide.
Exploring the Administration module interface

The basic elements of the interface for the Administration module are same as that of the Home module. The basic operations you must perform while using the Administration module are also the same as those performed while using the Home module. This information is covered in Getting started on page 25 and Basic Operations on page 39.

**Note:** The tabs, menus and corresponding submenus you see in Business Process Portal Navigation bar depends on the permissions granted with the ACLManager feature. See Managing access control on page 185 for more information.

**Module tabs**

You may see one or more of the following module tabs, depending on your access control permissions:
- Home
- Management
- Administration

The Administration module contains the following menus:
- **System** — Enables you to startup, shutdown, and reconfigure the Business Process Server servers and modules.
- **User Management** — Enables you to manage Business Process Server users, groups, queues, and permissions.
- **Applications** — Enables you to manage BP Server and BPM Webflow applications, and Web services.

Each module tab contains several module menus. Click each module menu to view its submenu options. You may access the resources listed in each submenu.

Accessing Business Process Server components

The following table describes how to open Business Process Portal modules and other Business Process Server components on both Windows and UNIX:

**Table 7: Accessing Business Process Portal modules and Business Process Server components**

<table>
<thead>
<tr>
<th>To open . . .</th>
<th>Perform the following . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>Progress Developer Studio for Openedge</td>
<td>On Windows from the Start menu: Choose Programs &gt; Progress &gt; OpenEdge &gt; Progress Developer Studio 3.7 for OpenEdge. The Progress Developer Studio for OpenEdge window appears.</td>
</tr>
<tr>
<td>To open . . .</td>
<td>Perform the following . . .</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Business Process Server Admin       | **On Windows from the Start menu:** Choose Programs &gt; Progress &gt; OpenEdge &gt; BP Server &gt; Admin Consoles &gt; Business Process Server Console  
Or in Windows Explorer:  

`%OEBPS_HOME%/bin\StartBPServerAdmin.cmd`

**On UNIX:** Enter `OEBPS_HOME/bin` and `startBPServerAdmin.sh`. To create and install the process templates for the sample applications, enter the same commands used for BP Server Admin. |
| BPM Events Admin                    | **On Windows from Windows Explorer:**  

`%OEBPS_HOME%/bin\StartBPMEventsAdmin.cmd`

**On UNIX:** Enter `OEBPS_HOME/bin` and `startBPMEventsAdmin.sh`. |
| Home                                | **On Windows from the Start menu:** Choose Programs &gt; Progress &gt; OpenEdge 11.3 &gt; BP Server &gt; Start Business Process Portal, if you are using the installation machine. Otherwise, enter  

`http://machine_name.domain.com:port_number/sbm/bpmportal/login.jsp`

or  

`http://machine_name:port_number/sbm/bpmportal/login.jsp`

If you are accessing Business Process Portal from a client. Enter your user name and password. You log into Home.  

**On UNIX:** Enter  

`http://machine_name.domain.com:port_number/sbm/bpmportal/login.jsp`

in your browser. This initiates a login to the Home module. |
### Management

<table>
<thead>
<tr>
<th>To open . . .</th>
<th>Perform the following . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>On Windows from the Start menu: Choose Programs &gt; Progress &gt; OpenEdge &gt; BP Server &gt; Start Business Process Portal, then select the Management module if you are using the installation machine. Otherwise enter</td>
<td><a href="http://machine_name.domain.com:port_number/sbm/bpmportal/management/overview_all.jsp">http://machine_name.domain.com:port_number/sbm/bpmportal/management/overview_all.jsp</a> if you are accessing Management from a client. Enter your user name and password. This initiates a login to the Management module.</td>
</tr>
<tr>
<td>On UNIX: Enter</td>
<td><a href="http://machine_name.domain.com:port_number/sbm/bpmportal/management/overview_all.jsp">http://machine_name.domain.com:port_number/sbm/bpmportal/management/overview_all.jsp</a> in your browser. This initiates a login to the Management module.</td>
</tr>
</tbody>
</table>

### Administration

<table>
<thead>
<tr>
<th>To open . . .</th>
<th>Perform the following . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>On Windows from the Start menu: Choose Programs &gt; Progress &gt; OpenEdge &gt; BP Server &gt; Business Process Portal, then select the Administration module if you are using the installation machine. Otherwise enter</td>
<td><a href="http://machine_name.domain.com:port_number/sbm/bpmportal/administration/system_status.jsp">http://machine_name.domain.com:port_number/sbm/bpmportal/administration/system_status.jsp</a> in your browser if you are accessing the Administration module from a client. Enter your user name and password. This initiates a login to Administration, the main administration module for Business Process Server.</td>
</tr>
<tr>
<td>On UNIX: Enter</td>
<td><a href="http://machine_name.domain.com:port_number/sbm/bpmportal/administration/system_status.jsp">http://machine_name.domain.com:port_number/sbm/bpmportal/administration/system_status.jsp</a> into your browser. This initiates a login to the Administration module.</td>
</tr>
</tbody>
</table>

## Suspending/Resuming individual Business Process Servers

You can suspend/resume BP Server and/or BPM Events Servers from Business Process Portal only.

**To do this, perform the following:**

1. Click Administration to open the System Status page, the start page of the Administration module.
   
   It displays the current status of various servers used by Business Process Servers.

2. To suspend or resume the servers, perform the appropriate step.
   
   - To suspend the BP Server and/or BPM Events Server, select the desired server(s) and then click Suspend.
     
     Business Process Portal suspends the selected servers and updates the System Status page.
Stopping individual Business Process Servers

You can stop Business Process Servers from windows as well as Business Process Portal.

Note: If you stop the servers, then no process will run and portal client cannot access the servers.

From Windows

To stop Business Process Server from windows:

Stop the BP Server from the Windows Start menu by choosing Programs > Progress > OpenEdge > BP Server > BP Servers > Stop Business Process Server.

The BP Server is stopped.

From Business Process Portal

To stop Business Process Servers from Business Process Portal:

1. Click Administration to open the System Status page, the start page of the Administration module.

   It displays the current status of various servers used by Business Process Server.

2. To stop the BP Server and BPM Events Server, select them and then click Stop.

Business Process Portal stops the selected servers and updates the System Status page.

Logging out of Business Process Portal

Stopping all servers

To stop Business Process Portal, you must first Log out, and then for JBoss stop the Business Process Servers first, followed by the EJB server, and then the Portal server.

**Note:** Always stop the servers using the appropriate command; do not kill the servers.

Stopping in Windows

The order in which you stop all the Business Process Servers is different for JBoss. You must stop the JBoss server before you stop all the Business Process Servers.

**Stopping Business Process Portal servers in JBoss server for Windows**

To stop all the Business Process Servers with JBoss using Windows, complete the following:

1. From the Start menu, choose **Programs > Progress > OpenEdge > BP Server > BP Servers > Stop Business Process Server**.
   
   You may also stop the Business Process Servers individually by selecting them, and then clicking **Stop** in the **System Status** page of the Administration module, or by running the `stopOEBPS` utility in `OEBPS_HOME/bin`.
   
   Wait until the servers stop before proceeding to the next step.

2. From the Start menu, choose **Programs > Progress > OpenEdge > BP Server > App Servers > Stop Portal server**.
   
   This procedure may take some time. Wait until the server stops before proceeding to the next step.

Stopping in UNIX

To stop Business Process Portal for JBoss, you must log out, then stop the Business Process Servers first, next the EJB server, and then the Portal server.

**Important:** Complete each command before executing the next one.

**Stopping Business Process Portal servers in JBoss for Unix**

To stop the Portal, EJB, and OEBPS servers for JBoss, enter the following:

```
cd OEBPS_HOME/bin
./stopOEBPS.sh
```
Signed applets

Business Process Portal uses signed applets to perform some operations. A Business Process Server User's user account in the Operating System needs to have permissions to approve the use of these signed applets. However, if your organization's policy does not allow you to grant such permissions, then you can adopt one of the following strategies to allow a user to use signed applets without compromising the security.

Modifying the java.policy file

Perform the following in java.policy file:

1. On each user machine, modify the java.policy file in the <JRE_Install>\lib\security directory and add the lines to grant permissions to run Business Process Server applets.
   
   For example:

   ```
   grant codeBase "http://<host_name>:<port_number>/sbm/bpmportal/applet/" { permission java.security.AllPermission; };
   ```

2. Please note that if you change the Business Process Server location, then you must update all users' java.policy files with the new server location.

Modifying the java.security file

Perform the following in java.policy file:

1. On each user machine, modify the java.security file in the <JRE_Install>\lib\security directory and add the lines to point to the java policy file.
   
   For example:

   ```
   policy.url.3=http://<host_name>:<port_number>://applet.policy
   ```

2. This policy URL should be a static location pointing to a remote policy file as a source of java security policies.

3. This java policy file (in this case, applet.policy) should contain the lines to grant permissions to run Business Process Server applets. For example:

   ```
   grant codeBase "http://<host_name>:<port_number>/sbm/bpmportal/applet/" { permission java.security.AllPermission; };
   ```

4. In this case, if you change the Business Process Server location, then you must update the java policy file (in this case, applet.policy) only on the static server instead of every user machine.
Configuring Business Process Server

The Business Process Server Administration module enables you to fine-tune the performance of your system using configuration files. This chapter explains how to configure Business Process Server using Business Process Portal’s Administration module, and describes the Secure Socket Layer (SSL) for security purposes.
For details, see the following topics:

• Using the OEBPS configuration interface
• SSL security for Business Process Portal modules

Using the OEBPS configuration interface

Business Process Server stores the configuration parameters for various Business Process Server modules, as well as for its overall operation, in various .conf files, located in the OEBPS_HOME\conf directory. Business Process Server provides a simple interface that allows you to change the parameters of a selected module. To see additional parameters that are not visible in the interface, refer to the respective .conf file.

Updating OEBPS configuration

To update OEBPS configuration, perform the following:
1. In the Administration module, click System > Configuration > General, to view the OEBPS Configuration page.

This page displays your current configuration settings for Business Process Server.

An example of this page is shown in the following figure.

Figure 17: Using the OEBPS configuration page

2. You can scroll through the listed parameters and modify values, as required.

Refer to Table 8 on page 56 for a description of the parameters.

3. Click Save.

Business Process Server updates the configuration after your confirmation.

Available configuration parameters in Business Process Portal

The following table presents the configuration parameters for Business Process Server and a description of its usage, along with default values, if appropriate.

Business Process Server configuration

Table 8: Business Process Server configuration

<table>
<thead>
<tr>
<th>Configuration name</th>
<th>Default value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Day Start Time</td>
<td>9</td>
<td>The start of the business day (using a 24-hour clock).</td>
</tr>
<tr>
<td>Business Day End Time</td>
<td>17</td>
<td>The end of the business day (using a 24-hour clock).</td>
</tr>
<tr>
<td>Configuration name</td>
<td>Default value</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Holidays</td>
<td>None</td>
<td>Specifies a comma-separated list of holidays to exclude when performing business time calculations. Format: &lt;month as a string&gt; &lt;day as an integer&gt; &lt;year as an integer&gt; Example: Jan 4 1999, Mar 10 1998, Apr 29 1997</td>
</tr>
<tr>
<td>SMTP mail server port</td>
<td>25</td>
<td>The port number of the SMTP mail server for outgoing e-mail.</td>
</tr>
<tr>
<td>SMTP mail server sender e-mail address</td>
<td><a href="mailto:mail@apac.progress.com">mail@apac.progress.com</a></td>
<td>Where the e-mail address broadcast reports are sent from.</td>
</tr>
<tr>
<td>SMTP mail server sender email address</td>
<td><a href="mailto:oebpsadmin@apac.progress.com">oebpsadmin@apac.progress.com</a></td>
<td>The email address broadcast reports are sent from.</td>
</tr>
<tr>
<td>SMTP charset</td>
<td>iso-8859-1</td>
<td>SMTP character set to be used.</td>
</tr>
</tbody>
</table>

**Note:** To customize the date format, you must specify the new date format using the `Date_Format` parameter in the `bpmportal.properties` and to display the seconds field in the `DateTimeTZ` field in BPM Portal, the value `hh:mm` should be changed to `hh:mm:ss in the bpmportal.properties file in the Portal.TimeOnlyFormat and DateFormat fields.`

**Note:** To customize the language specific properties file; for example, for English, you must specify it in the `bpmportal_en.properties` file.

### SSL security for Business Process Portal modules

Business Process Server relies on the Secure Socket Layer (SSL) protocol to provide secure connections for Business Process Portal modules. SSL provides server authentication, data encryption, and message integrity. With SSL implemented on both client and server, your Internet communications are transmitted in encrypted form, so that information arrives unaltered at the specified server. Generally, Business Process Server allows dual types of connections across all its portal modules (Home, Management and Administration). For example, a user logs into Administration using HTTPS protocol, while another user logs in non-securely using HTTP protocol:

- `https://<hostName>:<HTTPS_PortNumber>/...`
- `http://<hostName>:<HTTP_PortNumber>/...`

No adjustment is required on your part as switching between these two connection types is the user’s choice at the Web browser level. The default protocol is selected during Business Process Server installation, which forces the connection type for Business Process Server menu shortcuts only.

Business Process Server uses the SSL protocol as part of the Web server to enforce a high level of security in addition to the login and password security features in Business Process Portal modules.
SSL security Features

SSL security is common for Business Process Portal modules accessible through the Web, such as Home, Management, and Administration.

Safeguarding features

To guard against the previously listed threats, SSL protocol provides several safeguarding features:

• **Confidentiality.** Guaranteed through encryption, the process of disguising information so that it can’t be deciphered by anyone but the intended recipient.

• **Integrity.** Ensured through encryption.

• **Authentication.** Provided through digital authenticity certificates, which are very difficult to falsify.

The Business Process Portal modules support a secure connection for users who request it. If the user connects to Business Process Server by typing the URLs, then SSL protocol provides security which is embedded in the Web server at the URL level. For example, enter:

```
https://<hostName>:<SSLportNumber>
```

Instead of:
```
http://<hostName>:<portNumber>
```

In general, the Business Process Server menu provides the right link whether the connection is secure or not.

**Note:** SSL availability depends on the application server.

You must configure your application server to avail its SSL security features. The exact procedure to configure it varies from server to server. Please refer to your application server documentation for this procedure.

Securing network communication between Business Process Server components

Business Process Server supports RMI over IIOP (RMI/IIOP) protocol to communicate between EJB and portal components. This protocol is not encrypted. To make the network communication more secure by encryption, RMI over IIOP can be sent through SSL protocol. This technique is called RMI over IIOP over SSL (RMI/IIOP/SSL). SSL is standard industry protocol to provide authentication, non-repudiation and encryption functionality.

Business Process Server does not provide RMI/IIOP/SSL functionality but relies on J2EE compliant application servers to provide this functionality. Since RMI/IIOP/SSL is not a standard part of J2EE, this functionality may not be available to all application servers. Refer to your application server documentation on enabling this functionality.

RMI/IIOP is supplied via object request brokers (ORB). Security standards do not exist for interoperability between ORBs. When RMI/IIOP/SSL is enabled, a client ORB from one vendor will not work with a server ORB from another vendor.

For more information about RMI/IIOP/SSL for your application server, refer to your application server documentation.
Configuring BPM Webflow

BPM Webflow is a mechanism for process designers and application developers to develop more customizable, sophisticated interfaces for individual worksteps within their flow applications. This chapter explains how to configure BPM Webflow using Business Process Portal's Administration module.

For details, see the following topics:

- Using the BPM Webflow configuration interface
- Troubleshooting BPM Webflow configuration

Using the BPM Webflow configuration interface

Business Process Server stores the configuration parameters for BPM Webflow in the `bpmwebflow.conf` file, located in the `OEBPS_HOME\conf` directory. To see additional parameters that are not visible in the interface, refer to the `bpmwebflow.conf` file. You use the Administration module to configure these parameters using the interface presented in Figure 18 on page 60.

To update BPM Webflow configuration:

1. In the Administration module, click System > Configuration > BPM Webflow, to view the BPM Webflow Configuration page.

   This page displays your current configuration settings for BPM Webflow. An example of this page is shown in the following figure.
2. You can scroll through the listed parameters and modify values, as required. Refer to Table 9 on page 60 for a description of the parameters.

3. Click **Save**.

   Business Process Server updates the configuration after your confirmation.

---

**Configuration parameters for BPM Webflow in Business Process Portal**

The following table presents the configuration parameters for BPM Webflow, along with default values and a description of use.

**BPM Webflow configuration**

<table>
<thead>
<tr>
<th>Configuration name</th>
<th>Default value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BPM Webflow Root</td>
<td>%OEBPS_HOME%/BPMWebflow</td>
<td>The root directory for Web applications.</td>
</tr>
<tr>
<td>BPM Webflow task URL</td>
<td>/sbm/bpmportal/login.jsp</td>
<td>This is the URL for the BPM Webflow task. The pattern ${WebITEM_NAME} needs to be replaced with proper web item name.</td>
</tr>
<tr>
<td>UseXSL</td>
<td>True</td>
<td>Enables XSL support.</td>
</tr>
<tr>
<td>WSCode</td>
<td>True</td>
<td>Generates additional code. Required only when the application is invoked as a Web Service.</td>
</tr>
</tbody>
</table>
Troubleshooting BPM Webflow configuration

This section answers the most frequently asked troubleshooting questions about BPM Webflow configuration.

Table 10: Troubleshooting BPM Webflow

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What happens to the customized jsp files when I uninstall BPM Webflow?</td>
<td>The modified jsp files are copied to the jsp.bak subdirectory of the application.</td>
</tr>
<tr>
<td>Question</td>
<td>Answer</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| How can I save Java class files before or after publishing a BPM Webflow application? | If you published the BPM Webflow application, then save the class files in one of the following directories (AppServer refers to BP Server webapps directory):  
   - %AppServer%\sbm.war\bpmwebflow\common\classes  
   - %AppServer%\sbm.war\bpmwebflow\<Application Name>\classes  
   If the application was not published, then save the class files under the following directories:  
   - %OEBPS_HOME%\BPMWebflow\common\classes  
   - %OEBPS_HOME%\BPMWebflow\<Application Name>\classes  
   You may also save the files to the following directory:  
   - %AppServer%\sbm.war\WEB-INF\classes |
| Where are the log files generated?                                       | Logs are generated under %OEBPS_HOME%\logs\bpmwebflow.log or you may access the log viewer for BPM Webflow by clicking System > Configuration >Log Viewer and then by selecting the BPM Webflow option from the Log file to view list. |
Configuring Business Process Portal

The Business Process Portal enables users to interact with Business Process Server applications. You can interact with Business Process Server applications by using the Home, Management, and Administration modules. Out of these modules, you can configure the Home and Management modules using Business Process Portal's Administration module.

The Home module enables users to interact with Business Process Server applications. Home is a module in Business Process Portal that not only provides entries to various tasks and applications, but also supplies links to all supporting resources required to complete these tasks including documents, external URLs, as well as additional applications and services. Home is the application user's primary interface to Business Process Server.

The Management module in Business Process Portal enables managers to query, report, and control processes and resources. As the primary interface for the business manager, the Management module allows you to define, view, query, and analyze management data in the form of reports, graphs, and spreadsheets, to name a few. For example, the Management module allows business managers to query and select current active processes based on their state and attributes; and supports dynamic modification of business policies and priorities.

This chapter explains how to configure Portal using Business Process Portal's Administration module and offers answers to the most frequently asked questions about troubleshooting configuring Business Process Portal.


For details, see the following topics:

- Using the Business Process Portal configuration interface
- Troubleshooting Business Process Portal configuration
Using the Business Process Portal configuration interface

Business Process Server stores the configuration parameters for the Home module in the bpmportal.conf file, located in the OEBPS_HOME/conf directory. You use the Configuration interface in the Administration module to configure these parameters. To see additional parameters that are not visible in the interface, refer to the bpmportal.conf file.

To configure Business Process Portal using the Configuration interface in the Administration module:

1. In the Administration module, click **System > Configuration > Business Process Portal**, to view the **Business Process Portal** page.

   This page displays your current configuration settings for the Home module.

   An example of this page is shown in the following figure.

   **Figure 19: Using the Business Process Portal configuration page**

2. You can scroll through the listed parameters and modify values, as required.

   Refer to **Table 11** on page 65 for a description of the parameters.

3. Click **Save**.

   Business Process Server updates the configuration after your confirmation.

**Configuration parameters for Business Process Portal**

**Table 11** on page 65 presents the configuration parameters for Business Process Portal, a description of use, along with default values, if appropriate.
### Business Process Portal configuration

**Table 11: Business Process Portal configuration**

<table>
<thead>
<tr>
<th>Configuration name</th>
<th>Default value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Size For Document Uploads</td>
<td>5</td>
<td>The size limit for uploaded documents, specified in megabytes. Note that you can specify only integer values for size.</td>
</tr>
<tr>
<td>Business Process Portal page size</td>
<td>15</td>
<td>Specify the number of entries in Business Process Portal page. This should be between 1 and 50 (both inclusive)</td>
</tr>
<tr>
<td>Caching of API Templates</td>
<td>False</td>
<td>When this value is enabled, all templates used by the Home API are cached. This improves performance. However, when using this setting, restart the servlet engine/web server for any template changes to take effect.</td>
</tr>
<tr>
<td>Crystal Report Server URL</td>
<td>None</td>
<td>The URL of the Crystal Report server.</td>
</tr>
<tr>
<td>ReportBuilderApplet JAR files</td>
<td>processreportbuilder.jar, CalAndMaskField.jar</td>
<td>List of JAR files used by the ReportBuilder applet.</td>
</tr>
<tr>
<td>Report User Name</td>
<td>OpenEdge</td>
<td>The report engine user name</td>
</tr>
<tr>
<td>Report License Key</td>
<td>License number</td>
<td>The report engine license key.</td>
</tr>
<tr>
<td>Disable Confirmation Messages</td>
<td>False</td>
<td>Enables or disables confirmation pages for Business Process Portal. It is not applicable for JavaScript confirmation messages.</td>
</tr>
<tr>
<td>Flag to enable password security in portal</td>
<td>False</td>
<td>If this value is set to true, then password security is enabled in portal.</td>
</tr>
</tbody>
</table>
### Configuration name

<table>
<thead>
<tr>
<th>Configuration name</th>
<th>Default value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of class implementing the IPasswordSecurityData interface</td>
<td>com.savvion.sbm.bpmportal.security.PortalPasswordSecurityData</td>
<td>User should define the implementing class and specify the name here. Custom data handler can be created by extending the <code>com.savvion.sbm.security.password.IPasswordSecurityData</code> interface.</td>
</tr>
<tr>
<td>Name of class implementing the IPasswordSecurityService interface</td>
<td>com.savvion.sbm.bpmportal.security.PortalPasswordSecurityService</td>
<td>User should define the implementing class and specify the name here. Custom service handler can be created by extending the <code>com.savvion.sbm.security.password.IPasswordSecurityService</code> interface.</td>
</tr>
<tr>
<td>Flag to enable change password during first login</td>
<td>True</td>
<td>If the value is set to true, then the user is prompted with change password window during first login.</td>
</tr>
<tr>
<td>Duration in days after which the password for the user expires</td>
<td>30</td>
<td>Duration in days for which the password is valid. The value should be between 1 and 365, if set to -1, longevity will be infinite, that is the password never expires.</td>
</tr>
<tr>
<td>Number of days prior to password expiry to notify the user about password expiration</td>
<td>3</td>
<td>Specifies number of days before password expiry for notification. The value should be between 1 and 30, if set to -1, notifyexpiration is disabled, that is the user is not notified before password expiry.</td>
</tr>
<tr>
<td>Local Store for Task Page</td>
<td>False</td>
<td>When this value is enabled, task data is cached and also grid pagination and sorting is performed locally. This improves performance.</td>
</tr>
</tbody>
</table>

## Troubleshooting Business Process Portal configuration

Troubleshooting questions about the Home and Management modules in the Business Process Portal configuration are answered in the following sections.
Troubleshooting the Home module

This section answers the most frequently asked troubleshooting questions about the Home module in the Business Process Portal configuration.

Home module

Table 12: Troubleshooting the Home module

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>I cannot connect to Home.</td>
<td>Check that the Web server is running properly by typing http://&lt;machine_name&gt;:&lt;webserver_port_number.</td>
</tr>
</tbody>
</table>
| I cannot log in to Home.                                                 | 1. Check if the BP Server is running from the System page.  
2. Check if Business Process Server is running.  
3. Check whether the bpserver.conf configuration file is using LDAPRealm for authentication or not.                                                                                                                                                                             |
| I cannot see my applets when I try to run Business Process Server applications. | Check the version of your browser. The Release Notes contain information concerning the list of supported browsers.                                                                                                                                                                                                                       |
| When attempting to log in, I receive the message "Home concurrent user license limit exceeded." | When you install Business Process Server from the Installation CD, you are licensed for 15 concurrent Home sessions. Business Process Server counts each user logged in as using a single license; a user logged in multiple times using the same user name uses the corresponding number of licenses. A license remains in use until the user logs out. If the user forgets to log out, then the session expires after 360 minutes by default, and the license is available for use by someone else. To change the session time, see the next question below. If your organization needs to support a larger number of concurrent users, then contact Progress OpenEdge to add to your existing license. Progress OpenEdge will e-mail you a new binary license file that you can place in the OEBPS_HOME\conf directory. Restarting the Apache web server resets the licenses. |
| How do I adjust the instance display format in Home?                     | You may adjust the display of process instances in the Home Task list with one of three values: short, extended and tooltip. ‘Short’ presents the basic application template name. ‘Extended’ displays a longer name which includes information about parent applications if they exist. ‘Tooltip’ displays the short name, but provides additional information in pop-up form. To change the instance display format value, open the bpmportal.conf file and find the bpmportal.instance.display.format parameter and indicate short, extended or tooltip. |
| How do I change the time-out value in my system?                         | Please refer to your application server documentation.                                                                                                                                                                                                                                                                                               |
If you are using an evaluation version of Business Process Server, then contact Progress OpenEdge to upgrade to a full license.

This happens when the BP Server is down or not responding. Use the System menu in the Administration module to check the status of the Business Process Server.

Troubleshooting the Management module

This section answers the most frequently asked troubleshooting questions about the Management module in the Business Process Portal configuration.

Management module

Table 13: Troubleshooting the Management module

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>When attempting to log in, I receive the message &quot;Home license expired.&quot;</td>
<td>If you are using an evaluation version of Business Process Server, then contact Progress OpenEdge to upgrade to a full license.</td>
</tr>
<tr>
<td>When attempting to log in, I receive the message &quot;Can't find BP Server.&quot;</td>
<td>This happens when the BP Server is down or not responding. Use the System menu in the Administration module to check the status of the Business Process Server.</td>
</tr>
<tr>
<td>Ensure that in Internet Explorer the portal page gets loaded whenever you visit the webpage. You can set this using Tools menu, Internet Options, in that select Check for newer versions of stored pages &gt; Every time I visit the webpage. For more information check Internet Explorer documentation.</td>
<td></td>
</tr>
<tr>
<td>Removed: The process instance was removed and is no longer available to the user. Suspended: The process instance was stopped but can be reactivated.</td>
<td></td>
</tr>
<tr>
<td>When attempting to log in, I receive the message &quot;Management concurrent user license limit exceeded.&quot;</td>
<td>When you install Business Process Server from the Installation CD, you are licensed for five concurrent Management sessions. Business Process Server counts each user logged in as using a single license. A user logged in multiple times using the same user name uses the corresponding number of licenses. A license remains in use until the user logs out. If the user forgets to log out, then the session expires after 360 minutes, by default, and the license is available for use by someone else. To change the session time, see the next question below. If your organization needs to support a larger number of concurrent users, then contact Progress OpenEdge to add to your existing license. Progress OpenEdge will e-mail you a new binary license file that you can place in the \OEBPS_HOME\conf directory.</td>
</tr>
<tr>
<td>Question</td>
<td>Answer</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>When trying to get the Process Status Viewer, I receive an &quot;Internal Server Error&quot; after I click PI URL in BPM SQL report.</td>
<td>The Process Status Viewer requires four parameters to work properly: process template name, process template ID, process instance name, and process instance ID. The error occurs when the BPM SQL server does not select all columns (except for process instance name, where the URL link to the Process Status Viewer won’t show). Those parameters are supplied by the SQL query and are mapped to the following columns: <strong>process_template_name</strong>, <strong>process_template_id</strong>, <strong>process_instance_name</strong>, and <strong>process_instance_id</strong>.</td>
</tr>
<tr>
<td>When attempting to log in, I receive the message &quot;Business Process Portal Management license expired.&quot;</td>
<td>If you are using an evaluation version of Business Process Server, then contact Progress OpenEdge to upgrade to a full license.</td>
</tr>
<tr>
<td>Cannot generate a report.</td>
<td>Make sure the database server is still running and application is still accessible by the current user.</td>
</tr>
<tr>
<td>How do I change the time out value in my system?</td>
<td>That depends on your application server. Please refer to your application server documentation.</td>
</tr>
</tbody>
</table>
Configuring BP Server

As the Business Process Server administrator, you are responsible for loading business processes and maintaining BP Server. The BP Server executes the business process flow and provides the following components:

• BPM Process Store. An open repository of e-business information collected from different modules of Business Process Server as well as processing events and populating the Business Process Server system tables.

• Email Server. The location where BP Server stores e-mail account information and parameters.

• Event Publisher. The JMS-based framework used in BP Server for publishing events to a user defined queue or topic.

• BP Server Admin. The command line interface for administering BP Server.

This chapter explains the role of BP Server in Business Process Server and describes how to configure BP Server, BPM Process Store, Email Server, and Event Publisher using the Configuration interface in the Administration module of Business Process Portal. This chapter also describes how to publish BP Server applications using BP Server Admin and presents a list of commands along with a troubleshooting section.

Note: To install applications using the Administration module, refer to Managing applications on page 213 for more details.

For details, see the following topics:

• Understanding the role of BP Server

• BP Server property files

• Publishing BP Server applications
• Using the BP Server configuration interface
• Using the BPM Process Store configuration interface
• Using the email server configuration interface
• Using BP Server admin
• Troubleshooting BP Server configuration

Understanding the role of BP Server

BP Server is transparent to Business Process Server end users, who use Business Process Portal modules (Home, Management and Administration) as clients of BP Server. The Application Developer, on the other hand, uses BP Server for defining and creating the business processes. This requires knowledge of BP Server and its API in order to write the external performers and to integrate third party applications with Business Process Server.

Business Process Server Application Developers define the process and information flow for an application using Progress Developer Studio for OpenEdge, saving the process definition as a Business Process Template file (in SPT or XML).

BP Server property files

The following BP Server properties are found in the OEBPS_HOME\conf directory.

**oebpsjndi.properties.** Defines the properties of target application servers. For each application server, a set of properties is defined, such as initial_factory, provider_url, principal, credentials, jndi-prefixes, and others. The default application server and default JMS server names specified in the property file by the installer applies to the current installation.

This file also contains for JMS provider.

You can also use this file to specify for Local EJB or Remote EJB invocations. The format of the entries in this file is as follows:

```
<jndiName>=<fully qualified class name>
```

For example:

```
ejb/myJndiName=com.savvion.sbm.PurchaseOrder
testJndiName=com.savvion.sbm.PurchaseOrder
```

**oebpsdb.properties.** This file specifies the database properties of the target database set for the current installation. The name of transactional data source of BP Server, database user and password and other properties is also specified in this document.

**oebpsemail.properties.** This file defines data for e-mail protocol, the IMAP server, e-mail ids, and the temporary location for document downloading and other properties.

**oebps.conf.** This file defines all property file names used by the BP server; also defines values for the SMTP server (set by installer), Business Process Server application home directory and other properties. Do not change these property values.
Publishing BP Server applications

You must publish a BP Server application before it can be used. This involves using the Administration module of Business Process Portal or issuing commands and/or macros in BP Server Admin.

Perform the following:

1. Create the process using the Business process template XML file.
   This is done by the Business Process Server Application Developer using OpenEdge. For more information refer to OpenEdge Getting Started: Developing BPM Applications with Developer Studio.

2. Install the process.
   This step validates the process definition. If there is any problem in the process definition, for example, or if the flow of the process is not correct, then you can see either warnings or error messages.

3. Create and activate a process instance.
   This starts an instance of the process.

Note: The Business Process Server administrator completes the first two steps and Business Process Server end-users generally perform the final step.

Understanding the process flow

Once a process instance is activated, the first workstep defined in the process is run. For each workstep, BP Server creates workitems for the performers. BP Server then assigns tasks to the performers as specified in the process flow. The performer of an activity workstep can be an individual, any member of a group, all members of a group, or any member of a queue.

When a task is assigned to a user, it shows up in the person’s Task List. Once all the workitems of a workstep (meaning all the tasks) are completed, the server activates the next workstep defined in the process flow.

Suspending the BP Server

Occasionally, the BP Server may exit immediately due to any database error, including lack of space in the database. Subsequently, events generated by BP Server are enabled for posting into the database and an SQL exception is thrown. The BP Server then automatically goes into suspend mode for the server, as well as the database connections, the external connections, and the external performer executions. While in suspend mode, the server periodically monitors database availability and creates a new database connection when the server becomes available. The BP Server is also restored to the previous state without losing the event that caused the database failure.
Using the BP Server configuration interface

Business Process Server stores the configuration parameters for BP Server in the $\textit{bpserver.conf}$ file, located in the $\textit{OEBPS\_HOME\_conf}$ directory. You can use the Configuration interface in the Administration module to configure these parameters. To see additional parameters that are not visible in the interface, refer to the $\textit{bpserver.conf}$ file. For specific information on changing log levels for BP Server, see Using the log configuration interface on page 89.

Perform the following to view BP Server configuration page:

1. In the Administration module, click $\textit{System} \Rightarrow \textit{Configuration} \Rightarrow \textit{BP Server}$, to view the $\textit{BP Server Configuration}$ page.

   This page displays your current configuration settings for BP Server.

   An example of this page is shown in the following figure.

   \textbf{Figure 20: Using the BP Server configuration page}

2. You can scroll through the listed parameters and modify values, as required.

   Refer to Table 14 on page 75 for a description of the parameters.

3. Click $\textit{Save}$.

   Business Process Server updates the configuration after your confirmation.

**BP Server configuration parameters**

Table 14 on page 75 presents the configuration parameters for BP Server, a description of each parameter, and any default values, if applicable.

\textbf{Note:} Configuration parameters cannot reload until you restart the server.
### Parameters

#### Table 14: BP Server configuration parameters

<table>
<thead>
<tr>
<th>Parameter name</th>
<th>Default value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID of BP Server</td>
<td>True</td>
<td>If set to true, then the debug (trace) information is written to the log file for the BP Server API.</td>
</tr>
<tr>
<td>BP Server Debug Flag for API</td>
<td>False</td>
<td>If set to true, then the debug (trace) information is written to the log file for the BP Server API.</td>
</tr>
<tr>
<td>BP Server Debug Flag for Utilities</td>
<td>False</td>
<td>If set to true, then the debug (trace) information is written to the log file for the BP Server utilities.</td>
</tr>
<tr>
<td>BP Server Debug Flag for Session Beans</td>
<td>False</td>
<td>If set to true, then the debug (trace) information is written to the log file for the BP Server Session Beans.</td>
</tr>
<tr>
<td>BP Server Debug Flag for Entity Beans</td>
<td>False</td>
<td>If set to true, then the debug (trace) information is written to the log file for the BP Server Entity beans.</td>
</tr>
<tr>
<td>BP Server Debug Flag for Server Engine</td>
<td>False</td>
<td>If set to true, then the debug (trace) information is written to the log file for the BP Server Engine.</td>
</tr>
<tr>
<td>BP Server Debug Flag for User Session</td>
<td>False</td>
<td>If set to true, then the debug (trace) information is written to the log file for the BP Server User Session.</td>
</tr>
<tr>
<td>BP Server Debug Flag for Data Access Objects (DAO)</td>
<td>False</td>
<td>If set to true, then the debug (trace) information is written to the log file for the BP Server Data Access Objects.</td>
</tr>
<tr>
<td>BP Server Debug Flag for External Performers</td>
<td>False</td>
<td>If set to true, then the debug (trace) information is written to the log file for the BP Server External Performers.</td>
</tr>
<tr>
<td>BP Server Debug Flag for Timer Action</td>
<td>False</td>
<td>If set to true, then the debug (trace) information is written to the log file for the BP Server timer action support.</td>
</tr>
<tr>
<td>BP Server Debug Flag for ProcessTemplate creation</td>
<td>False</td>
<td>If set to true, then it prints the debug information of process template creation and initialization.</td>
</tr>
<tr>
<td>BP Server Debug Flag for printing the jst.writeLog in scripts</td>
<td>False</td>
<td>If set to true, it prints the statements mentioned within jst.writeLog in scripts.</td>
</tr>
</tbody>
</table>

*Configuration parameters CANNOT be reloaded until you restart the server.*
<table>
<thead>
<tr>
<th>Parameter name</th>
<th>Default value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BP Server Debug Flag for FileClassLoader</td>
<td>False</td>
<td>If true, the server writes the debug information of FileClassLoader used for adapter loading.</td>
</tr>
<tr>
<td>Debug Flag</td>
<td>False</td>
<td>If set to true, it prints the debug information.</td>
</tr>
<tr>
<td>Timeout for User Session</td>
<td>360</td>
<td>The time in minutes after which the session expires if left idle.</td>
</tr>
<tr>
<td>Sending Email notifications</td>
<td>False</td>
<td>The option to send e-mail notifications upon various events. This property is false by default.</td>
</tr>
<tr>
<td>Start Email Reader</td>
<td>False</td>
<td>The option to start the Email Reader at BP Server startup to listen to e-mails sent to BP Server for completing tasks etc.</td>
</tr>
<tr>
<td>Sending Email notifications when work item is completed¹</td>
<td>False</td>
<td>Option to send email notifications to performers when work item is completed.</td>
</tr>
<tr>
<td>Sending Email notifications to other performers in a group when one of the</td>
<td>False</td>
<td>Option to send email notifications to other group performers when one of the group assigns task to self.</td>
</tr>
<tr>
<td>group performers assigns task to himself/herself²</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Running Dashboard</td>
<td>True</td>
<td>Option to start collection of Dashboard information at BP Server startup.</td>
</tr>
<tr>
<td>BP Server tracking work item performer flag</td>
<td>True</td>
<td>If set to true, all the work item performers of the activated process instance are remembered by BP Server. Note: Turning on/off the flag only affects the process instance activated after it.</td>
</tr>
<tr>
<td>BP Server Callback notification</td>
<td>False</td>
<td>If set to true, change of BP Server states is notified by invoking registered callback adapters.</td>
</tr>
<tr>
<td>BP Server Calendar</td>
<td>True</td>
<td>If set to true, uses calendar to compute due date.</td>
</tr>
<tr>
<td>Event Trace³</td>
<td>False</td>
<td>If set to true, prints event information in the log file.</td>
</tr>
</tbody>
</table>

¹ These parameters are used by the Event Publisher.
### Using the BPM Process Store configuration interface

The BPM Process Store configuration file specifies how the BPM Process Store daemon is running. You specify the time interval that the daemon wakes up, the number of events processed for each execution, and what kind of logging is necessary. Another parameter is included to control how often the dashboard population thread wakes up.

Business Process Server stores the configuration parameters for BPM Process Store in the `bpmprocessstore.conf` file, located in the `OEBPS_HOME\conf` directory.

If you want to change the log level for BPM Process Store, then you can change it in the `oebpslog.conf` file in the `OEBPS_HOME\conf` directory, but you must also make sure to navigate to the `bpmprocessstore.conf` file in the `OEBPS_HOME\conf` directory, and change the settings for the following parameters to ‘true’, as shown in the following example (for more information, see Using the log configuration interface on page 89):

```bash
bpmprocessstore.debug.engine=true
bpmprocessstore.printEvent=true
bpmprocessstore.printStack=true
bpmprocessstore.debug.sql=true
```

By default, BPM Process Store does not send queries and perform calculations related to resources, worktime, and wait time to improve performance by avoiding unnecessary calculations. However, if you want BPM Process Store to perform these calculations, then in the `bpmprocessstore.conf` file set the `bpmprocessstore.resource.usage` parameter to `true`.

After you make these changes, you can reload these parameters without restarting the server by using the BPM Process Store utility. For more details, see Reloading the configuration parameters on page 79.

---

<table>
<thead>
<tr>
<th>Parameter name</th>
<th>Default value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comma separated list of senders</td>
<td>com.savvion.sbm.eventpublisher.sender.JMSSender</td>
<td>Comma separated fully qualified class names of senders. For example: com.savvion.sbm.eventpublisher.sender.JMSSender, com.savvion.sbm.eventpublisher.sender.SimpleSender, common.externalperformers.SimpleEPSender</td>
</tr>
<tr>
<td>Default filter class name</td>
<td>com.savvion.sbm.eventpublisher.filter.ANDFilter</td>
<td>Fully qualified class name for Default Filter Class.</td>
</tr>
<tr>
<td>Event Publisher Sender Location</td>
<td></td>
<td>The location where user defined Sender or Filter Classes are kept. When no values are specified, $OEBPS_HOME/ebmsapps directory is assumed as the default location.</td>
</tr>
</tbody>
</table>
Configuring BPM Process Store

You can also use the Configuration interface in the Administration module to configure visible BPM Process Store parameters. To see additional parameters that are not visible in the interface, refer to the bpmprocessstore.conf file.

To configure BPM Process Store using Business Process Portal:

1. In the Administration module, click System > Configuration > BPM Process Store, to view the BPM Process Store Configuration page.

   This page displays your current configuration settings for BPM Process Store as shown in the following figure.

   **Figure 21: Using the BPM Process Store configuration page**

   ![BPM Process Store Configuration Page](image)

2. You can scroll through the listed parameters and modify values, as required.
   
   Refer to Table 15 on page 78 for a description of the BPM Process Store parameters.

3. Click Save.

   Business Process Server updates the configuration after your confirmation.

BPM Process Store configuration parameters

Table 15 on page 78 presents the configuration parameters for BPM Process Store and a description of each, along with the default values, when applicable.

**Parameters**

**Table 15: BPM Process Store configuration parameters**

<table>
<thead>
<tr>
<th>Parameter name</th>
<th>Default value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BPM Process Store Server Debug Control Flag</td>
<td>False</td>
<td>If set to True, the debug (trace) information is written to the log file for the BPM Process Store engine.</td>
</tr>
<tr>
<td>Parameter name</td>
<td>Default value</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>---------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>BPM Process Store Debug SQL Flag</td>
<td>False</td>
<td>If set to True, all the SQL statements used in BPM Process Store engine are written to the log file while starting up.</td>
</tr>
<tr>
<td>BPM Process Store Event Trace</td>
<td>False</td>
<td>If set to true, server writes the various events in the log file.</td>
</tr>
<tr>
<td>Timer Interval for BPM Process Store</td>
<td>10000</td>
<td>The number of milliseconds BPM Process Store sleeps when it is idling. The values should be in range of 5000-60000 milliseconds.</td>
</tr>
<tr>
<td>Sending Email Notifications</td>
<td>True</td>
<td>If set to True, then an email notification containing details is sent to the system administrator when an error occurs.</td>
</tr>
</tbody>
</table>

### Reloading the configuration parameters

After you change the configuration parameters either by editing the `bpmprocessstore.conf` file, or by using the BPM Process Store Configuration interface, you can reload the updated configuration parameters without restarting the server. Business Process Server contains a BPM Process Store utility to do this, in the `OEBPS_HOME\bin` folder.

**For Windows:**

```
bpmProcessStore.cmd refresh
```

**For UNIX:**

```
bpmProcessStore.sh refresh
```

**Note:** If you have changed the Batchsize parameter, then you must restart the server to reload it.

### Using the email server configuration interface

Business Process Server stores e-mail account information in the `oebpsemail.properties` file, located in the `OEBPS_HOME\conf` directory. To adjust any of these parameters you must access the `oebpsemail.properties` file. The parameters you may adjust in this file are described in Table 16 on page 80.

**To configure email server using Business Process Portal:**

1. In the Administration module, click **System > Configuration > Email**, to view the Email Configuration page.

   This page displays your current configuration settings for Email Server.

   An example of this page is shown in the following figure.
2. You can scroll through the listed parameters and modify values, as required. Refer to Table 16 on page 80 for a description of the Email Server parameters.

3. Click Save.

Business Process Server updates the configuration after your confirmation.

**Email server configuration parameters**

Table 16 on page 80 presents the configuration parameters for Email server, a description of use, along with default values, if applicable.

**Parameters**

<table>
<thead>
<tr>
<th>Parameter name</th>
<th>Default value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BP Server Email ID</td>
<td><a href="mailto:oelbpsadmin@apac.progress.com">oelbpsadmin@apac.progress.com</a></td>
<td>The e-mail ID for BP Server to send e-mail notifications and receiving the user’s e-mail for completing the work item.</td>
</tr>
<tr>
<td>System Admin Email ID</td>
<td><a href="mailto:oelbpsadmin@apac.progress.com">oelbpsadmin@apac.progress.com</a></td>
<td>The email ID of system administrator to send email notifications during some system problems.</td>
</tr>
<tr>
<td>protocol</td>
<td>imap</td>
<td>The protocol used to receive the mails from the mail server, i.e. values could be IMAP/POP3. An optional property, the default is IMAP if a default property is not specified.</td>
</tr>
<tr>
<td>Port number for outgoing mail server</td>
<td>25</td>
<td>The port number of the outgoing mail server.</td>
</tr>
</tbody>
</table>
Using BP Server admin

You can choose to publish Business Process Server applications using a command-oriented interface known as BP Server Admin. You can use BP Server Admin commands to create and install process templates. Refer to the "Using BP Server Admin" chapter in the BP Server Developer's Guide.

Troubleshooting BP Server configuration

This section answers the most frequently asked questions about troubleshooting BP Server configuration.

Troubleshooting

Table 17: Troubleshooting BP Server configuration

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>I cannot start BP Server.</td>
<td>Check the version of your JDK and make sure that the CLASSPATH for the JDK is set properly.</td>
</tr>
<tr>
<td>Question</td>
<td>Answer</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>The Web API was deprecated for version 3.0. What can I use for similar functionality?</td>
<td>The three Web API servlets were BLPT (completing a step from the Web), BLST (checking the status of the Web process) and BLCP (creating a Web process instance). Use the WebApp worksteps with e-mail performers to replace BLPT functionality. Implement BLST as a Web application using Progress Developer Studio for OpenEdge. A Web application designed by OpenEdge can use the PAKcreatePI adapter to implement similar functionality to BLCP.</td>
</tr>
<tr>
<td>BP Server generates a core dump or presents a java.lang.StackOverflow error when working with large XML files.</td>
<td>Sun’s implementation of the Java Virtual Machine in JDK releases 1.0.2 and 1.1, and the Java 2 SDK, Standard Edition v1.2, allocate fixed-size native method stacks of a single size. You can set the size of the native method stacks on virtual machine start-up using the “-ss” flag.</td>
</tr>
<tr>
<td>Applications created through BP Server Admin could not be uninstalled through Administration, even though I received a Done message.</td>
<td>Check if instances are still running, otherwise the application will not uninstall. Remove instances using BP Server Admin and remove the application using Administration.</td>
</tr>
<tr>
<td>Security properties are not found using defaults after starting BPM Process Store, BP Server, or BP Server Admin.</td>
<td>Check if you have entered the utility startOEBPS -c BPServer</td>
</tr>
<tr>
<td>What if the e-mail support raises a security exception?</td>
<td>Open the oebpsemail.properties file and find the BPServer.EmailServer.UniqueID parameter. Set to False to flush process instances and remove the e-mail security exception. Set to True enables the security feature. The default is set to True.</td>
</tr>
<tr>
<td>What causes a gap that sometimes occurs in ID sequence in the process instance ID or process template ID in BP Server?</td>
<td>BP Server uses a sequence tool to generate IDs for process template and process instance. For every sequence, such as process instance sequence, BP Server caches 10 numbers in memory in order to avoid too frequent database access. If you stop the server or the server crashes, then all the cache numbers are lost from memory. This is a common behavior.</td>
</tr>
</tbody>
</table>
Configuring BPM Events

This chapter explains how to configure BPM Events using Business Process Portal’s Administration module. This chapter also explains how to prepare and administer business rules and events, along with BPM Events backup and restore procedures. It further describes how to use BPM Events Admin and other utilities.

**Note:** The BPM Events rule language and BPM Events utilities are described in detail in the *BPM Events User’s Guide*.

For details, see the following topics:

- Using the BPM Events configuration interface
- Loading applications and recovering applications

**Using the BPM Events configuration interface**

Business Process Server stores the configuration parameters for BPM Events in the `bpmevents.conf` file, located in the `OEBPS_HOME\conf` directory. You use the Configuration interface in the Administration module to configure these parameters. To see additional parameters that are not visible in the interface, refer to the `bpmevents.conf` file.

To configure BPM Events using Business Process Portal:

1. In the Administration module, click **System > Configuration > BPM Events**, to view the **BPM Events Configuration** page.

   This page displays your current configuration settings for BPM Events.
An example of this page is shown in the following figure.

Figure 23: Using the BPM Events configuration page

2. You can scroll through the listed parameters and modify values, as required.
   Refer to Table 18 on page 84 for a description of the parameters.

3. Click Save.
   Business Process Server updates the configuration after your confirmation.

**BPM Events configuration parameters**

Table 18 on page 84 presents the configuration parameters for BPM Events and their descriptions, along with default values, when appropriate.

**Parameters**

<table>
<thead>
<tr>
<th>Parameter name</th>
<th>Default value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Debug Flag</td>
<td>off</td>
<td>If set to on, the debug (trace) information is written to the log file.</td>
</tr>
<tr>
<td>Database Access Trace</td>
<td>off</td>
<td>If set to on, the database access information is written to the log file.</td>
</tr>
<tr>
<td>Event Cache Size</td>
<td>10000</td>
<td>The maximum size, in number of events, of the BPM Events event cache. The cache is partially flushed when this limit is reached. Format: integer</td>
</tr>
<tr>
<td>Sender Email</td>
<td><a href="mailto:oebpsadmin@apac.progress.com">oebpsadmin@apac.progress.com</a></td>
<td>The default sender e-mail address for BPM Events.</td>
</tr>
<tr>
<td>Parameter name</td>
<td>Default value</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Automatic Error Recovery</td>
<td>on</td>
<td>If set to on, when an error is caught by the event reader, it processes the next event, otherwise it stops processing events.</td>
</tr>
<tr>
<td>DB Maximum Transaction Duration</td>
<td>30</td>
<td>Maximum duration of DB Transaction in minutes, default 30 minutes</td>
</tr>
<tr>
<td>Event Batch Size</td>
<td>100</td>
<td>Maximum size of each batch of events fetched from the database. Format: integer</td>
</tr>
<tr>
<td>Sleep Time</td>
<td>3000</td>
<td>Period (milliseconds) between fetching two batches of events. Format: integer</td>
</tr>
<tr>
<td>Sleep Time When Events</td>
<td>0</td>
<td>Period (milliseconds) between fetching two batches of events when there are still events in BPM Events table. Format: integer</td>
</tr>
<tr>
<td>Retry Interval</td>
<td>30000</td>
<td>Period (milliseconds) between retry of database connection. Format: integer</td>
</tr>
<tr>
<td>Maximum Database Retry Number</td>
<td>-1</td>
<td>Maximum database retry number when connection failed. By default, the value is -1, which specifies that BPM Events tries to re-establish the connection infinitely until the database is up or BPM Events is shut down. Format: integer</td>
</tr>
<tr>
<td>Maximum Total Prepared Statement</td>
<td>100</td>
<td>Maximum number of opened prepared statements. Format: integer</td>
</tr>
<tr>
<td>Max Gap Retry</td>
<td>10</td>
<td>Maximum retry number when an event gap is found. Format: integer</td>
</tr>
<tr>
<td>BPM Events Callback</td>
<td>False</td>
<td>If set to true, change of BPM Events states is notified by invoking registered callback adapters.</td>
</tr>
</tbody>
</table>

**Loading applications and recovering applications**

BPM Events automatically keeps a database image of its internal state for recovery purposes. When starting BPM Events through the Administration module of Business Process Portal, it automatically reloads the latest recovery backup (if any), and processes the event backlog generated in the database event queue while BPM Events is down. No data is lost due to a shutdown, whether voluntary (operator) or not (server crash). However, it is possible to make a fresh start using the "discardBPMEventsBackup" utility script (see the BPM Events User’s Guide).

Do not confuse starting BPM Events with loading (or reloading) an application. The following describes the difference between starting BPM Events and loading an application:
• **Starting BPM Events.** Automatically triggers the recovery mechanism for all applications loaded during the latest shutdown. The internal state is recovered, as it was at the end of the processing of the latest event before shutdown. The processing proceeds, as if there was no interruption. If no application was running before, or if a new application requires starting, then load this application after BPM Events is started.

• **Loading an application.** Involves loading rules using a procedure quite different from recovery. When you start BPM Events, if some applications were recovered, then do not load BPM Events again (in fact, you cannot unless you unload it first). When loading a rule module, the \texttt{initialize}{} section is automatically executed. It contains initialization statements that create and initialize infopads. This does not happen when recovering an application or a module.

Similarly, stopping BPM Events does not unload the application. The following describes the difference between stopping BPM Events and unloading an application:

• **Stopping BPM Events.** BPM Events automatically shuts down so that it can restart and resume the processing of events as if there was no interruption. The latest state of all loaded applications is saved to the database, so that after recovery of these can resume without any intervention from the user.

• **Unloading an application.** A unloaded rule module automatically execute its \texttt{finalize}{} section. The statements in this section will typically delete application objects (infopads) from both the memory and the database. If you unload an application, then you remove all trace of this application in the rule engine, including the recovery backup in the database. When restarting BPM Events, this application is not recovered. When you reload the application, it is similar to a new installation: the application state and objects are reinitialized.

Finally, the BPM Events Admin utility provides another mode of adding rules in the engine—the Replace command (for an application or for a single rule module). Replacing an application (or module) is intended for upgrading the rules of the application (or of the module), without affecting the objects currently manipulated by the application. Unlike unloading, which typically executes some final statements (like deleting the infopads), the Replace command only replaces the rules—\texttt{no finalize}{} or \texttt{initialize}{} section is executed when unloading then reloading.
Using the Log Viewer

Use the Log Viewer to track the status and error messages for each component. With the Log Viewer, you can see log files for the following:

- Business Process Portal
- OEBPS
- BP Server
- BPM Webflow
- BPM Events
- BPM Process Store
- Archiver
- Event Publisher

**Note:** You may adjust the log level for these and other categories in the Log Configuration page. Refer to Using the log configuration interface on page 89 for more details.

For details, see the following topics:

- Viewing log files
- Configuring the log
- Log configuration
Viewing log files

With the Log Viewer, you can see the priority set for the log levels of each component. You set the priority of each log level in the Log Configuration page in the System menu in the Administration module. Business Process Server stores the priorities for the log levels in `oebpslog.conf`, located in the `OEBPS_HOME\conf` directory. For more information, see Using the log configuration interface on page 89.

To access and view log files in the Log Viewer:

1. In the Administration module, click System > Log Viewer.

   The Log Viewer page displays the log messages.

   The example of this page is shown in the following figure.

   **Figure 24: Log viewer**

2. To view log files for a specific component, select an option from the Log file to view list.

   To specify the number of lines that each page should contain, enter a number in the Number of Lines box. Business Process Portal remembers this value till you change it.

3. Click Go.

   The log viewer presents the requested log files.

Configuring the log

The Business Process Portal's Administration module enables you to set the log levels, format, file size, and backup archive files using the Log configuration interface. This section explains how to configure the log levels for categories that include Business Process Portal, BPM Events, BPM Webflow, BPM Process Store, BP Server, Web Services, Dashboard, Archiver, and Event Publisher.
Setting log levels with log4j

You set the log levels in the Log Configuration page as shown in this chapter. Use the Log Viewer feature to view the priority set for the log levels of each category. Log levels are determined by Log4j, a uniform logging framework provided for all Business Process Server components. This framework uses log4j API, an open source logging package available under Apache Public License.

Note: For more information about log4j features, visit the Web site:

The logging appender

As the destination output, appenders may take the form of a console, network socket, UNIX or Windows 2000 syslog files, or an interface. For Business Process Server components, the default appender is the respective log files. In oebpslog.conf, you adjust only two parameters: appender and log level. By default, all Business Process Server categories contain rolling file appenders as the appender and ‘info’ as the log level. For example:

log4j.category.BPM CustomUI API=info,A2

Using the log configuration interface

Business Process Server stores the priorities for the log level in the oebpslog.conf file, located in the OEBPS_HOME\conf directory. Business Process Server allows you to change the parameters through the Log configuration interface, as shown in Configuring the log from Business Process Portal on page 90. To see additional parameters that are not visible in the interface, refer to the oebpslog.conf file.

You may adjust log levels in oebpslog.conf under one of the categories listed on the previous page (Business Process Portal modules, BPM Process Store, BPM Events, Archiver, etc.). You can assign one of the following priorities (‘debug’ is the lowest priority and ‘fatal’ is the highest):

- **Debug**. Provides fine-grained information events that are most useful in debugging an application.
- **Info**. Provides coarse-grained information events that highlight the progress of an application
- **Warn**. Indicates potentially harmful situations.
- **Error**. Indicates error events that might still allow the application to continue.
- **Fatal**. Indicates very severe events that can presumably cause the application to abort.

If you want to change the log level for BPM Process Store, BP Server, Archiver or Event Publisher, then you must also navigate to the *.conf file for the category (for example, bpmprocessstore.conf in the OEBPS_HOME\conf directory) and change the settings for the following parameters (if they are present) to ‘true’, as shown in the following example for the BPM Process Store category:

bpmprocessstore.debug.engine=true
bpmprocessstore.printEvent=true
bpmprocessstore.printStack=true
bpmprocessstore.debug.sql=true
Configuring the log from Business Process Portal

To configure the Log using the Administration module in Business Process Portal, complete the following steps:

1. In the Administration module, click **System > Configuration > Log**.

   The **Log Configuration** page appears as shown in the following figure. This page displays the list of components that you can configure.

   **Figure 25: Using the log configuration page**

2. You can scroll through the listed parameters and modify values, as required. Refer to Table 19 on page 90 for a description of the parameters.

3. Click **Save**.

   Business Process Server updates the configuration after your confirmation.

Log configuration

Table 19 on page 90 presents the configuration parameters for the log and a description of use, along with default values, if appropriate.

**Parameters**

**Table 19: Log configuration**

<table>
<thead>
<tr>
<th>Configuration name</th>
<th>Default value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OEBPS Log Level</td>
<td>info, OEBPS</td>
<td>The log level for messages written to the default OEBPS log file.</td>
</tr>
<tr>
<td>OEBPS Log Maximum File Size</td>
<td>6MB</td>
<td>The Maximum size for the OEBPS log file. MB or KB should be capitalized.</td>
</tr>
<tr>
<td>Configuration name</td>
<td>Default value</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------------------</td>
<td>---------------</td>
<td>-------------</td>
</tr>
<tr>
<td>OEBPS Log Maximum Number of Backups</td>
<td>3</td>
<td>The maximum number of backup archive files used for the OEBPS log file.</td>
</tr>
<tr>
<td>OEBPS Log Message Format</td>
<td>%d{DATE} %c{3} %p - %m%n</td>
<td>Format messages in the OEBPS log file according to this pattern.</td>
</tr>
<tr>
<td>Business Process Portal Maximum File Size</td>
<td>6MB</td>
<td>Maximum size for Business Process Portal log file before back up or clean up.</td>
</tr>
<tr>
<td>Business Process Portal Log Message Format</td>
<td>[#</td>
<td>%d{DATE}</td>
</tr>
<tr>
<td>BPMEEvents Log Level</td>
<td>info, BPMEvents.File</td>
<td>The log level for messages written to the BPMEEvents log file.</td>
</tr>
<tr>
<td>BPMEEvents Maximum File Size</td>
<td>6MB</td>
<td>Maximum size for the BPMEEvents log file before back up or clean up.</td>
</tr>
<tr>
<td>BPMEEvents Maximum Number of Backups</td>
<td>3</td>
<td>Maximum number of backup archive files used for the BPMEEvents log file.</td>
</tr>
<tr>
<td>BPMEEvents Log Message Format</td>
<td>[#</td>
<td>%d{DATE}</td>
</tr>
<tr>
<td>BPMEEventsOutput Log Level</td>
<td>info, BPMEventsOutput.File</td>
<td>The log level for messages written to the BPMEEventsOutput log file.</td>
</tr>
<tr>
<td>BPMEEventsOutput Maximum File Size</td>
<td>6MB</td>
<td>Maximum size for the BPMEEventsOutput log file before back up or clean up.</td>
</tr>
<tr>
<td>BPMEEventsOutput Maximum Number of Backups</td>
<td>3</td>
<td>Maximum number of backup archive files used for the BPMEEventsOutput log file.</td>
</tr>
<tr>
<td>BPMEEventsOutput Log Message Format</td>
<td>[#</td>
<td>%d{DATE}</td>
</tr>
<tr>
<td>BPMWebflow Log Level</td>
<td>info, BPMWebflow.File</td>
<td>The log level for messages written to the BPMWebflow log file.</td>
</tr>
<tr>
<td>Configuration name</td>
<td>Default value</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>BPMWebflow Maximum File Size</td>
<td>6MB</td>
<td>Maximum size for the BPMWebflow log file before back up or clean up.</td>
</tr>
<tr>
<td>BPMWebflow Maximum Number of Backups</td>
<td>3</td>
<td>Maximum number of backup archive files used for the BPMWebflow log file.</td>
</tr>
<tr>
<td>BPMWebflow Log Message Format</td>
<td>[#] %d{DATE}</td>
<td>Format messages in the BPMWebflow log file according to this pattern.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>%c{3}</td>
</tr>
<tr>
<td>BPMProcessStore Log Level</td>
<td>info, BMPProcessStore.File</td>
<td>The log level for messages written to the BPMProcessStore log file.</td>
</tr>
<tr>
<td>BPMProcessStore Maximum File Size</td>
<td>6MB</td>
<td>Maximum size for the BPMProcessStore log file before back up or clean up.</td>
</tr>
<tr>
<td>BPMProcessStore Maximum Number of Backups</td>
<td>3</td>
<td>Maximum number of backup archive files used for the BPMProcessStore log file.</td>
</tr>
<tr>
<td>BPMProcessStore Log Message Format</td>
<td>[#] %d{DATE}</td>
<td>Format messages in the BPMProcessStore log file according to this pattern.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>%c{3}</td>
</tr>
<tr>
<td>WebService Maximum File Size</td>
<td>6MB</td>
<td>Maximum size for the WebService log file before back up or clean up.</td>
</tr>
<tr>
<td>WebService Maximum Number of Backups</td>
<td>3</td>
<td>Maximum number of backup archive files used for the WebService log file.</td>
</tr>
<tr>
<td>WebService Log Message Format</td>
<td>%d{DATE} %c{3}</td>
<td>Format messages in the WebService log file according to this pattern.</td>
</tr>
<tr>
<td></td>
<td>%p</td>
<td>![m%n]</td>
</tr>
<tr>
<td>mconsole Maximum File Size</td>
<td>6MB</td>
<td>Maximum size for the mconsole log file before back up or clean up.</td>
</tr>
<tr>
<td>mconsole Maximum Number of Backups</td>
<td>3</td>
<td>Maximum number of backup archive files used for the mconsole log file.</td>
</tr>
<tr>
<td>Management Console Log Message Format</td>
<td>[#] %d{DATE}</td>
<td>Format messages in the Management Console log file according to this pattern.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>%c{3}</td>
</tr>
<tr>
<td>Configuration name</td>
<td>Default value</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>--------------------------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Event Publisher Log Level</td>
<td>info, EventPublisher.File</td>
<td>The log level for messages written to the Event Publisher log file.</td>
</tr>
<tr>
<td>Event Publisher Maximum File Size</td>
<td>6MB</td>
<td>Maximum size for the Event Publisher log file before back up or clean up.</td>
</tr>
<tr>
<td>Event Publisher Maximum Number of Backups</td>
<td>3</td>
<td>Maximum number of backup archive files used for the Event Publisher log file.</td>
</tr>
<tr>
<td>Event Publisher Log Message Format</td>
<td>[#] %d{DATE}</td>
<td>%c{3}</td>
</tr>
<tr>
<td>BPServer Log Level</td>
<td>info,BPServer.File</td>
<td>The log level for messages written to the BPServer log file.</td>
</tr>
<tr>
<td>BPServer Maximum File Size</td>
<td>6MB</td>
<td>Maximum size for the BPServer log file before back up or clean up.</td>
</tr>
<tr>
<td>BPServer Maximum Number of Backups</td>
<td>3</td>
<td>Maximum number of backup archive files used for the BPServer log file.</td>
</tr>
<tr>
<td>BPServer Log Message Format</td>
<td>[#] %d{DATE}</td>
<td>%c{3}</td>
</tr>
<tr>
<td>Messaging Log Level</td>
<td>debug,Messaging.File</td>
<td>The log level for Messages written to the message log file.</td>
</tr>
<tr>
<td>Messages Maximum File Size</td>
<td>6MB</td>
<td>Maximum size for the Messages log file before back up or clean up.</td>
</tr>
<tr>
<td>Messages Maximum Number of Backups</td>
<td>3</td>
<td>Maximum number of backup archive files used for the Messages log file.</td>
</tr>
<tr>
<td>Messages Log Message Format</td>
<td>[#] %d{DATE}</td>
<td>%c{3}</td>
</tr>
<tr>
<td>BPServer Client Library Log Level</td>
<td>info, BPServerClient.File</td>
<td>The log level for messages written to the BPServer Client Library log file.</td>
</tr>
<tr>
<td>BPServer Client Library Maximum File Size</td>
<td>6MB</td>
<td>Maximum size for the BPServer Client Library log file before back up or clean up.</td>
</tr>
<tr>
<td>BPServer Client Library Maximum Number of Backups</td>
<td>3</td>
<td>Maximum number of backup archive files used for the BPServer Client Library log file.</td>
</tr>
<tr>
<td>Configuration name</td>
<td>Default value</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>---------------</td>
<td>-------------</td>
</tr>
<tr>
<td>BPServer Client Library Log Message Format</td>
<td>[#</td>
<td>%d{DATE}</td>
</tr>
<tr>
<td>Home Log Level</td>
<td>info, MAdapter.File</td>
<td>The log level for messages written to the Home log file.</td>
</tr>
<tr>
<td>Home Maximum File Size</td>
<td>6MB</td>
<td>Maximum size for the Home log file before back up or clean up.</td>
</tr>
<tr>
<td>Home Maximum Number of Backups</td>
<td>3</td>
<td>Maximum number of backup archive files used for the Home log file.</td>
</tr>
<tr>
<td>Home Log Message Format</td>
<td>[#</td>
<td>%d{DATE}</td>
</tr>
<tr>
<td>pim Log Level</td>
<td>info, pim.File</td>
<td>The log level for messages written to the pim log file.</td>
</tr>
<tr>
<td>pim Maximum File Size</td>
<td>6MB</td>
<td>Maximum size for the pim log file before back up or clean up.</td>
</tr>
<tr>
<td>pim Maximum Number of Backups</td>
<td>3</td>
<td>Maximum number of backup archive files used for the pim log file.</td>
</tr>
<tr>
<td>pim Log Message Format</td>
<td>[#</td>
<td>%d{DATE}</td>
</tr>
<tr>
<td>sdms Log Level</td>
<td>info, sdms.File</td>
<td>The log level for messages written to the sdms log file.</td>
</tr>
<tr>
<td>sdms Maximum File Size</td>
<td>6MB</td>
<td>Maximum size for the sdms log file before back up or clean up.</td>
</tr>
<tr>
<td>sdms Maximum Number of Backups</td>
<td>3</td>
<td>Maximum number of backup archive files used for the sdms log file.</td>
</tr>
<tr>
<td>sdms Log Message Format</td>
<td>[#</td>
<td>%d{DATE}</td>
</tr>
</tbody>
</table>
Managing event channels

This chapter explains how to use the Administration module of Business Process Portal to configure event channels. The Event Channel Configuration page enables the Business Process Server administrator to create, view, update and remove event channel.

For details, see the following topics:

• Managing event channels

Managing event channels

Business Process Server enables you to manage event channels by displaying information about existing channels, adding new channels, removing channels, updating existing channels.

You can manage event channels from the Administration module of Business Process Portal by using the Event Channel Configuration page as illustrated in Displaying information about an event channel on page 96.

You can perform the following tasks from this page:

• Display information about an existing channel.

• Create and remove channels.

• Update the channel information.
Displaying information about an event channel

To view the Event Channel Configuration page, in the Administration module, click System > Configuration > Event Publisher.

This page lists all current channels, as shown in the following figure.

Figure 26: Event channel configuration page

The Event Channel Configuration page displays information about the existing channels and the following information about each channel:

Table 20: Event channel information

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Channel Name</td>
<td>The name of the event channel.</td>
</tr>
<tr>
<td>Channel Type</td>
<td>Whether the event channel is of type topic or queue.</td>
</tr>
</tbody>
</table>

To manage the contents of the list, you can sort them. To navigate through the pages, you can use the paging controls. For more details about these operations, see Exploring Business Process Portal on page 28.

From the Event Channel Configuration page, you can:

- Add channels.
- View/modify channel details.
- Delete a channel.

These operations are explained further in this chapter in the following sections.

Adding event channels

To create an event channel, complete the following steps:
1. In the **Event Channel Configuration** page, click **Add Channel**.
   The **Add Channel** page is displayed enabling you to create a new channel.
   An example of this page is shown in the following figure.

   ![Add channel page](image)

   **Figure 27: Add channel page**

2. Specify requisite details in appropriate fields.
   
   You must enter the name of the queue or topic set up on your server as the channel name.
   The fields marked with a red asterix are required fields.
   
   Optionally, you can also specify a filter condition that can be applied to the messages sent to
   the queue or topic in the Filter Condition section.
   
   a) Specify the filter type in the **Type** text box.
   b) Specify the BP Server Event Value in the **Value** text box. Alternatively, click **Add** beside
      this text box, select the event value(s) in the **BPServer Event Values** window that opens,
      and then click **Submit**.
      
      Your selected values are added in the text box.
   c) Specify the process template and workstep template names in appropriate boxes.
   d) In the Context panel, click **Add** to open the **Add Context** window. Enter the context name
      beginning with "CTX:" and value in appropriate boxes, and then click **Save**.
      
      The context name and value is added in the Context table. To remove it from the table,
      select its checkbox in the first column, and then click **Delete**.

3. Click **Save** to add the new event channel and go back to the previous page.

   To reset the form and remove the information you just entered, click **Reset**. To cancel the action
   and exit the current page, click **Cancel**.

**Deleting channels**

You can delete a particular event channel that you no longer need.

To do so, follow these steps:
1. In the **Event Channel Configuration** page, select the channel that you want to delete.

   **Note:** For more details about this operation, see *Selecting and clearing rows* on page 35.

2. Click **Delete**.

   Business Process Portal deletes the selected event channel and it is removed from the list.

   **Note:** You can simultaneously delete multiple channels. To do this, in the **Event Channel Configuration** page, select multiple channels and then click **Delete**. Business Process Portal deletes all the selected channels.

### Updating event channel information

To update event channel information, complete the following steps:

1. In the **Event Channel Configuration** page, click the event channel name hyper link in the **Channel Name** column, whose details you want to update.

   The **Modify Channel** page is displayed.

   An example of this page is shown in the following figure.

   **Figure 28: Modify channel page**

   ![Modify channel page](image)

   2. Enter/modify the relevant data as necessary.

   3. Click **Save** to save the changes and go back to the previous page.

      To reset the form and remove the information you just entered, click **Reset**. To cancel the action and exit the current page, click **Cancel**.
Working with administrative filters

If the out of box filters provided by Business Process Server do not meet your requirements, then you, as a Business Process Server administrator, can create filters that can be used by others in your organization. Such filters are called "Admin Filters". For more information about Admin and other types of filters, see the Business Process Portal User’s Guide.

For details, see the following topics:

- Managing administrative filters
- Adding admin filters

Managing administrative filters

To view the Filter List page, in Administration module click System > Filter.

This page lists the out-of-the-box filters as well as any filters created by you, as a Business Process Server administrator, as shown in the following figure.
The Filter List page displays information about the filters defined by you. By default, it displays all filters created by you and the following information about each filter:

**Table 21: Filter list information**

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filter</td>
<td>The name of the filter.</td>
</tr>
<tr>
<td>Description</td>
<td>Additional information about a filter.</td>
</tr>
<tr>
<td>Filter Type</td>
<td>The type of the filter.</td>
</tr>
</tbody>
</table>

To manage the contents of the list, you can sort them. To navigate through the pages, you can use the paging controls. For more details about these operations, see Exploring Business Process Portal on page 28.

From the Filter List page, you can perform the following operations:

- Add a new Admin Filter, as described in Adding admin filters on page 100.
- Copy an existing Admin Filter, as described in Copying, modifying, and deleting admin filters on page 101.
- Modify an existing Admin Filter, as described in Copying, modifying, and deleting admin filters on page 101.
- Delete a Admin Filter, as described in Copying, modifying, and deleting admin filters on page 101.

## Adding admin filters

To remove clutter and to focus on your work, you can limit the tasks displayed in your Task list by defining your own filters.
As adding a new Admin Filter is very similar to adding a new My Filter by a Business Process Server User from the Home module, for more information, see the *Business Process Portal User’s Guide*. The only difference in adding a My Filter and adding an Admin Filter is that, in the case of a version-specific Admin Filter, in addition to the system dataslots, you can also use the global dataslots defined for that version while defining the filtering condition and/or sorting order.

The added filter is displayed on the **Filter List** page, with Filter Type as "Admin Filter."

The filters you create here are added under the "Global Filters" group of the Default Filter drop-down list in the **Profile** page in Home module. When you select an application from the Application drop-down list in the **Profile** page in Home module, the Admin Filters defined for that application are displayed in the Default Filter drop-down list.

They are also available under "Global Filters" group of the Filter drop-down list in the **Task List** page in Home module. If you select a specific application from the Application drop-down list and 'All' from the version drop-down list, then the Admin Filters defined for all versions of that application are displayed. If you select a specific application from the Application drop-down list and a specific version from the version drop-down list, then the Admin Filters defined for selected version of that application are displayed.

### Copying, modifying, and deleting admin filters

As copying an existing Admin Filter, modifying an existing Admin Filter, and deleting an Admin Filter operations are identical to the ones that are performed by a Business Process Server User from the Home module, for more information about these operations, see the *Business Process Portal User’s Guide*. 


Working with business calendars

To accurately calculate a task’s due date, Business Process Server considers the availability of the task’s performers. Performers’ availability in turn depends on their working time — that is, business hours and business days — and non-working time — that is, holidays and weekends.

The administrator can define business calendars using the Business Calendar feature, and can assign them to specific users and/or groups.

This chapter explains how to use the Business Calendar feature.

**Note:** For more information on using tags to define calendars and other technical aspects, see the Business Calendar chapter in the *BP Server Developer's Guide*.

For details, see the following topics:

- Displaying all business calendars
- Defining business calendars
- Editing business calendars
- Displaying calendar view
- Setting/Unsetting a default calendar
- Opening the default OEBPS calendar
- Business calendar restrictions
- Commands for calendar management
Displaying all business calendars

The Calendar List page lists all the existing business calendars. To view the Calendar List page, in the Administration module, click System > Calendars.

This page lists all business calendars, as shown in the Figure 30 on page 104.

Figure 30: Calendar list page

The Calendar List page lists all the existing business calendars and displays the following information about each business calendar:

Table 22: Calendar list information

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the business calendar.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the business calendar.</td>
</tr>
<tr>
<td>View</td>
<td>Click the icon in this column to see the Calendar View.</td>
</tr>
<tr>
<td>Default Selection</td>
<td>Indicates whether the current business calendar is set as the default calendar or not.</td>
</tr>
</tbody>
</table>

To navigate through the pages, you can use the paging controls. For more details about this operation, see Exploring Business Process Portal on page 28.

From the Calendar List page, you can perform the following operations:

- Defining a business calendar.
- Viewing/modifying an existing business calendar’s details.
- Seeing calendar view of an existing business calendar.
Defining business calendars

To define a business calendar, complete the following steps:

1. In the Calendar List page, click Add Calendar.

The Add Calendar page, containing General, Working Time and Non-working Time sections, is displayed enabling you to enter the new business calendar information.

An example of this page is shown in the following figure.

**Note:** If you want to use a predefined business calendar as a template for the business calendars you want to create, then see Opening the default OEBPS calendar on page 115. For limitations on Business Calendars, see Business calendar restrictions on page 116.

**Figure 31: Add calendar page (General section)**

2. In the General section, enter relevant data, as explained below:
   a) Specify a name and description for the business calendar in the Name and Description boxes respectively.

   **Note:** You should not use the following special characters in the name or description while defining a calendar: <, >, ', " , %, ;, +, \, and |.

   b) Select the geographical time zone to be used for the business calendar from the Time Zone drop-down list.

   Name, Description, and Time Zone are the required fields.
c) Define the Year Range for the business calendar by selecting the start and end years from the From and To drop-down lists respectively.

d) Define the Regular Business Hours by specifying the start and end times using the Start Time and End Time drop-down lists respectively.

e) Define the Mid-Day Break by specifying the start and end times using the Start Time and End Time drop-down lists respectively.

3. Open the Working Time section to define Working Time.

An example of this page is shown in the following figure.

**Figure 32: Add calendar page (Working time section)**

You can define working time if you want to specify business hours different than the regular business hours defined in the General section. For more information, see Managing working time on page 107.

4. Open the Non-working Time section to define non-working time.

An example of this page is shown in the following figure.
If you want to specify a holiday or weekend, then you can define it in the Non-working Time section. For more information, see Managing non-working time on page 109.

5. Click Save to define the new business calendar and go back to the previous page.

To reset the form and remove the information you just entered, click Reset. To cancel the action and exit the current page, click Cancel.

Managing working time

If you want to define different business hours only for a specific day, then you can do so in the Working Time section.

Perform the following:

1. In the Working Time section of the Add Calendar or Calendar Details page, click the Add Working Time button at the bottom of the Working Time table.

The Add Working Time window is displayed.

An example of this window is shown in the following figure.

Figure 34: Add working time window

a) In the Day/Date panel, specify whether you want to add working time for a specific day of the week or a specific date by selecting the Day or Date option. Then depending on your selection, specify the day of the week from the Day drop-down list, or specify the date by selecting appropriate value(s) from the Year, Month and Date drop-down lists.
When you add a working time, it takes priority over the regular business hours for that day. Hence, while defining the working time, you may also need to include the regular business hours. For example, if your regular working hours on a particular day are 09:00 to 18:00, and you want to indicate additional working hours from 18:00 to 20:00, then you should define the working time as 09:00 to 20:00.

b) In the Time panel, define working hours by specifying the start and end times using the **Start Time** and **End Time** drop-down lists respectively.

c) Click **Save** to add the new working time and go back to the previous page.

Click **Save & Add New** to save the current working time and reload the current window to continue adding another working time.

To reset the form and remove the information you just entered, click **Reset**. To cancel the action and exit the current window, click **Cancel**.

The new working time is added in the Working Time table.

**Note:** The non-working time has priority over the working time. Working time defined for a weekend or holiday is not considered while calculating the due date.

2. You can change the working hours of an existing day/date entry from the Working Time table. To do so, in the Working Time table, click the Day or Date link for the entry whose details you want to change.

The Working Time Details window is displayed.

An example of this window is shown in the following figure.

**Figure 35: Working time details window**

![Working Time Details Window](image)

a) In the Time panel, change working hours by specifying the start and end times using the **Start Time** and **End Time** drop-down lists respectively.

b) Click **Save** to update the working time and go back to the previous page.

To reset the form and remove the information you just entered, click **Reset**. Click **Delete** to remove the current working time. To cancel the action and exit the current window, click **Cancel**. The updated working time is added in the Working Time table.

**Note:** You should only change the working hours of the existing entry. If you change the day or date, then it is saved as a new working time entry in the table.

3. To delete one or more working time entries, select the working time entries that you want to delete from the table.

For more details about this operation, see **Selecting and clearing rows** on page 35.

4. Click **Delete Working Time** button at the bottom of the Working Time table.

The selected entries are removed.
Managing non-working time

Non-working Time consists of Holidays (half-day or full day) and Weekends.

To define these, complete the following steps:

1. In the Non-working Time section of the Add Calendar or Calendar Details page, click the Add Non-working Time button at the bottom of the Non-working Time table.

   The Add Non-working Time window is displayed.

   An example of this window is shown in the following figure.

   Figure 36: Add non-working time window

   ![Add Non-working Time window](image)

   a) Specify a name for the non-working time in the Name box.

   Note: Non-working time name must not contain a comma (",").

   b) Select appropriate options from the other panels depending on the type of holiday you want to define.

   For more details, see Settings for weekends and holidays on page 110.

   c) Click Save to add the new non-working time and go back to the previous page. Click Save & Add New to save the current non-working time and reload the current window to continue adding another non-working time. To reset the form and remove the information you just entered, click Reset. To cancel the action and exit the current window, click Cancel. The new non-working time is added in the Non-working Time table.

2. You can change the details of the non-working time. To do so, in the Non-working Time table, click the non-working time name link in the Name column, whose details you want to change.

   The Non-working Time Details window is displayed.

   An example of this window is shown in the following figure.

   Figure 37: Non-working time details window

   ![Non-working Time Details window](image)
Settings for weekends and holidays

You can define weekends and different types of holidays using different combinations of options in the Add Non-working Time window.

Table 23: Combinations of settings for weekends and holidays

<table>
<thead>
<tr>
<th>Type of holiday</th>
<th>Values of options</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Type</td>
<td>Year</td>
</tr>
<tr>
<td>Weekend</td>
<td>Weekend</td>
<td>---</td>
</tr>
<tr>
<td>Weekend</td>
<td>---</td>
<td>---</td>
</tr>
</tbody>
</table>
### Type of holiday

<table>
<thead>
<tr>
<th>Type of holiday</th>
<th>Values of options</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date-specific Holiday</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday and Full Day</td>
<td>All</td>
<td>Date New Year Day (1st January of every year)</td>
</tr>
<tr>
<td></td>
<td>A Specific Year</td>
<td>Date New Year Day (1st January of the current year)</td>
</tr>
<tr>
<td></td>
<td>All</td>
<td>Date Second half of the Company Annual Day as a holiday every year</td>
</tr>
<tr>
<td></td>
<td>A Specific Year</td>
<td>Date Second half of the Company Annual Day as a holiday for the current year</td>
</tr>
<tr>
<td>Day-of-the-week-specific Holiday</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday and Full Day</td>
<td>All</td>
<td>Day and Occurrence Thanksgiving Day (fourth Thursday of November of every year)</td>
</tr>
<tr>
<td></td>
<td>A Specific Year</td>
<td>Day and Occurrence</td>
</tr>
</tbody>
</table>

### Editing business calendars

To edit a business calendar, complete the following steps:

1. In the Calendar List page, click the business calendar name link in the Name column, whose details you want to change.

   The Calendar Details page is displayed.

   An example of this page is shown in the following figure.
Figure 38: Calendar details page (General section)

This page is same as the Add Calendar page except that the Name field in this page is displayed in read-only mode.

2. Make changes as required in the General, Working Time and Non-working Time sections as explained in the Steps 2, 3 and 4 of the Defining business calendars on page 105.

3. You can click the Calendar View link to go to the Calendar View page, where you can view a particular month’s business calendar.

For more details, see Displaying calendar view on page 112.

4. Click Save to save the current business calendar and go back to the previous page.

To reset the form and remove the information you just entered, click Reset. Click Delete to remove the current business calendar. To cancel the action and exit the current page, click Cancel.

**Note:** You can delete multiple business calendars simultaneously from the Calendar List page. For more details, see Defining business calendars on page 105.

---

Displaying calendar view

After defining the business hours, weekends and holidays; you can see all these in a more convenient, easy to use and familiar layout of a monthly desktop calendar.

To do this, complete the following steps:

1. In the Calendar List page, click the Calendar View icon ( ) in the View column.
2. The Calendar View page is displayed.

An example of this page is shown in the following figure.
3. From the Calendar drop-down list, select the business calendar to be displayed.
4. Select the month and year from the Month and Year drop-down lists respectively.
   The monthly calendar for the selected month and year is displayed. It displays the weekends and holiday(s), if there are any.
   Additionally, it also displays all the holidays in the selected year in a table in chronological order. You can click the date link of a holiday in this table to load the month in which that holiday falls.
5. Optionally, you can perform following operations:
   • mark a day as a holiday,
   • unmark a holiday.
   For more details, see Managing holidays on page 113.
6. You can click the Calendar Details link to go to the Calendar Details page, where you can view/edit the current business calendar.
   This page is same as the Calendar Details page opened from the Calendar List page. For more details, see Editing business calendars on page 111.
7. Click Cancel to go back to the previous page.

Managing holidays

From the Calendar View page you can perform following operations:
• Mark a particular day as a holiday,
• Unmark an existing holiday and make it a normal business day.

Editing a holiday

You cannot edit an existing holiday from the Calendar View; To achieve this, you must first unmark the existing holiday, and then mark the same day as a holiday, with different settings. For more details see Unmarking a holiday on page 114 and Marking a holiday on page 113.

Marking a holiday

You can define a holiday from the Calendar View.
To do this, complete the following steps:

1. In the Calendar View page, use the Calendar, and then Month and Year drop-down lists to load the month in which you want to mark the holiday.
2. Click the date that you want to mark as a holiday.
   The Mark Holiday window is displayed.

   **Figure 40: Mark holiday window**

   ![Mark Holiday Window](image)

3. Specify the Name for the holiday.
4. Choose the Type as a full day holiday or first or second half of the day as a holiday.
5. Click **Save** to mark the holiday and go back to the previous page.
   To reset the form and remove the information you just entered, click **Reset**. To cancel the action and exit the current window, click **Cancel**.

   The new holiday is added in the adjacent table of the list of holidays.

**Unmarking a holiday**

You can delete a holiday and make it as a normal business day from the Calendar View.

To do this, complete the following steps:

1. In the Calendar View page, use the Calendar, and then Month and Year drop-down lists to load the month that contains the holiday to be deleted.
   Optionally, you can click the date link of the holiday in the table listing holidays of the year.
2. Click the date of the holiday that you want to delete.
   The Holiday Details window is displayed.

   **Figure 41: Holiday details window**

   ![Holiday Details Window](image)

   It displays the Date and Name of the holiday in read-only mode.

3. Click **Unmark Holiday** to delete the holiday and go back to the previous page.
   To cancel the action and exit the current window, click **Cancel**.
   The deleted holiday is removed from the adjacent table of the list of holidays.
Setting/Unsetting a default calendar

From the list of business calendars, you can specify a particular business calendar as the default calendar. The default calendar is the business calendar used by Business Process Server for due date calculations when no business calendar is assigned to the user and/or the group.

Once you select a default calendar, if needed, you can deselect it so that you have no default calendar.

To set or unset a default calendar, complete the following steps:

1. In the Calendar List page, to set a default calendar, click the option in the Default Selection column for that calendar.

   Figure 42: Calendar list page

<table>
<thead>
<tr>
<th>No.</th>
<th>Name</th>
<th>Description</th>
<th>View</th>
<th>Default Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>No Calendar</td>
<td>This will set the system default calendar</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Progress Server</td>
<td>India</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Progress Server</td>
<td>USA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   To unset the already specified default calendar, click the option in the Default Selection column for the "No Calendar".

2. Click Save to save the settings and go back to the previous page.

   To reset the form and remove the information you just entered, click Reset.

Opening the default OEBPS calendar

Business Process Server provides the OEBPS Calendar, a predefined business calendar with a standard 8-hour work day, a standard 5-day work week, and the 17 standard United States holidays. You can use the OEBPS Calendar as a template to quickly create your customized business calendars.

To add the predefined OEBPS Calendar as the default calendar on your Calendar List page:
1. Open the Command Prompt window and navigate to the 
%OEBPS_HOME%\conf\resources\common directory.
2. Enter createcalendar sbmcalendar.xml and wait for successful validation.
3. Enter setsystemcalendar sbmcalendar true. The message, "sbmcalendar has been 
set as system calendar" should appear.
4. Navigate to the Calendar List page in Business Process Portal, and the OEBPS Calendar is 
seen as the default system calendar in the list of calendars.

Assigning business calendar to users and groups

As an administrator, you can assign a business calendar to users and groups. The working time 
— that is, business hours and business days — and non-working time — that is, holidays and 
weekends of the assigned business calendars will be applicable to the users and group members. 
For more information about assigning calendars to users, see Creating users on page 157and for 
more information about assigning calendars to groups, see Creating groups on page 167.

If you do not assign any business calendar to the user or group, then the default calendar is used 
for the due date calculations. Such a user can assign a business calendar to him/herself from the 
Home module when he/she clicks Preferences > Calendar for the first time.

If you assign a business calendar to a group, and if the group member has already been assigned 
a different business calendar, then whether the group business calendar or individual business 
calendar should take precedence is decided by the way the task is assigned to the group. If the 
task is to be performed by all group members, then the group business calendar takes precedence. 
However, if the task can be performed by any group member, and if a particular group member 
assigns such a task to him/herself, then that group member’s business calendar takes precedence 
over the group calendar.

Deleting business calendars

You can delete one or more business calendars that you no longer need. To do so, follow these 
steps:

1. In the Calendar List page, select the business calendars that you want to delete. 
   For more details about this operation, see Selecting and clearing rows on page 35.
2. Click Delete.
   Business Process Portal deletes the selected business calendars and they are removed from 
   the list.

Note: You can also delete a business calendar from the Calendar Details page. For more 
details, see Editing business calendars on page 111.

Business calendar restrictions

The following restrictions apply to Business Calendar:

• You must enter a value in each of the fields in the General section of the Add Calendar page.
• The Start Time for a Mid-Day Break cannot be greater than or equal to its End Time.

• You cannot add a day-specific holiday (for example, the fourth Thursday of November) as non-working time in the Business Calendar for a specific year. You can only add day-specific holidays for "All" years.

• Non-working Time takes precedence over Working Time. Therefore, if you want to redefine a Weekend or Holiday as Working Time, then you must first unmark the Weekend or Holiday and then assign it as Working Time.

• You can only unmark a holiday defined for a specific year from the Calendar View page. You cannot unmark a holiday defined for "All" years from this page.

• If you have defined a non-working time for a particular date of a specific year, and then if you add a non-working time for "All" years, then Business Process Server adds the latter entry without any alert message. However, if you have already defined a non-working time for a particular date of "All" years, and then try to define a non-working time for the same date for a specific year, then Business Process Server displays an alert message.

  For example, if you have defined a non-working time for January 1, 2004, then you can define another non-working time for January 1, All years; but the reverse is not possible.

  Similarly, if you have defined a weekend for Sunday, First, then you can define another non-working time for Sunday, All; but the reverse is not possible.

• You cannot configure night shifts in a business calendar.

Commands for calendar management

Business Calendars are typically created and managed from Business Process Portal. Alternatively, the following commands from the %OEBPS_HOME%\bin directory can also be used by the administrator to create and manage the business calendars.

Commands

Table 24: Business calendar commands

<table>
<thead>
<tr>
<th>Command</th>
<th>Description / Business Process Portal equivalent commands</th>
</tr>
</thead>
<tbody>
<tr>
<td>createcalendar.sh/.cmd</td>
<td>Create or replace (with override) calendars. Calendar List page &gt; Add Calendar button</td>
</tr>
<tr>
<td>setsystemcalendar.sh/.cmd</td>
<td>Set a specific calendar as the system calendar. Calendar List page &gt; Default Selection option &gt; Save button</td>
</tr>
<tr>
<td>checkoutcalendar.sh/.cmd</td>
<td>Checkout the calendar XML to a file. No Business Process Portal equivalent command.</td>
</tr>
<tr>
<td>removecalendar.sh/.cmd</td>
<td>Remove a calendar. Calendar List page &gt; Select calendar &gt; Delete button</td>
</tr>
<tr>
<td>listcalendar.sh/.cmd</td>
<td>Lists all calendars. System &gt; Calendars</td>
</tr>
</tbody>
</table>
Working with dashboards

This chapter explains you how to define new dashboards, modify the existing ones, set and assign one to users.

The administrator can define new dashboards or modify the existing ones using Business Process Server’s Dashboard feature, and can assign them to specific users and/or groups.

This chapter explains how an administrator can use the Dashboard feature.

For details, see the following topics:

• Displaying all dashboards
• Defining dashboards
• Modifying an existing dashboard
• Configuring dashboard
• Publishing a dashboard
• Setting a default dashboard
• Deleting a dashboard

Displaying all dashboards

The Dashboard List page lists all the existing dashboards.

• To view the Dashboard List page, in the Administration module, click System > Dashboards.
This page lists all dashboards, as shown in the Figure 43 on page 120.

**Figure 43: Dashboard list page**

<table>
<thead>
<tr>
<th>No</th>
<th>Dashboard Name</th>
<th>Description</th>
<th>Publish</th>
<th>Default Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Performance Dashboard</td>
<td>This will show the Performance dashboard</td>
<td>✔️</td>
<td>🏡</td>
</tr>
<tr>
<td>2</td>
<td>Management Dashboard</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The Dashboard List page lists all the existing dashboards and displays the following information about each dashboard:

**Table 25: Dashboard list information**

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard Name</td>
<td>The name of the dashboard.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the dashboard.</td>
</tr>
<tr>
<td>Publish</td>
<td>Click the checkbox in this column to publish the dashboard.</td>
</tr>
<tr>
<td>Default Selection</td>
<td>Indicates whether the current dashboard is set as the default dashboard or not.</td>
</tr>
</tbody>
</table>

To navigate through the pages, you can use the paging controls. For more details about this operation, see Exploring Business Process Portal on page 28.

From the Dashboard List page, you can perform the following operations:

- Defining a new dashboard.
- Copying an existing dashboard.
- Viewing/modifying an existing dashboard's details.
- Publishing a dashboard.
- Setting a default dashboard for all users/groups.
- Deleting a dashboard.

These operations are explained further in the following sections of this chapter.
Note: If you are using Internet Explorer 7.0 as your browser, then ensure that the "Check for newer versions of stored pages" option in the Temporary Internet file settings is set to "Every time I visit the webpage".

Defining dashboards

You can define a dashboard by defining one manually from scratch or by copying from an existing dashboard.

Defining a new dashboard

To define a new dashboard, complete the following steps:

1. In the Dashboard List page, click Create Dashboard.

   The Create Dashboard page, containing General and Users/Groups sections, is displayed enabling you to enter the new dashboard information.

   An example of this page is shown in the following figure.

   Figure 44: Dashboard details page (General section)

2. In the General section, enter relevant data, as explained below:

   a) Specify a name and description for the dashboard in the Name and Description boxes respectively.
Note: You should not use the following special characters in the name or description while defining a dashboard:

For Name: <, >, ", . , %, (, ), & +, |, ^, # .

For Description: <, >, ", . , %, (, ), & +, |, ^, | |

b) From the Layout drop-down list, select a layout to be used to arrange the components in the new dashboard.

For example, if you select TwoColumns70-30 layout, then the first column of components occupies 70% of the dashboard width and the second column occupies 30%.

3. Click Component icon.

The Add Dashboard Component window is displayed.

An example of this window is shown in the following figure.

Figure 45: Dashboard details page and add dashboard component window

a) If you want to add an application specific component, then from the Application Name drop-down list, select the name of the application.

b) To add a component that works across all applications, select All.

Based on your selection of application in the previous step, the Category drop-down list provides you appropriate options.

c) From the Category drop-down list, click the category to which you want to add the dashboard component.

d) From the Component drop-down list, select the widget to be used in the current component.

If you have selected a particular application in the previous step, then this list displays only the widget(s) defined for that application while creating the application in Progress Developer Studio for OpenEdge. For more information about creating widgets, see OpenEdge Getting Started: Developing BPM Applications with Developer Studio. If you have selected All in the previous step, then this list displays the out-of-box widgets.

e) Specify a name and description for the dashboard in the Title and Description boxes respectively.
Defining dashboards

---

**Note:** You should not use the following special characters in the name or description while defining a dashboard:

<, >, ',v, &, ;, +, \ and |.

---

4. Open the Users/Groups section to assign the current dashboard to existing user(s) and/or group(s).

An example of the this page is shown in the following figure.

**Figure 46: Dashboard details page (Users/Groups section)**

- To assign the current dashboard, click **Add**.

  The **Add Users & Groups** window is displayed.

- Search and locate users or groups. For more details, see Searching Users on page 40.

- Click **Add** to add the selected users and/or groups and go back to the previous page.

  To cancel the action and exit the current window, click **Cancel**.

- To delete cancel an assignment to the user/group, select the user and/or group for whom you want to cancel the dashboard assignment, and click **Remove**.
Note: Alternatively, you can also assign a dashboard to a user from the User Details page. For more information, see Creating users on page 157. Similarly, you can assign a dashboard to a group from the Group Details page. For more information, see Creating groups on page 167.

5. Click Save to define the new dashboard and go back to the previous page.
   To reset the form and remove the information you just entered, click Reset. To cancel the action and exit the current page, click Cancel.

Copying an existing dashboard

To create a new dashboard by copying from an existing dashboard, complete the following steps:

1. In the Dashboard List page, click Copy Dashboard.
   The Copy Dashboard window is displayed. An example of this window is shown in the following figure.
   Figure 47: Copy dashboard window

2. From the Dashboard drop-down list, select the dashboard to be used as a source for copying.
3. In the Save a Copy As box, enter the name with which the copied dashboard is to be saved.
4. Click Save to copy the dashboard and go back to the previous page.
   To reset the form and remove the information you just entered, click Reset. To cancel the action and exit the current page, click Cancel.

Modifying an existing dashboard

To edit an existing dashboard, complete the following steps:

1. In the Dashboard List page, click the dashboard name link in the Dashboard Name column, whose details you want to change.
   The Edit Dashboard Details page appears.
   An example of this page is shown in the following figure.
This page is same as the **Dashboard Details** page displayed while defining a dashboard except that the Name field in this page is displayed in read-only mode.

2. Make changes as required in the General, Component and Users/Groups sections as explained in the Steps 2, 3 and 4 of the **Defining a new dashboard** on page 121.

**Note:** You cannot edit the name of the current dashboard.

3. Click **Save** to save the current dashboard and go back to the previous page.

To reset the form and remove the information you just entered, click **Reset**. To cancel the action and exit the current page, click **Cancel**.

**Note:** You can delete multiple dashboards simultaneously from the **Dashboard List** page. For more details, see **Deleting a dashboard** on page 128.

### Configuring dashboard

This section guides you to configure auto-refresh for dashboard widgets.

#### Configuring auto-refresh for the widgets

Configuring auto-refresh for widgets helps to automatically refresh the dashboard content after specified time.

To configure this feature you must update `bpmportal.conf` file. This file is located at `<OEBPS_HOME>/conf` folder.

The properties listed in the following table are required to configure auto-refresh for widgets:
Table 26: Configuring auto-refresh for widgets

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
<th>Possible values</th>
</tr>
</thead>
<tbody>
<tr>
<td>bpmportal.widget.autorefresh</td>
<td>If set to true, it refreshes the dashboard widget after the specified refresh interval.</td>
<td>True, False Default - True</td>
</tr>
<tr>
<td>bpmportal.widget.autorefresh.interval</td>
<td>Refreshes the widget automatically after the specified interval provided. Auto-refresh should be enabled for this.</td>
<td>Specify the value in seconds. Default - 600 secs.</td>
</tr>
<tr>
<td>bpmportal.widget.autorefresh.target</td>
<td>Specify the target widget for which you must enable auto-refresh.</td>
<td>OEBPS, ALL Default - NAR</td>
</tr>
</tbody>
</table>

Enabling auto refresh

Widget auto-refresh can be enabled by setting the property `bpmportal.widget.autorefresh` to `true`.

This property is used to control only OEBPS widgets in Business Process Portal. This is not applicable for non-OEBPS widgets. On setting this property, auto refresh is enabled for all OpenEdge widgets depending on the target specified.

The default refresh interval value is 600 secs.

Setting target

You can enable auto-refresh for OEBPS. For this you can specify the target at `bpmportal.widget.autorefresh.target`. The default value is `NAR` (no auto refresh). The valid values are 'NAR', 'OEBPS' and 'ALL' (case insensitive).

Publishing a dashboard

After defining a dashboard, you must publish it to make it accessible to other users. Other Business Process Server users can view only the dashboards that are published and assigned to them.

To publish a dashboard, follow these steps:

1. In the Dashboard List page, select the dashboards that you want to publish by clicking the check boxes in the Publish column.
   
   For more details about this operation, see Selecting and clearing rows on page 35.

2. Click Save.

Business Process Portal publishes the selected dashboards.
Setting a default dashboard

From the list of dashboards, you can specify a particular dashboard as the system-level default dashboard for all users and groups. Business Process Portal uses this system-level dashboard for all users and/or groups for whom no dashboard is assigned.

To set a default dashboard, complete the following steps:

1. In the Dashboard List page, click the option in the Default Selection column for that dashboard.
   
   To specify the Performance Dashboard as a default dashboard, click the option in the Default Selection column for the Performance Dashboard.

2. Click Save to set the selected dashboard as the default dashboard and go back to the previous page.
   
   To reset the form and remove the information you just entered, click Reset.

Dashboard precedence

As a Business Process Server administrator, you can specify a particular dashboard as the system-level default dashboard for all users and groups. You can also assign dashboards to users and groups individually.

If no dashboard is assigned to a user, then the dashboard assigned to that user’s group gets assigned to him/her. If no dashboard is assigned to a user and his/her group, then the system-level dashboard (defined for all users) gets assigned to him/her.

If you do not define any dashboard, then an out-of-the-box dashboard (bundled with Business Process Server) becomes the system-level default dashboard. The order of precedence of dashboard is as follows:

Table 27: Dashboard precedence

<table>
<thead>
<tr>
<th>Priority</th>
<th>Dashboard type</th>
<th>Defined by ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Dashboard assigned to you</td>
<td>Business Process Server administrator</td>
</tr>
<tr>
<td>2</td>
<td>Dashboard assigned to your group</td>
<td>Business Process Server administrator</td>
</tr>
<tr>
<td>3</td>
<td>System-level dashboard for all users</td>
<td>Business Process Server administrator</td>
</tr>
<tr>
<td>4</td>
<td>Out-of-box dashboard with default components</td>
<td>Business Process Server</td>
</tr>
</tbody>
</table>
Deleting a dashboard

You can delete one or more dashboards that you no longer need.

To do so, follow these steps:

1. In the Dashboard List page, select the dashboards that you want to delete.
   
   For more details about this operation, see Selecting and clearing rows on page 35.

2. Click Delete.

   Business Process Portal deletes the selected dashboards and they are removed from the list.

---

**Note:** The Performance Dashboard cannot be deleted.
Working with widgets

This chapter describes how an administrator can view the widget list for a specific dashboard and how to publish OpenEdge widgets to Progress Control Tower (PCT).

For details, see the following topics:

- Displaying widgets
- Exporting widgets to PCT
- Deploy application pack to PCT

Displaying widgets

The Widgets List page lists all the existing widgets for a specific dashboard.

To view the Widgets List page, in the Administration module, do the following:

1. Click System > Widgets.
2. Select a dashboard from the Dashboard drop-down list.
3. Click Search.

The Widget List page appears, as shown in Figure 49 on page 130.
Figure 49: Widget list page

The **Widget List** page lists all the existing widgets and displays information about each widget as described in **Table 28** on page 130:

**Table 28: Widget list information**

<table>
<thead>
<tr>
<th>Column name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Widget Name</td>
<td>Provides the name of the widget. The widget name is specified in the <strong>Widget Properties – General Tab</strong> dialog box in Progress Developer Studio for OpenEdge.</td>
</tr>
<tr>
<td>Application</td>
<td>Provides the name of the application with which a widget was deployed.</td>
</tr>
<tr>
<td>Chart Type</td>
<td>Provides the chart type values of a widget. The chart type value of a widget is a value specified in the <strong>Widget Properties dialog box – Properties Tab</strong> dialog box in Progress Developer Studio for OpenEdge. The Chart Type column can have any one of the following values: Area, Line (2D and 3D), Meter, Vertical Bar (2D and 3D), Horizontal Bar (2D and 3D), Pie (2D and 3D), Doughnut (2D and 3D), Funnel, Pyramid, and Bar 3D Line.</td>
</tr>
<tr>
<td>Category</td>
<td>Provides the category name of a widget. The category name of a widget is a value specified in the <strong>Widget Properties – General Tab</strong> dialog box in OpenEdge. The widgets provided in the Performance dashboard have <strong>OpenEdge</strong> as the default category name.</td>
</tr>
<tr>
<td>Description</td>
<td>Provides the description of a widget. The widget description is a description specified in the <strong>Widget Properties – General Tab</strong> dialog box in OpenEdge.</td>
</tr>
<tr>
<td>Export (出口) icon</td>
<td>Enables you to export a selected widget to PCT.</td>
</tr>
</tbody>
</table>

To navigate through the pages, you can use the paging controls. For more details about this operation, see **Exploring Business Process Portal** on page 28.
Exporting widgets to PCT

You can export the widgets defined in the Widgets List page to PCT as described in this section.

To export a widget, do the following:

1. Navigate to System > Widgets page.
2. Select a Dashboard and then click Search.
3. Click the Export ( ) icon in the Widget list page.

The Export Widget for PCT dialog box appears as shown in the following figure.

![Export Widget for PCT dialog box](image)

The Export Widget for PCT dialog box has the following fields:

- Widget Name
- Application
- Category
- PCT URL
- PCT Application Id
- Portal Height

The fields Widget Name, Application, and Category are OpenEdge widget attributes. If you have defined a custom widget in OpenEdge, then the application with which this widget is deployed is displayed in the dialog box. The application field is blank for Out Of Box (OOB) widgets which are a part of the Performance dashboard.

4. Provide the PCT URL.
5. Optionally provide the Portlet Height if required.
6. Click OK to export the widget to PCT.

Deploy application pack to PCT

You can deploy OpenEdge application pack to PCT.

Perform the following:

1. Go to Administration > System > Deploy Application Pack to PCT.
   
   The Export OpenEdge Application Pack to PCT dialog appears.

2. Enter the PCT URL. This is the url in the format `<protocol>://<pct host>:<pct port>`.
3. Click OK.
The application pack is deployed to PCT.
Managing attributes

This chapter explains how to use the Administration module of Business Process Portal to manage attributes. The Attribute List page enables the Business Process Server administrator to create, view, update and remove attributes associated with all the processes checked-in in the repository. For details, see the following topics:

- Managing attributes

Managing attributes

An attribute is a label that you can use to tag or mark your process. Attributes are generally used by the Progress Developer Studio for OpenEdge and Business Process Modeler. For your convenience, Business Process Portal provides the following predefined attributes. The following table provides more information about these predefined attributes.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>The objective of the process. For example, to automate the order processing.</td>
</tr>
<tr>
<td>Goal</td>
<td>The goal of the process. For example, to reduce the order processing cost by 10%.</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Organizational Unit</td>
<td>The scope of the process within the organization. For example, Sales and Distribution.</td>
</tr>
<tr>
<td>Influencers</td>
<td>The entities affected by the process. For example, Sales Staff, Customers, Partners, and Dealers.</td>
</tr>
<tr>
<td>Process Type</td>
<td>The scope of the process type. The default values are BusinessProcess, MonitoringProcess, and SystemProcess.</td>
</tr>
<tr>
<td>Risks</td>
<td>The risks involved. For example, Time and money for training.</td>
</tr>
<tr>
<td>Rewards</td>
<td>The benefits of the process. For example, High customer satisfaction, High retention, Increased revenue.</td>
</tr>
<tr>
<td>Executable</td>
<td>Whether the process is executable or not. For example, Yes.</td>
</tr>
</tbody>
</table>

Business Process Portal enables you to manage attributes by displaying information about existing attributes, adding new attributes, removing attributes, updating existing attributes.

You can manage attributes from the Administration module of Business Process Portal by using the Attribute List page as illustrated in Displaying information about an attribute on page 134. You can perform the following tasks from this page:

- Display information about an existing attribute.
- Search for one or more existing attributes.
- Create and remove attributes.
- Update the attribute information.

**Displaying information about an attribute**

To view the Attribute List page, in the Administration module, click **System > Attributes**. This page lists all current attributes, as shown in the following figure.
Managing attributes

Figure 50: Attribute list page

The Attribute List page displays the following information about each attribute:

Table 30: Attribute list information

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the attribute.</td>
</tr>
<tr>
<td>Label</td>
<td>The label of the attribute.</td>
</tr>
<tr>
<td>Initial Value</td>
<td>The initial value for the attribute.</td>
</tr>
<tr>
<td>Values</td>
<td>All possible values available for the attribute.</td>
</tr>
<tr>
<td>Editable</td>
<td>Whether the attribute's value can be changed.</td>
</tr>
<tr>
<td>Required</td>
<td>Whether the attribute is mandatory.</td>
</tr>
</tbody>
</table>

You can search for a particular attribute using the Search Bar. The procedure for searching attributes is very similar to that of searching the users. For more details about this, see Searching Users on page 40. It lists the attributes satisfying your search criteria. To view the list of all attributes again, click All in the Quick Search. To manage the contents of the list, you can sort them. To navigate through the pages, you can use the paging controls. For more details about these operations, see Exploring Business Process Portal on page 28.

From the Attribute List page, you can:

- Add attributes.
- View/modify attribute details.
- Delete an attribute.

These operations are explained further in this chapter in the following sections.
Adding attributes

To create an attribute, complete the following steps:

1. In the Attribute List page, click Add Attribute.

   The Add Attribute page is displayed enabling you to create a new attribute.

   An example of this page is shown in the following figure.

   **Figure 51: Add attribute page**

   ![Add Attribute Page](image)

   2. In the Name, Label and Description text boxes, enter a name, a label and some additional information about the attribute respectively.

   The fields marked with a red asterix are required fields.

   **Note:** The attribute name must contain only alphanumeric characters.

   3. In the Value text box, enter a possible value for the attribute, and click Add.

   This value is added in the Initial Value drop-down list. To remove a value from this list, select it and click Delete.

   4. Select the Editable checkbox if you want to allow the users to change the value of this attribute.

   5. Select the Required checkbox if you want to make this a mandatory attribute.

   6. Click Save to add the new attribute and go back to the previous page.

   Click Save & Add New to save the current attribute and reload the current page to continue adding another attribute.

   To reset the form and remove the information you just entered, click Reset. To cancel the action and exit the current page, click Cancel.

Deleting attributes

You can delete a particular attribute that you no longer need.

To do so, follow these steps:
Managing attributes

1. In the **Attribute List** page, select the attribute that you want to delete.
   
   For more details about this operation, see Selecting and clearing rows on page 35. If needed, first search the attributes.

2. Click **Delete**.
   
   Business Process Portal deletes the selected attribute and it is removed from the list.

| **Note:** You can simultaneously delete multiple attributes. To do this, in the **Attribute List** page, select multiple attributes and then click **Delete**. Business Process Portal deletes all the selected attributes. |

### Updating attribute information

To update attribute information, complete the following steps:

1. In the **Attribute List** page, click the attribute name hyperlink in the **Name** column, whose details you want to update.
   
   The **Attribute Details** page is displayed.

   An example of this page is shown in the following figure.

   **Figure 52: Attribute details page**

   ![Attribute Details page](image)

2. Enter/modify the relevant data as necessary.

3. Click **Save** to save the changes and go back to the previous page.

   To reset the form and remove the information you just entered, click **Reset**. To cancel the action and exit the current page, click **Cancel**.
Using the audit events page

This chapter explains how to use the Administration module of Business Process Portal to view an audit trail of events for applications. You can view the audit trail for a process instances using the Home module. For more information about it, see "Chapter 7, Working with My Instances" in the "Business Process Portal User’s Guide".

For details, see the following topics:

• Audit events page

Audit events page

Business Process Server enables you to view an audit trail of events that have occurred during the flow of a process, and selectively see the details of any of the listed events. For example, you can see how the performer of a work item has changed throughout a process, or how the value of a specific dataslot has changed for a series of worksteps.

You can view an audit trail of events in the Administration module of Business Process Portal by selecting Audit Events, opening the Audit Events page as illustrated in Viewing an audit trail of events on page 140. You can perform the following tasks from this page:

• View the list of audited events for a particular application.
• View the details of a particular audited event.
Viewing an audit trail of events

To view an audit trail of events, follow these steps:

1. In the Administration module, click System > Audit Events.
   
The Audit Events page is displayed.

2. From the Application drop-down list, select the application for which you want to view the events.

3. If you want to filter the events for a specific instance ID, then enter the ID in the Instance ID text box.
   
If you know the first digit (left most number) of the instance ID; when you enter it, then Business Process Server lists all instance IDs beginning with the specified digit. You can select the desired one from the list. You can enter multiple instance IDs by specifying a comma separated list of instance IDs. After selecting one instance ID from the list, you can enter a comma and enter the first digit of another instance ID. For example, if there are instances with IDs 254, 333, 340, 348 and 350. When you enter 3, Business Process Server will list 333, 340, 348 and 350. When you enter 4 after 3 and make it 34, Business Process Server will list only 340 and 348. To select 340 and 348, you can select 340 from the list, enter a comma and again enter enter 34. Business Process Server will now list only 348. You can select it.

If you do not enter any instance ID, then Business Process Server lists events of all instances of the specified application.

4. From the Audit Event Type drop-down list, select the type of event that you want to review, and then click Go.

P represents Process; PI represents Process Instance; W represents Workstep, I represents Work item; and S represents Save.

The filters you use in Steps 2-4 can help you narrow down your search for specific information. The following table explains the list of audit events type available.

<table>
<thead>
<tr>
<th>Audit Event Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P.Created</td>
<td>Process template creation.</td>
</tr>
<tr>
<td>P.Installed</td>
<td>Process template installation.</td>
</tr>
<tr>
<td>P.Removed</td>
<td>Process template removal.</td>
</tr>
<tr>
<td>P.Resumed</td>
<td>Process template resumed.</td>
</tr>
<tr>
<td>P.Suspended</td>
<td>Process template suspension.</td>
</tr>
<tr>
<td>PI.Created</td>
<td>Process instance creation.</td>
</tr>
<tr>
<td>PI.Activated</td>
<td>Process instance activation.</td>
</tr>
<tr>
<td>PI.Suspended</td>
<td>Process instance suspension.</td>
</tr>
<tr>
<td>PI.Resumed</td>
<td>Process instance resumed.</td>
</tr>
<tr>
<td>PI.Completed</td>
<td>Process instance completion.</td>
</tr>
<tr>
<td>Audit Event Name</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>PI.PrioritySet</td>
<td>Process instance priority is set.</td>
</tr>
<tr>
<td>PI.DueDateSet</td>
<td>Process instance due date is set.</td>
</tr>
<tr>
<td>PI.Removed</td>
<td>Process instance removal.</td>
</tr>
<tr>
<td>PI.CreatorSet</td>
<td>Process instance creator is set.</td>
</tr>
<tr>
<td>PI.AttributeSet</td>
<td>Process instance attributes are set.</td>
</tr>
<tr>
<td>PI.DataslotsSet</td>
<td>Process instance dataslots are set.</td>
</tr>
<tr>
<td>W.Created</td>
<td>Workstep instance creation.</td>
</tr>
<tr>
<td>W.Activated</td>
<td>Workstep instance activation.</td>
</tr>
<tr>
<td>W.Suspended</td>
<td>Workstep instance suspension.</td>
</tr>
<tr>
<td>W.Resumed</td>
<td>Workstep instance resumed.</td>
</tr>
<tr>
<td>W.Completed</td>
<td>Workstep instance completion.</td>
</tr>
<tr>
<td>W.PrioritySet</td>
<td>Workstep instance priority is set.</td>
</tr>
<tr>
<td>W.DueDateSet</td>
<td>Workstep instance duedate is set.</td>
</tr>
<tr>
<td>W.PerformerSet</td>
<td>Workstep instance performer is set.</td>
</tr>
<tr>
<td>W.EventActivation.Wait</td>
<td>A monitoring workstep enters into wait state for an activation event.</td>
</tr>
<tr>
<td>I.Created</td>
<td>Work item creation.</td>
</tr>
<tr>
<td>I.Activated</td>
<td>Work item activation.</td>
</tr>
<tr>
<td>I.Available</td>
<td>Work item is made available to one or more users.</td>
</tr>
<tr>
<td>I.Assigned</td>
<td>A work item is assigned or reassigned to a user.</td>
</tr>
<tr>
<td>I.Completed</td>
<td>Work item completion.</td>
</tr>
<tr>
<td>I.Priority</td>
<td>Work item priority is set.</td>
</tr>
<tr>
<td>I.DueDate</td>
<td>Work item due date is set.</td>
</tr>
<tr>
<td>I.Performer</td>
<td>Work item performer is set.</td>
</tr>
<tr>
<td>I.Suspended</td>
<td>Work item suspension.</td>
</tr>
</tbody>
</table>
Business Process Server displays all the audit events satisfying the filter condition and the following information about each instance id:

**Table 31: Audit events information**

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audit Event ID</td>
<td>The ID of the audit event.</td>
</tr>
<tr>
<td>Audit Event Name</td>
<td>The name of the audit event type.</td>
</tr>
<tr>
<td>Date Created</td>
<td>The date when the audit event was created.</td>
</tr>
<tr>
<td>Instance ID</td>
<td>The ID of the application instance.</td>
</tr>
</tbody>
</table>

5. To view more details of a particular event, click the +/- sign in the Audit Event ID column for that event. Business Process Server displays further details about it in read-only mode.
Figure 54: Details of an audit event

You can click the +/- sign in the Audit Event ID column again to collapse the audit event details.
Managing users

The chapter explains how to configure user management systems and realms, and how to use the Administration module of Business Process Portal to manage Business Process Server user accounts.

For details, see the following topics:

• Configuring user management
• Managing user accounts
• Password policy
• Delegating tasks to users

Configuring user management

Business Process Server includes a user management mechanism that is capable of supporting multiple directory service architectures. It enables you to configure Business Process Server to effectively use your existing directory service. This section explains how Business Process Server supports the directory service architectures, which are also known as realms.

Understanding realms

Business Process Server supports the following directory services or realms:
Table 32: User management realms

<table>
<thead>
<tr>
<th>Realm</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>JDBC Realm</td>
<td>The JDBC realm is a user management system built on a database. It reads user, password, group, and Business Process Server specific information from the database. It also provides password encryption. Note: Recursive groups are not supported for JDBC realms.</td>
</tr>
<tr>
<td>LDAP</td>
<td>The LDAP realm employs the LDAP directory service to retrieve user, password, and general group information. Other Business Process Server-specific information is retrieved from the database. LDAP runs over TCP/IP and features a hierarchical structure. Business Process Server supports Sun Java System Directory Server 5.2 and MS Active Directory for Windows 2000.</td>
</tr>
<tr>
<td>LDAP hybrid</td>
<td>The LDAP hybrid realm uses a combination of LDAP realm and Business Process Server database. Typically, the LDAP realm is used for authentication and Business Process Server database is used to store groups related information.</td>
</tr>
<tr>
<td>OERealm</td>
<td>The OEHybrid realm is a combination of the JDBC realm and the OpenEdge AppServer based service. Business Process Server (BP Server) supports the single point of authentication (SPA) service using the OEHybrid realm.</td>
</tr>
</tbody>
</table>

Note: Passwords are case sensitive in all realms. For more information, see Case sensitivity for user management on page 146.

Java interfaces for user management
Business Process Server provides three Java interfaces for user management:

- com.tdiinc.userManager.Group
- com.tdiinc.userManager.Realm
- com.tdiinc.userManager.User

By implementing these interfaces, you can easily plug in a new realm (a new user manager) into the Business Process Server system. The interfaces are in the um.jar file, which is in the OEBPS_HOME\lib directory.

Case sensitivity for user management
A user name and group name in the JDBC realm may or may not be case sensitive, depending on the following parameters:

usermgr.casesensitive in umacl.conf file in OEBPS_HOME/conf directory.
oebps.usermanager.casesensitive in oebps.conf file in OEBPS_HOME/conf directory.
Ensure that the values of both these parameters are consistent. Additionally, if you use the LDAP, LDAP hybrid, or OEHybrid realms, then ensure that the case sensitivity parameters set in Business Process Server are consistent with the case sensitivity parameters set in your LDAP, LDAP hybrid, or OEHybrid realms.

### Using OEHybrid realm for Single Point of Authentication

OpenEdge single point of authentication (SPA) is used in realm-based systems. Business Process Server supports SPA service using the OEHybrid realm. The OEHybrid realm uses a combination of the JDBC realm and the OpenEdge AppServer-based service.

#### OEHybrid realm implementation

In the OEHybrid realm, the OpenEdge AppServer-based single point of authentication (SPA) service authenticates users against the OpenEdge database to which the AppServer is connected, while the JDBC realm supports Business Process Server for groups, user attributes, and permissions.

You can create the SPA service by implementing the built-in `Progress.Security.Realm.IHybridRealm` interface. You must implement the interface as a `SINGLETON` class. An interface implementation `OpenEdge.Security.Realm.HybridRealm.cls` class file is available in your Progress OpenEdge installation directory at `$DLC\src\samples\security\OpenEdge\Security\Realm`. A utility class `OpenEdge.Security.Util.Properties.cls` for property file support is available in `$DLC\src\samples\security\OpenEdge\Security\Util`.

Before configuring the BP Server to use the SPA service, you must deploy the authentication service class file `OpenEdge.Security.Realm.HybridRealm.cls` and property file `OpenEdge.Security.Util.Properties.cls` on an OpenEdge AppServer running in state-free operating mode.

**Note:** By default, the `bpsbroker` defined for an AppServer is in state-free operating mode and the `asbroker` defined for an AppServer is in state-reset operating mode.

The reference implementation uses the `_User` table of the OpenEdge database to which the AppServer is connected to access an user’s account information. For more information on configuring reference implementation and populating `_User` table of an OpenEdge database, see the `OpenEdge Single Point of Authentication (SPAInstructions.pdf)` document in your OpenEdge installation directory at `$DLC\src\samples\security`.

In addition, refer to the `Progress Developer Studio for OpenEdge Guide` for information on creating an OpenEdge database, and associating the database to an OpenEdge AppServer.

#### Configuring reference implementation properties

The reference implementation uses a property file that contains information used to lock the authentication service. A SPA client reads a sealed client-principal file and then sends the file when it communicates with the authentication service. The authentication service validates the seal by using the domain password, and then validates the role of the client-principal to see if it matches.

A default property file `spaservice.properties` is provided in `$DLC\src\samples\security`. You must copy this property file to your working directory `$WRKDIR`. 

---

The property file contains these default values:

**Table 33: Property file parameters**

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Default value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password</td>
<td>oe9h1:20e33333452sa2137</td>
<td>Password is the encoded domain password of the sealed client-principal.</td>
</tr>
<tr>
<td>Role</td>
<td>SpaClient</td>
<td>Role is the role that the client-principal role is compared to.</td>
</tr>
<tr>
<td>DebugMsg</td>
<td>False</td>
<td>DebugMsg will enable log messages in the AppServer server log file for the SPA service.</td>
</tr>
</tbody>
</table>

The default client-principal file `spadefault.cp` located in your installation directory at `$DLC\src\samples\security`, uses a password that corresponds to the encoded "Password" value in the table, and the role “SpaClient”. For information on generating your own client-principal file using the `genspacp` utility, see Generating a sealed client-principal file on page 149.

**OEHybrid realm configuration**

You must specify custom authentication OEHybrid realm in Business Process Server to implement SPA. The OEHybrid realm configuration information is stored in the `umacl.conf` file. To modify the OEHybrid realm configuration values, modify the `umacl.conf` file located in the `OEBPS_HOME\conf` directory. The parameters are listed in the following table:

**Table 34: OEHybrid realm configuration parameters**

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>usermgr.realm.type</td>
<td>Specifies the realm type for user management. Set the parameter value to custom.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> The default value is <code>jdbc</code>.</td>
</tr>
<tr>
<td>usermgr.realm.provider</td>
<td>Specifies the OEHybrid realm provider name. Set the User Manager parameter to <code>com.savvion.usermanager.OERealm</code>.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> By default, the provider value is blank.</td>
</tr>
<tr>
<td>oauth.server.location</td>
<td>Specifies the URL to an AppServer that provides the SPA service. Set the parameter value to <code>AppServer://localhost/bpsbroker1</code></td>
</tr>
<tr>
<td>oauth.server.provider</td>
<td>Specifies the class name of the OEHybrid realm implementation that provides the SPA service. Set the parameter value to <code>OpenEdge.Security.Realm.HybridRealm</code>.</td>
</tr>
</tbody>
</table>
### Parameter Description

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>oauth.server.authmethod</code></td>
<td>Method used to validate a password. Set the parameter value to <code>digest</code>.</td>
</tr>
<tr>
<td><code>oauth.server.clientprincipal</code></td>
<td>Specifies the client principal file used to authorize SPA clients. Set the parameter value to <code>spadefault.cp</code>.</td>
</tr>
</tbody>
</table>

### Group administration in Business Process Portal

When you use a custom realm, the option for adding and removing groups, and adding and removing users within a group does not appear in the Business Process Portal.

To enable group management when you use the OEHybrid realm, modify the `bpmportal.conf` file located in the `OEBPS_HOME\conf` folder. The configuration parameters are listed in the following table:

#### Table 35: Group management parameters for OEHybrid realm

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>bpmportal.customrealm.managegroup</code></td>
<td>Set the parameter to <code>true</code> to enable Business Process Portal for managing groups such as add, modify, and delete in a custom realm.</td>
</tr>
</tbody>
</table>

**Note:** The default value is `false`.

### Generating a sealed client-principal file

You can use the `genspacp` utility to generate a sealed client-principal file for use with the single point of authentication service.

To use the utility:

1. Go to **Windows Start > Programs**, select **Progress > OpenEdge > Proenv**. A command shell window opens and displays information about your OpenEdge installation. The command at the prompt is:

   `proenv>`

2. Enter the following command:

   ```bash
genspacp -password <text> [-user <text> -domain <text> -role <text> -file <text>]
   ```

   **Where:**
   - `-password`: (Required) The domain password used to seal the client-principal object.
   - `-user`: (Optional) The user name set in the client-principal. The default name is BPSServer.
   - `-domain`: (Optional) The domain name set in the client-principal. The default domain name is OESPA.
   - `-role`: (Optional) The role set in the client-principal. The default role is SPAClient.
• –file: (Optional) The name of the file to which the client-principal object is saved. The default file name is oespaclient.cp.

3. Do the following:
   a) Copy the generated encoded password value to the Password property of the spaservice.properties file to use the client-principal. The property file is located in your installation directory at $DLC\src\samples\security.
   b) Copy the generated client-principal file to the OEBPS_HOME\conf directory. By default, the client-principal is created in your working directory $WRKDIR.
   c) In the umacl.conf file, update the oeauth.server.clientprincipal parameter value with the client-principal file name generated in the previous step. This client principal file is used to authorizes SPA clients. The umacl.conf file is located in the OEBPS_HOME\conf directory.

Logging in with default Business Process Server's user credentials

To log in to Business Process Portal using the default Business Process Server credentials "admin" as the username and password, you must add the default admin user details to the _User table of the OpenEdge database that is associated with the OEHybrid realm. For more information on populating the _User table of an OpenEdge database, see the OpenEdge Single Point of Authentication (SPAInstructions.pdf) document in your OpenEdge installation directory at $DLC\src\samples\security.

Alternatively, you can add an admin account to the JDBC realm of an existing OEHybrid realm user and grant the user administrator permissions. For more information on creating users and managing user permissions, see the Managing user accounts on page 155.

**Note:** Before you log in to Business Process Portal, ensure that both the OpenEdge AppServer and Business Process Server are running.

When you switch over to the custom OEHybrid authentication realm and log in to Business Process Portal using the admin user, the OpenEdge SPA service authenticates the admin user credentials against the OpenEdge database associated with the AppServer on which the service is running, while BP Server manages the user permissions.

**Note:** You cannot have a blank password to login to Business Process Portal. You must specify the username and password fields when adding users to the _User table of the OpenEdge database that is configured with the OEHybrid realm.

Using the LDAP realm

The LDAP Realm configuration information is stored in the umacl.conf file. Under normal circumstances, Business Process Server supplies the correct settings in the umacl.conf configuration files. However, you might need to modify these files if you choose to use the LDAP Realm following Business Process Server installation.

**Note:** If you choose the LDAP Realm, then the option of adding and removing users and groups, and adding and removing users within a group does not appear in the interface.
You can use the `usermgr.additionalstorage` parameter in `umacl.conf`. This parameter specifies where the OEBPS specific information for user manager is stored. This parameter applies to NIS and LDAP only. For example, you can store the first name and last name of a user, or the language setting for an LDAP realm; or portal level configurations that are granted to users and groups. Although the parameter provides a choice between database and file options, we recommend you use the default value, `database`, rather than the `file` option. If you choose `database`, then the user details are stored in Business Process Server database. If you choose `file` option, then the user details are stored in `usermgr.additionalstorage` parameter in `umacl.conf`.

You can specify this parameter by editing the `umacl.conf` file. This file is available in `OEBPS_HOME\conf` folder.

### LDAP realm configuration

LDAP is a software protocol for enabling anyone to locate organizations, individuals, and other resources such as files and devices in a network, whether on the Internet or on a corporate intranet. Business Process Server, when configured to LDAP realm, supports Sun Java System Directory, or Active Directory.

### Modifying LDAP realm configuration

To modify the LDAP realm configuration values, modify the following parameters in `umacl.conf` file located at `OEBPS_HOME\conf` folder. The parameters are listed in the following table:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>ldap.server.provider</code></td>
<td>Provide the LDAP server provider name. If you use Active Directory, then set this parameter to &quot;MSActive.&quot; If you use Sun Java System Directory, then set this parameter to &quot;Netscape.&quot; Note: Using the &quot;Netscape&quot; value requires you to set the User Manager parameter to &quot;com.tdiinc.com.userManager.LDAPRealm.&quot;</td>
</tr>
<tr>
<td><code>ldap.server.location</code></td>
<td>This parameter specifies the location of the LDAP server.</td>
</tr>
<tr>
<td><code>ldap.ssl</code></td>
<td>This is an optional parameter. This specifies whether the LDAP connection is based on SSL or not. The default value for this parameter is blank.</td>
</tr>
<tr>
<td><code>ldap.user.name</code></td>
<td>A proper account is usually required to access the LDAP server. For example, a user account may be: uid=ebms, ou=people, o=progress, dc=com for the Sun Java System Directory server, and cn=ebms, ou=users, dc=progress, dc=com for the Active Directory server. The LDAP server may be configured in a way that anonymous users can read information from the LDAP server. In this case, these two parameters may be left blank. For more information, refer to your LDAP server documentation.</td>
</tr>
<tr>
<td><code>ldap.user.password</code></td>
<td></td>
</tr>
</tbody>
</table>
These two parameters specify in `umacl.conf` where the "User" and "Group" objects are stored in a Directory Information Tree (DIT). Business Process Server searches only the "User" objects within the subtree "ldap.user.search.root" and "Group" objects within the subtree "ldap.group.search.root." You may set these two parameters to the root of the whole DIT or to a very low-level node. The lower the node you set, the more efficient the search is. You may also set multiple values for these parameters separated by a "." For example, `ou=groups,o=progress.com|ou=depts,o=progress.com`.

### Non-Standard LDAP schema configuration parameters

The parameters describing this LDAP schema are presented in the following table:

#### Parameters

Table 37: Non-Standard LDAP schema configuration parameters

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>user.name.attr</code></td>
<td>Specifies the attribute name considered the user name in Business Process Server. Assume this attribute is unique among user objects in LDAP. Business Process Server identifies the first object as the one you are searching for.</td>
</tr>
<tr>
<td><code>user.object.class</code></td>
<td>Specifies the class name of the user object.</td>
</tr>
<tr>
<td><code>user.last.name.attr</code></td>
<td>Specifies the attribute name of the user's last name.</td>
</tr>
<tr>
<td><code>user.first.name.attr</code></td>
<td>Specifies the attribute name of the user's first name.</td>
</tr>
<tr>
<td><code>user.email.attr</code></td>
<td>Specifies the attribute name of the user's e-mail address.</td>
</tr>
<tr>
<td><code>user.phone.number.attr</code></td>
<td>Specifies the attribute name of the user's phone number.</td>
</tr>
<tr>
<td><code>group.name.attr</code></td>
<td>Specifies the attribute name considered the group name in Business Process Server. Assume this attribute is unique among group objects in LDAP. Business Process Server identifies the first object as the one you are searching for.</td>
</tr>
<tr>
<td><code>group.object.class</code></td>
<td>Specifies the class name of the group object.</td>
</tr>
<tr>
<td><code>group.member.attr</code></td>
<td>Specifies the membership's attribute name.</td>
</tr>
<tr>
<td><code>group.desc.attr</code></td>
<td>Specifies the attribute name of the group description.</td>
</tr>
</tbody>
</table>

If the `ldap.read.user.attribute` parameter is set to `True` in the `umacl.conf` file, then for the attributes `first name`, `last name`, `phone`, and `email`, their LDAP values take precedence over the corresponding database values.
Using the LDAP hybrid realm

In LDAP hybrid realm users are stored and authenticated using the LDAP realm whereas groups are created and stored in the database. Therefore, you cannot perform user management operations on the LDAP users. However, you can perform the group management operations on all groups. In an LDAP hybrid realm, a group can consist of an LDAP user, a database group or a combination of these two. If you must configure the LDAP realm of your LDAP hybrid realm, then refer to the LDAP realm configuration on page 151.

Note: If you choose the LDAP hybrid Realm, then the option of adding and removing users does not appear in the interface.

Modifying the realm type

To modify the realm type.

1. Modify the following parameters in the umacl.conf file.
   a) To change to JDBC realm type.

   Table 38: JDBC realm

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Change value to</th>
</tr>
</thead>
<tbody>
<tr>
<td>set usermgr.realm.type</td>
<td>jdbc</td>
</tr>
</tbody>
</table>

   b) To change to LDAP MSActive

   Table 39: LDAP MSActive

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Change value to</th>
</tr>
</thead>
<tbody>
<tr>
<td>set usermgr.realm.type</td>
<td>ldap</td>
</tr>
<tr>
<td>set ldap.server.provider</td>
<td>MSActive</td>
</tr>
<tr>
<td>set ldap.server.location</td>
<td>Provide the ldap server location</td>
</tr>
<tr>
<td>set ldap.user.name</td>
<td>Provide the ldap server user name</td>
</tr>
<tr>
<td>set ldap.user.password</td>
<td>Provide the ldap server password</td>
</tr>
<tr>
<td>set ldap.user.search.root</td>
<td>cn=Users,dc=qatest,dc=tdiinc,dc=com. Here cn stands for common name and dc stands for domain content</td>
</tr>
<tr>
<td>set ldap.group.search.root</td>
<td>cn=Users,dc=qatest,dc=tdiinc,dc=com</td>
</tr>
</tbody>
</table>

   c) To change to LDAP SunJAVA
2. Invoke the User Config Tool and select the Business Manager Admin credentials.
3. Enter the username and password.
4. Stop all the OEBPS servers.
5. Execute **Setup OEBPS**.
6. Restart all the OEBPS servers.

**Using setupOEBPS to clean or set up component data**

BPM Events, Business Process Server, and User Management maintain data repositories in different locations depending on the configuration setup. One component failure can cause application data inconsistency. You can use the `setupOEBPS` utility to clean up Business Process Server application data and reset Business Process Server.

**Note:** When you perform setup User Management using `setupOEBPS -c UserManager`, it automatically resets Access Control Management component data also.

**Managing user accounts**

Business Process Server enables you to manage user accounts by displaying user information, adding new users, removing users, updating existing user information, and adjusting Business Process Portal Configuration display for each user.

You manage users in the Administration module of Business Process Portal by using the **User List** page as illustrated in Displaying user information on page 155. Depending on the user realm you selected during installation, you can:

- Display information about a user (all realms).
- Search for a user or set of users (all realms).
- Create and remove users (only in JDBC realm).
- Update user information (with limitations in LDAP realm).
- Add/remove permissions for a user, including administration and manager privileges (all realms).
- Configure Business Process Portal links associated with a user (all realms).

**Displaying user information**

To view the **User List** page, in the Administration module, click **User Management > Users**. To view the list of all users, click **All** in the Quick Search.

This page lists all current users, as shown in the following figure.
The **User List** page displays information about the users. By default, it does not display any user. You have to search for the user(s) using the Search Bar. For more details about this, see Searching Users on page 40. It lists the users satisfying your search criteria and the following information about each user:

**Table 43: User list information**

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Name</td>
<td>The user name of the user.</td>
</tr>
<tr>
<td>First Name</td>
<td>The first name of the user.</td>
</tr>
<tr>
<td>Last Name</td>
<td>The last name of the user.</td>
</tr>
<tr>
<td>Email</td>
<td>The email address of the user.</td>
</tr>
<tr>
<td>Phone</td>
<td>The phone number of the user.</td>
</tr>
<tr>
<td>Group Memberships</td>
<td>Click the View link to view the groups of which the current user is a member.</td>
</tr>
<tr>
<td>Queue Memberships</td>
<td>Click the View link to view the queues of which the current user is a member.</td>
</tr>
</tbody>
</table>

To manage the contents of the list, you can sort them. To navigate through the pages, you can use the paging controls. For more details about these operations, see Exploring Business Process Portal on page 28.

From the **User List** page, you can:

- Creating users.
• View/modify user details.
• View group membership details.
• View queue membership details.
• Delete a user.

These operations are explained further in this chapter in the following sections.

Creating users

To create a Business Process Server user, complete the following steps:

Note: You cannot create a user in LDAP, LDAP hybrid. When you use the OEHybrid realm, then the option of adding and removing users does not appear on the Users page in the Business Process Portal. You can add or remove users using an ABL procedure (.p) file to the _Users table of an OpenEdge database. For more information on adding or removing users using an ABL procedure (.p) file, see the OpenEdge Single Point of Authentication (SPAInstructions.pdf) document in your OpenEdge installation directory at $DLC\src\samples\security.

1. On the Home tab, from the User Management drop down list, select Users.
2. Click Create User.

   The Create User page is displayed enabling you to enter the new user information.

3. In the User Details section, enter the relevant data as necessary.

   For more information about the fields, refer to the “Chapter 11, Managing Profile and Favorites” in the Business Process Portal User's Guide.

Important: The fields marked with a red asterisk are required fields.

Note: The user name must contain only alphanumeric characters and underscore (_), and it must start with an alphabet.

a) If you do not assign any business calendar to the user, then the default calendar is used for the due date calculations. Such a user can assign a business calendar to him/herself from the Home module when he/she clicks Preferences > Calendar for the first time.
b) From the Assigned column in the Dashboard table, select the dashboards to be assigned to the user. This list contains the published dashboards. The assigned dashboards appears in the Dashboard List of this user.
c) From the Default Selection column in the Dashboard table, select the dashboard to be assigned to the current user as the default dashboard.

   Alternatively, you can also assign a dashboard to a user from the Dashboard Details page. For more information, see Defining a new dashboard on page 121.

   If you do not assign any dashboard to the user, then the default dashboard specified by the Business Process Server administrator is used.

   If you set the multiuser.credetial parameter to “true” and the appuser.credential parameter to “false” in the sdms.properties file, then you must specify the DMS username and its password.

4. At this time, you can also assign permissions or configure portal resources for the new user.
For more information, see Managing user permissions on page 161.

5. To customise the access to various sub-tabs in the Home, Management and Administration tabs, click the Business Process Portal Configuration tab and select or clear the appropriate checkboxes.

6. Click Save to create the new Business Process Server user and go back to the previous page.

   Click Save & Create New to save the current user and reload the current page to continue adding another user.

   To reset the form and remove the information you just entered, click Reset. To cancel the action and exit the current page, click Cancel.

Deleting users

You can delete a particular user that you no longer need.

To do so, follow these steps:

**Note:** You cannot remove a user in LDAP and LDAP hybrid realm.

1. In the User List page, select the user that you want to delete.

   For more details about this operation, see Selecting and clearing rows on page 35. If needed, first search the users.

2. Click Delete.

   Business Process Portal deletes the selected user and it is removed from the list.

**Note:** You can simultaneously delete multiple users. To do this, in the User List page, select multiple users and then click Delete. Business Process Portal deletes all the selected users.

Updating user information

To update Business Process Server user information, complete the following steps:

1. In the User List page, click the user name link in the User Name column, whose details you want to update.

   The User Details page is displayed.

   An example of this page is shown in the following figure.
2. In the **Admin Password** text box, enter the Business Process Server administrator’s password. You must enter this password again, if you want to change the user’s password.

3. In the **User Details** section, enter/modify the relevant data as necessary.
   
   If the user has made any change(s) in the assigned business calendar, then the name of the default calendar is displayed as “Custom Calendar”. If you change this default calendar, then the new calendar is assigned as the default calendar and the changes made by the user are lost.

   **Note:** The user name must contain only alphanumeric characters and underscore (_), and it must start with an alphabetic character.

   You cannot change the password for LDAP and LDAP hybrid realm.

   In LDAP and LDAP hybrid realms, you may notice that some information fields are inactive and therefore you cannot edit or update fields that include: "Last Name", "First Name", "Email", and "Phone".

   If you set the `multiuser.credetial` parameter to "true" and the `appuser.credetial` parameter to "false" in the `sdms.properties` file, then you must specify the DMS username and its password.

4. Click **Save** to save the changes and go back to the previous page.
   
   Click **Delete** to delete the current user.
   
   To reset the form and remove the information you just entered, click **Reset**. To cancel the action and exit the current page, click **Cancel**.

---

**Viewing group memberships**

To view the list of groups of which a user is a member, complete the following steps:
1. In the **User List** page, click the **View** link in the Group Memberships column, whose membership details you want to view.

   The **Membership Details** window is displayed.

   An example of this window is shown in the following figure.

   **Figure 57: Group membership details window**

<table>
<thead>
<tr>
<th>Membership Details table</th>
</tr>
</thead>
<tbody>
<tr>
<td>No.</td>
</tr>
<tr>
<td>-----</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
</tbody>
</table>

   The Membership Details table displays the group name and group description of groups of which the current user is a member.

2. Click **Close** to close the window and go back to the previous page.

### Viewing queue memberships

To view the list of queues of which a user is a member, complete the following steps:

1. In the **User List** page, click the **View** link in the Queue Memberships column, whose membership details you want to view.

   The **Membership Details** window is displayed.

   An example of this window is shown in the following figure.
The Membership Details table displays the queue name and queue description of queues of which the current user is a member.

2. Click **Close** to close the window and go back to the previous page.

## Managing user permissions

As an administrator, you can grant or revoke permissions to specific Business Process Server components and resources and/or module menus in Business Process Portal.

**To manage permissions for a user:**

1. On the **Home** tab, from the **User Management** drop down list, select **Users**.
2. Click the user name link in the **User Name** column, whose permissions you want to update.
   The **User Details** page is displayed.
3. Click **Permissions** to go to the Permissions section.
4. Select or clear the checkbox to grant or revoke permission to resources that include Business Process Server, BPM Events, Management or Administration.
5. Click **Business Process Portal Configuration** to go to the Business Process Portal Configuration section.
6. Select or clear the checkbox to grant or revoke permission to access the module menus.
7. Click **Save** to save the changes and go back to the previous page.

   Click **Delete** to delete the current user.

   To reset the form and remove the information you just entered, click **Reset**. To cancel the action and exit the current page, click **Cancel**.

---

**Figure 58: Queue membership details window**

<table>
<thead>
<tr>
<th>No.</th>
<th>Queue Name</th>
<th>Queue Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Queue1</td>
<td>Queue One</td>
</tr>
</tbody>
</table>

---
Refreshing user cache

In OEBPS user cache techniques are introduced to cache the user details. LDAP is an existing system, when there is any changes done to LDAP system, for example, user's first name, then OEBPS is unaware of the changes. To reflect the LDAP changes in OEBPS portal immediately, OEBPS cache needs to be refreshed using BPServerAdmin command `removeuserfromcache <username>`

1. To notify the OEBPS about the LDAP changes for the user, OEBPS cache should be refreshed by following the steps below:
   a) Open the BPServerAdmin console using the command `startBPServerAdmin.cmd` from `OEBPS_Home>\bin`.
   b) To refresh the user cache, execute the command `removeuserfromcache <username>` for which the changes has been done.

2. Navigate to Administration > User Management > Users page. The changes on LDAP will be reflected.
3. Refresh the page. The changes on LDAP is reflected.

Password policy

You can add Password Security Policy feature in the portal for each user. You can set the following password policies:

- Change on first login
- Duration

For more details about these password policies, and about implementing a custom password policy, refer to the OpenEdge Getting Started: Installation and Configuration Guide.

Delegating tasks to users

As a Business Process Server administrator, you can delegate tasks usually performed by one user to another user, in the event that the usual user cannot perform his/her tasks for a specified time period. Currently, you cannot delegate at the task level, but only at an application level; that is, a user is assigned all the tasks of a selected application.

To delegate tasks to a user:

1. In the Administration module, click User Management > Delegate Settings, to view the Delegate Settings page.
   To view the list of all users, click All in the Quick Search.
   An example of this page is shown in the following figure.
2. Select a user for whom you want to set delegates by clicking the option in the first column of that user. For more details, see Selecting and clearing rows on page 35.

3. Click Choose. The Delegate Settings Details page is displayed, where you can assign one or more delegates to perform tasks in selected application(s) for the specified user.

The user you have submitted is shown in the Delegation for (submitted user name) title.

4. In the Delegate Settings page, you can specify the user to whom all your tasks are delegated by entering its user name in the Delegate all tasks to text box. Alternatively, you can click the Search User icon ( ) and opening the Search Users page where you can choose a user.

Alternatively, for each application, you can specify the user name(s) to whom that application should be delegated. If needed, you can search and add users for delegating all tasks or delegating application-wise tasks. For more details, see Searching Users on page 40.
5. Select the check box in the **Disable Delegation** column to disable delegation of a particular task. Select the check box in the Disable Delegation column header to disable delegation of all the tasks.

6. Specify the period of delegation and its start and end dates using the **Start Date** and **End Date** text boxes.

   Alternatively, click the **Select Date** icon (mouseover) to set the respective start date or end date. For more details, see **Specifying a Date** on page 39.

7. Click **Save** to save your settings.

   To cancel the action and exit the current page, click **Cancel**.
Managing groups

The chapter explains how to use the Administration module of Business Process Portal to manage Business Process Server groups, along with the features of each realm and its respective interface. It also explains how to manage the favorite links.

Business Process Server enables you to manage group accounts by displaying group and user information, adding or removing users as members, updating existing group information, and adjusting Business Process Portal Configuration display for a group. You can also refresh the user cache settings. For more information refer to, Refreshing user cache on page 162. For details, see the following topics:

- Managing group accounts
- Managing favorites

Managing group accounts

Business Process Server enables you to manage groups in the Administration module of Business Process Portal by using the Group List page. From this page, you can:

- Display information about an existing group (all realms).
- Search for a user or a group (all realms).
- Create and remove groups (only in JDBCRealm).
- Add and remove members from groups (only in JDBCRealm).
Displaying group information

To view the Group List page, in the Administration module, click User Management > Groups. To view the list of all groups, click All in the Quick Search.

This page lists all current groups, as shown in the following figure.

Figure 61: Displaying group information in the group list page (JDBC realm)

Group list page

By default, the Group List page does not display any group. You must search for the group(s) using the Search Bar or by clicking All in the Quick Search Bar. For more details on searching for groups, see Searching Users on page 40. Groups satisfying the search criteria are displayed, and the following information about each group is displayed:

Table 44: My application list information

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Name</td>
<td>The name of the group.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the group.</td>
</tr>
<tr>
<td>Member</td>
<td>Click the icon to view the members of the group.</td>
</tr>
<tr>
<td>Memberships</td>
<td>Click the View link to view the groups of which the current group is a member.</td>
</tr>
</tbody>
</table>

To manage the contents of the list, you can sort them. To navigate through the pages, you can use the paging controls. For more details about these operations, see Exploring Business Process Portal on page 28.

From the Group List page, you can perform the following operations:
Creating groups

To create a new Business Process Server group, complete the following steps:

1. In the Group List page, click Create Group.
   The Create Group page is displayed enabling you to enter the new group information.

2. In the Group Details section, enter the relevant data as necessary.
   For more information about the Organization and Tenancy fields, refer to the "Chapter 12, Managing Profile and Favorites" in the Business Process Portal User's Guide. Note that Group Name and Default Calendar are the required fields.

   a) From the Assigned column in the Dashboard table, select the dashboards to be assigned to the group. This list contains the published dashboards.
   The assigned dashboards will appear in the Dashboard List of this group.

   b) From the Default Selection column in the Dashboard table, select the dashboard to be assigned to the current group as the default dashboard.
   Alternatively, you can also assign a dashboard to a group from the Dashboard Details page. For more information, see Defining a new dashboard on page 121.
   If you do not assign any dashboard to the group, then the default dashboard specified by the Business Process Server administrator is used.

3. At this time, you can also assign permissions and configure portal resources for the group.
   For more information, see Managing group permissions on page 169.

4. Click the Business Process Portal Server tab and select or clear the checkboxes to grant or revoke permission to access the module menus.

5. Click Save to create the new Business Process Server group and go back to the previous page.
   Click Save & Create New to save the current group and reload the current page to continue adding another group.
   To reset the form and remove the information you just entered, click Reset. To cancel the action and exit the current page, click Cancel.
Deleting groups

If you no longer need a particular group, then you can delete it.

To do so, follow these steps:

Note: You cannot remove a group in an LDAPRealm.

1. In the Group List page, select the group that you want to delete.
   
   For more details about this operation, see Selecting and clearing rows on page 35. If needed, first search the groups. For more details about this operation, see Searching Users on page 40.

2. Click Delete.
   
   Business Process Portal deletes the selected group and it is removed from the list.

   Note: You can simultaneously delete multiple groups. To do this, in the Group List page, select multiple groups and then click Delete. Business Process Portal deletes all the selected groups.

Updating group information

To update Business Process Server group information, complete the following steps:

1. In the Group List page, click the group name hyper link in the Group Name column, whose details you want to update.
   
   The Group Details page is displayed.
   
   An example of this page is shown in the following figure.
2. In the Group Details section, enter/modify the relevant data as necessary.

**Note:** The group name must contain only alphanumeric characters and underscore (_), and it must start with an alphabet.

3. Click **Save** to save the changes and go back to the previous page.

   Click **Delete** to delete the current group.

   To reset the form and remove the information you just entered, click **Reset**. To cancel the action and exit the current page, click **Cancel**.

---

**Managing group permissions**

As an administrator, you can grant or revoke group permissions for specific Business Process Server components and resources and/or module menus in Business Process Portal.

**To manage permissions for a group:**

1. In the **Group List** page, click the group name hyper link in the **Group Name** column, whose permissions you want to update. The **Group Details** page is displayed.

2. Click **Permissions** to go to the Permissions section.

3. Select a **Component** for which you want to update permissions from the list. Select **All** to apply these permissions to all components.

4. Select or clear the check box to grant or revoke permission to resources that include BP Server, BPM Events, Administration or Management. Select the checkbox in the heading to apply all the listed permissions to the group.

5. Click **Business Process Portal Configuration** to go to the Business Process Portal Configuration section.

6. Select or clear the checkbox to grant or revoke permission to access the module menus.

7. Click **Save** to save the changes and go back to the previous page.

   Click **Delete** to delete the current group.
Managing members in groups

Business Process Server enables you to manage members in groups by allowing you to search for users for a group, add and remove one or more members from groups (only in JDBCRealm), and to change user roles within the group. In this way, you gain more flexibility for filtering users assigned as a performer in an activity workstep.

A group can contain one or more groups as members. A user or a group can be a member of more than one group.

Viewing Group members

To view the Group Members List page, click the View Group Members icon in the Group List page. This page displays the members of the selected group.

The example of this page is shown in the following figure.

Figure 63: Group members list page

Group Members List page

The Group Members List page contains two frames: the top frame displays users that are members of the selected group; and the bottom frame displays groups that are members of the selected group.

To manage the contents of the list, you can sort them. To navigate through the pages, you can use the paging controls. For more details about these operations, see Exploring Business Process Portal on page 28.

From the Group Members List page, you can:

- Adding a group member.
• Changing the role of a member.
• Deleting a group member.

These operations are explained in the following sections.

Adding members to groups

To add Business Process Server users or groups as members of a group, complete the following steps:

Note: You cannot add a member to a group in an LDAPRealm.

1. In the Group Members List page, click Add Group Member.

   The Add Users & Groups page is displayed.

   An example of this page is shown in the following figure.

   **Figure 64: Add users and groups page**

2. Search and locate users or groups. For more details, see Searching Users on page 40.

3. Click Add to add the selected users and/or group and go back to the previous page.

   Click Add & Continue to add the current users/groups and reload the current page to continue adding another user/group.

   To cancel the action and exit the current page, click Cancel.

Changing the role of a member

To change the current role of the user who is a member of a group, complete the following steps:

1. In the Group Members List page, click the Edit Role icon ( ). The Edit Role window is displayed.

   An example of this page is shown in the following figure.
Figure 65: Edit role window

<table>
<thead>
<tr>
<th>Edit Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Role:</td>
</tr>
<tr>
<td>Select a Role:</td>
</tr>
<tr>
<td>Save</td>
</tr>
</tbody>
</table>

2. Specify the name of the new role in the box. Alternatively, click the option beside the drop-down list, and select a role from the list.

3. Click **Save** to save the settings and close the window.

To reset the form and remove the information you just entered, click **Reset**. To cancel the action and exit the window, click **Cancel**.

**Note:** To remove the role of a member, click the "New Role" option and enter a space, and then click **Save**.

Removing members from groups

**To remove a member from a group, complete the following steps:**

**Note:** You cannot remove a member from a group in an LDAPRealm.

1. In the **Group Members List** page, select the user and/or group that you want to delete. For more details about this operation, see Selecting and clearing rows on page 35.
2. Click **Delete**.

Business Process Portal deletes the selected user/group and it is removed from the list.

**Note:** You can simultaneously delete multiple users or groups. To do this, in the **Group Member List** page, select multiple users or groups, and then click **Delete**. Business Process Portal deletes all the selected users/groups.

Managing favorites

Business Process Server enables you to manage frequently accessed Web applications, Business Process Server applications, internet and/or intra-net sites' links in the Administration module of Business Process Portal by using the **Favorites List** page.

From this page, you can:

- Display list of existing favorites links.
- Add and remove links.
- Update links.
Displaying list of favorites

To view the Favorites List page, in the Administration module, click User Management > Favorites.

This page lists all current favorite links, as shown in the following figure.

Figure 66: Displaying the favorites list page

By default, it displays the following information about each favorites link:

Table 45: Favorites list information

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the link.</td>
</tr>
<tr>
<td>Group</td>
<td>The list of groups that can access this link.</td>
</tr>
<tr>
<td>URL</td>
<td>The URL of the link.</td>
</tr>
<tr>
<td>Language</td>
<td>The language used for the content of the link.</td>
</tr>
</tbody>
</table>

To manage the contents of the list, you can sort them using the name. To sort the list, click the drop-down list beside the Name column header, and select Ascending or Descending.

To navigate through the pages, you can use the paging controls shown below the table.

From the Favorites List page, you can:

- Add Favorite links.
- View/modify link details.
- Delete a link.

Note: The user has to re-login to reflect the changes because of addition, modification and deletion in the favorite links.
These operations are explained further in this chapter in the following sections.

Adding favorite links

To add a new favorite link, complete the following steps:

1. In the Favorite List page, click Add Favorites.

   The Add Favorites page is displayed enabling you to enter the favorite link's information.

   An example of this page is shown in the following figure.

   Figure 67: Add favorites page

   ![Add Favorites Page Screenshot]

   2. Enter a name for the favorite link in the Name text box.

   3. Specify the group(s) in the Assign Group(s) text box. This link is shown as a Favorite menu's option in the Home module for the members of the specified group(s).

   4. Select the language from the Language drop-down list.

      Note: Favorites created in a specific language is assigned only to a user configured with that language.

   5. Enter the Display Name, URL and Description in the respective text boxes. The Display Name is shown as the Favorite menu's option in the Home module. Note that Name, Assign Group(s), Language, Display Name, and URL are the required fields.

   6. Click Save to add the new Favorite link and go back to the previous page.

      To reset the form and remove the information you just entered, click Reset. To cancel the action and exit the current page, click Cancel.

Deleting favorites

If you no longer need a particular favorite link, then you can delete it.

To do so, follow these steps:
1. In the **Favorite List** page, select the favorite link that you want to delete by clicking its radio button in the first column.

2. Click **Delete**. Business Process Portal deletes the selected favorite link and it is removed from the list.

## Updating favorites information

**To update favorite link’s information, complete the following steps:**

1. In the **Favorite List** page, select the favorite link that you want to modify by clicking its radio button in the first column.

2. Click **Edit**.

   The **Modify Favorites** page is displayed.

   An example of this page is shown in the following figure.

   **Figure 68: Modify favorites page**

3. Enter/modify the relevant data as necessary.

   **Note:** You cannot modify the Name and Language.

4. Click **Save** to save the changes and go back to the previous page.

   To reset the form and remove the information you just entered, click **Reset**. To cancel the action and exit the current page, click **Cancel**.
Managing work item queues

The chapter explains how to configure the work item queues using the Administration module of Business Process Portal.

For details, see the following topics:

- Understanding work item queue management
- Managing work item queues

Understanding work item queue management

In Business Process Server, workitems can be generated when a process instance is created, and these workitems are assigned to a valid human performer or valid user group as tasks. A work item queue is a dynamic data structure to which users and groups are added, allowing them to subscribe to workitems assigned to the queue. Work item queues are dynamic in the sense that, you can add, remove or update users and groups to a queue during run time.

**Note:** To enable work item management using queues, the Business Process Server property `oebps.queues` should be set to TRUE in `oebps.conf` file. For more information, see BP Server property files on page 72.

**Important:** If a task is assigned to any member of queue containing nested groups, then only the members of highest level group find the task in Available state.
Managing work item queues

Business Process Server enables you to manage work item queues by displaying work item queue information, adding new work item queues, removing work item queues, updating existing work item queue information, and adding/updating/removing the work item queue members for each user.

Displaying work item queues

To view the Queue List page, in the Administration module, click User Management > Queues. To view the list of all queues, click All in the Quick Search.

This page lists all current queues, as shown in the following figure.

**Figure 69: Queue list page**

![Queue list page](image)

Queue List page

The Queue List page displays information about the work item queues. By default, it does not display any work item queue. You will have to search for the queue(s) using the Search Bar. Searching for queues is similar to searching for users. For more details about this, see Searching Users on page 40. It lists the queues satisfying your search criteria and the following information about each queue:

**Table 46: My application list information**

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Queue Name</td>
<td>The name of the work item queue.</td>
</tr>
</tbody>
</table>
Managing work item queues

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>The description of the work item queue.</td>
</tr>
<tr>
<td>Member</td>
<td>The user(s) and group(s) that are members of the work item queue.</td>
</tr>
</tbody>
</table>

To navigate through the pages, you can use the paging controls. For more details about these operations, see Exploring Business Process Portal on page 28.

From the Queue List page, you can perform the following operations:

- Creating work item queues.
- View/modify work item queue details.
- View/modify work item queue members.
- Delete a work item queue.

These operations are explained further in this chapter in the following sections.

Creating work item queues

To create a work item queue, complete the following steps:

1. In the Queue List page, click Create Queue.

   The Create Queue page is displayed enabling you to enter the new work item queue information.
   An example of this page is shown in the following figure.

   ![](Figure 70: Create queue page)

2. In the Queue Details page, enter the relevant data as necessary.
The fields marked with a red asterix are required fields.

3. Click **Save** to create the new work item queue and go back to the previous page. Click **Save & Create New** to save the current work item queue and reload the current page to continue adding another work item queue.

To reset the form and remove the information you just entered, click **Reset**. To cancel the action and exit the current page, click **Cancel**.

### Updating work item queue information

**To update work item queue information, complete the following steps:**

1. In the **Queue List** page, click the work item queue name link in the **Queue Name** column, whose details you want to update.

   The **Queue Details** page is displayed.

   An example of this page is shown in the following figure.

   ![Queue details page](image)

   **Figure 71: Queue details page**

2. In the **Queue Details** page, enter/modify the relevant data as necessary.

3. Click **Save** to save the changes and go back to the previous page.

   Click **Delete** to delete the current work item queue.

   To reset the form and remove the information you just entered, click **Reset**. To cancel the action and exit the current page, click **Cancel**.

### Deleting work item queues

**If you no longer need a particular work item queue, then you can delete it.**

**To do so, follow these steps:**

1. In the **Queue List** page, select the work item queue that you want to delete.
For more details about this operation, see Selecting and clearing rows on page 35. If needed, first search the queues. Searching for queues is similar to searching for users. For more details about this, see Searching Users on page 40. It lists the queues satisfying your search criteria.

2. Click **Delete**.

**Note:**

- A queue having workitems available to queue members cannot be deleted.
- A queue cannot be deleted even if the workitem available to the queue members is reassigned to another user. This is because the queue is the actual owner of the workstep instance. Only when the workstep instance is completed, then you can delete the queue.

Business Process Server deletes the selected work item queue and it is removed from the list.

**Note:** You can simultaneously delete multiple queues. To do this, in the **Queue List** page, select multiple queues and then click **Delete**. Business Process Server deletes all the selected users.

### Managing work item queue members

Business Process Server enables you to manage members of a work item queue by allowing you to search for users and/or groups, add and remove one or more members, and to change user/group availability.

One or more users and/or groups can become a member of a work item queue.

### Viewing Queue Members

To view the **Queue Members List** page, click the **View Queue Members** icon in the **Queue List** page. Alternatively, you can click the **Queue Members** link from the **Queue Details** page of the selected work item queue. This page displays the members of the selected work item queue.

The example of this page is shown in the following figure.
The Queue Members List page contains two frames: the top frame displays users that are members of the selected work item queue; and the bottom frame displays groups that are members of the selected work item queue.

To manage the contents of the list, you can sort them. To navigate through the pages, you can use the paging controls. For more details about these operations, see Exploring Business Process Portal on page 28.

From the Queue Members List page, you can:

- Adding a member.
- Deleting a member.

These operations are explained further in this chapter in the following sections.

Adding members to work item queues

To add Business Process Server users or groups as members of a work item queue, complete the following steps:

1. In the Queue Members List page, click Add Queue Member.

   The Add Users & Groups page is displayed.

   An example of this page is shown in the following figure.
### Figure 73: Add users and groups page

<table>
<thead>
<tr>
<th>User List</th>
<th>Group List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick Search: <strong>All</strong></td>
<td>Quick Search: <strong>All</strong></td>
</tr>
<tr>
<td>No.</td>
<td>User Name</td>
</tr>
<tr>
<td>No.</td>
<td>Group Name</td>
</tr>
</tbody>
</table>

2. Search and locate users or groups. For more details, see [Searching Users](#) on page 40.
3. Click **Add** to add the selected users and/or group and go back to the previous page.
   - Click **Add & Continue** to add the current users/groups and reload the current page to continue adding another user/group.
   - To cancel the action and exit the current page, click **Cancel**.

### Removing members from workitem queue

**To remove a member from a work item queue, complete the following steps:**

1. In the **Queue Members List** page, select the user and/or group that you want to delete.
   - For more details about this operation, see [Selecting and clearing rows](#) on page 35.
2. Click **Delete**.

Business Process Server deletes the selected user/group and it is removed from the list.

**Note:** You can simultaneously delete multiple users or groups. To do this, in the **Queue Members List** page, select multiple users or groups, and then click **Delete**. Business Process Server deletes all the selected users/groups.

Do not remove all members of a queue if workitems are still assigned to that queue.
The introduction of Access Control Management (ACLManager) enables you as administrator to personalize Business Process Portals, with authorization to specified portals and features limited to the appropriate user. The Access Control Management feature also allows administrators to:

- Add and/or remove privileges, thereby limiting a user's access to some features of a portal. For example, you may give a person access to the user management features of the Administration module, but not the ability to restart the servers or install applications.

- Develop a custom portal that collects features from the various "out-of-the-box" Business Process Portals. For example, allowing a user to install or uninstall certain applications.

ACLManager is used by the portals and the server API to limit access to Business Process Server resources. This chapter explains how to apply the ACLManager permissions to users and groups, and their resources.

For details, see the following topics:

- Butterfly model of security
- Accessing access control parameters
- Working with permissions
Butterfly model of security

The ACLManager in Business Process Server follows the butterfly modeling concept for security. This model gives you more flexibility and better control. In the butterfly model, users, resources and actions are the basic entities, and the relations between these entities are controlled by granting/revoking rights. In this model, users are the subjects of accesses, resources are the objects of accesses, and actions are the operations performed by the users on the resources. In Business Process Server, the users can be Business Process Portal users and/or groups, resources can be any of the Business Process Server components and/or resources, and actions are the list of possible operations you can perform on these resources. For more details about the Business Process Server resources and actions see, Business Process Server resource hierarchy on page 186.

Accessing access control parameters

Business Process Server stores the configuration parameters for Access Control Management in the umacl.conf file, located in the OEBPS_HOME\conf directory. The parameter that specifies the implementation is as follows:

```
system.aclmgr.class=com.savvion.acl.impl
```

If you want to use your own user management implementation instead of the Business Process Server's default implementation -- com.savvion.acl.impl, then you can specify your user implementation class name as the value of this parameter.

Business Process Server resource hierarchy

The authorization process in Business Process Server is performed by the ACLManager. Actions are placed on the resource. The list of resource/action pairs associated with the user/group represent that user/group's privilege. Actions define the type of task you can perform on the resource.

To better understand the application of permissions, Business Process Server resource hierarchies are grouped into five categories: Business Process Server, BPM Events, Management, Administration, and Dashboard. How these resources operate is explained as follows:

**Business Process Server**

Business Process Server resources belong to one of three hierarchies:

- Process instance resources. This hierarchy gives a user the right to perform operations on a process instance, i.e. BPServer.PI.Approval.App#1, while another user has the right to perform operations on BPSever.PI.Approval.App#2. Remember, a user with the right to perform operations on BPServer.PI.Approval as a resource inherits the right for all instances of Approval. Likewise, a user with the right to perform an operation on BPServer.PI, may perform that operation on all Business Process Server process template instances.

**Tip:** To use the process instance permissions, you must set the system.pi.checkacl parameter from the umacl.conf file to TRUE.
Dataslot resource. Consider the protection for the "salary" and "resume" dataslots of the Hiring#1 process instance. The resource names are BPServer.DS.Hiring.Hiring#1.salary and BPServer.DS.Hiring.Hiring#1.resume. A user with the rights to resource BPServer.DS.Hiring.Hiring#1 has the rights on all Hiring#1 dataslots, which includes "salary" and "resume."

Process template resource. The shallowest of the Business Process Server hierarchies, this permission allows defining process templates as resources. Any template, such as Approval, Hiring, or Timeoff can be protected as a resource in Business Process Server. You may reference these templates as BPServer.PT.Approval, BPServer.PT.Hiring, or BPServer.PT.Timeoff.

The resources protected in Business Process Server are summarized below:

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Template</td>
<td>PTName</td>
</tr>
</tbody>
</table>
**BPM Events**
The resources protected in BPM Events are as follows:

Table 48: BPM Events resources

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infopad</td>
<td>infopadname</td>
</tr>
</tbody>
</table>

**Management**
The resources protected in the Management module of Business Process Portal are as follows:

Table 49: Management resources

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report</td>
<td>PTName.reportName</td>
</tr>
<tr>
<td>BPMSQLReport</td>
<td>fileName</td>
</tr>
<tr>
<td>ReportBuilder</td>
<td>reportType</td>
</tr>
<tr>
<td></td>
<td>OEBPS. Internally created reports in the Management module.</td>
</tr>
<tr>
<td></td>
<td>External. Reports from external reports sources, crystal, BPM SQL, etc.</td>
</tr>
</tbody>
</table>

**Administration**
The protected resources for Administration module users are:

Table 50: Administration resources

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application</td>
<td>appName</td>
</tr>
<tr>
<td>Modeler</td>
<td>modelername</td>
</tr>
<tr>
<td>Configuration</td>
<td>confilename</td>
</tr>
<tr>
<td>Queue</td>
<td>queueName</td>
</tr>
<tr>
<td>Reusable Components</td>
<td>reusablecomponentName</td>
</tr>
<tr>
<td>Type</td>
<td>Name</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Log</td>
<td>componentName</td>
</tr>
<tr>
<td>Server</td>
<td>servername</td>
</tr>
<tr>
<td>Group</td>
<td>groupname</td>
</tr>
<tr>
<td>User</td>
<td>username</td>
</tr>
<tr>
<td>Permission</td>
<td>permission⁴</td>
</tr>
</tbody>
</table>

The application resource types are:
- BPM Webflow
- OEBPS

The configuration resource file names are:
- BPMPortal
- BPMEvents
- BPMWebflow
- BPMProcessStore
- Email
- EventPublisher
- Log
- Portal
- OEBPS

The reusable components resource types are:
- BPMWebflow
- OEBPS

The log resource component names are:
- Archiver
- BPMPortal
- BPMEvents
- BPMWebflow
- BPMProcessStore
- EventPublisher
- OEBPS

The server resources are:
- Archiver

⁴ This is a general, not a specific permission for this resource. You may name this permission anything but "mypermission."
Dashboard

The resources protected in Dashboard are as follows:

Table 51: Dashboard resources

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard Component</td>
<td>componentname</td>
</tr>
</tbody>
</table>

Actions

Actions are the type of task you can perform on the resource. For example, you may grant a permission to a group to start and stop a server in the Administration module. The resource is the server, stop and start are the actions, and Administration is the component. Unlike resources, actions are not hierarchical. The following table depicts all actions defined for all Business Process Server resources:

Table 52: Actions for resources

<table>
<thead>
<tr>
<th>Component</th>
<th>Resource type</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>BP Server</td>
<td>Process instance</td>
<td>Any, Remove, Suspend, Resume, View, Update</td>
</tr>
<tr>
<td>BP Server</td>
<td>Process template</td>
<td>Any, View, Update</td>
</tr>
<tr>
<td>BP Server</td>
<td>Dataslot</td>
<td>Any, View, Update</td>
</tr>
<tr>
<td>BP Server</td>
<td>Infopad</td>
<td>Any, View, Update</td>
</tr>
<tr>
<td>Management</td>
<td>Report Builder</td>
<td>Execute</td>
</tr>
<tr>
<td>Management</td>
<td>BPMSQL Report</td>
<td>Execute</td>
</tr>
<tr>
<td>Management</td>
<td>Report Builder</td>
<td>Any, Create, Update, Remove</td>
</tr>
<tr>
<td>Administration</td>
<td>Server</td>
<td>Any, Start, Stop, Suspend, Resume, View Status</td>
</tr>
<tr>
<td>Administration</td>
<td>Configuration</td>
<td>Any, View, Update</td>
</tr>
<tr>
<td>Administration</td>
<td>User</td>
<td>Any, View, Create, Remove, Update, Delegate</td>
</tr>
<tr>
<td>Administration</td>
<td>Group</td>
<td>Any, View, Create, Remove, Addmember, Removemember, Change Role, Update</td>
</tr>
</tbody>
</table>
### Business Process Server user and group permissions

Business Process Server users and groups are managed by the OEBPS User Manager. The ACLManager invokes the User Manager API to retrieve information about a particular user or group, and enables you to manage permissions. Apply the ACLManager on users and groups to:

- View all permissions in the Administration module.
- Create new permissions.
- Remove permissions.
- Grant permissions to users and groups.
- Revoke permissions from users and groups.

Each Permission List is organized via component, with each component having its own set of permissions, providing you an authorization mechanism with more security over Business Process Server resources.

You manage permissions in Administration by using the **Permissions List** page. It displays the Access Control information as illustrated in **Listing all permissions** on page 191.

### Listing all permissions

To view the **Permissions List** page, in the Administration module, click User Management > Permissions.

This page lists all permissions, as shown in the following figure.

---

5 You cannot suspend and resume a Web application.

6 The execute action protects a Web application from unauthorized execution. For example, in the Start step of the Web process, if an authenticated user is not authorized to execute the application, then they will receive an authorization failure error.
Figure 77: Listing permissions

Permissions List page

The Permissions List page displays information about the existing set of permissions for various components. By default, it displays all permissions and the following information about each permission:

Table 53: My application list information

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Component</td>
<td>The name of the component for which the permission is applicable.</td>
</tr>
<tr>
<td>Permission Name</td>
<td>The name of the permission.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the permission.</td>
</tr>
<tr>
<td>Resource Type</td>
<td>The type of resource for which the permission is applicable.</td>
</tr>
<tr>
<td>Resource Name</td>
<td>The name of the resource.</td>
</tr>
<tr>
<td>Action</td>
<td>The action performed on the resource; for example, View, Execute.</td>
</tr>
</tbody>
</table>

To manage the contents of the list, you can sort them. You can use the Component drop-down list to list the permissions for a particular component or for all components. To navigate through the pages, you can use the paging controls. For more details about these operations, see Exploring Business Process Portal on page 28.

From the Permissions List page, you can:

- Create a permission.
- Delete one or more permissions.

These operations are explained further in this chapter in the following sections.
Creating permissions

To create a new permission, complete the following steps:

1. In the Permissions List page, click Create Permission.
   
The Create Permissions page is displayed enabling you to enter the new permission information.
   
An example of this page is shown in the following figure.

Figure 78: Creating New Permissions

![Create Permissions Page](image)

2. Specify a name and description for the permission in the **Permission** and **Description** boxes respectively. Permissions and Description are the required fields.
3. Select a component name from the **Component** drop-down list. Also select options from the **Resource Type** and **Action** drop-down lists.

   **Note:** Actions are dependent on the Resource Type. Therefore, select your Resource Type before the Action.

4. Depending on the component you select, you will have to specify additional options by selecting them from the appropriate drop-down lists.
5. Click **Save** to create the new permission and go back to the previous page.

   Click **Save & Add New** to save the current permission and reload the current page to continue adding another permission.

   To reset the form and remove the information you just entered, click **Reset**. To cancel the action and exit the current page, click **Cancel**.

Removing permissions

When a permission is removed, you cannot grant or revoke the permission from a user or group.

To remove an existing permission from a component, complete the following steps:

1. In the Permissions List page, select the permission that you want to delete.
Granting/Revoking permissions to users or groups

In order to gain access to, or be restricted from, protected resources, a user or group must be given or denied permission. To grant or revoke permission to users, see the procedures described in Managing user permissions on page 161 or Managing group permissions on page 169.

**Note:** Once you grant a permission to the user, make sure that the user has access to the relevant portal pages through the Business Process Portal Configuration in the User Details page. See Managing users on page 145 for more information on this procedure. Once you grant a permission to a group, make sure it has access to the relevant portal pages through the Business Process Portal Configuration in the Group Details page. See Managing groups on page 165 for more information on this procedure.

Granting application permission to managers

After creating an application permission, you may grant it to individuals for managing that application. In previous versions, managers were required to have access to the Management module. This is no longer necessary. Now you create and grant the permissions to the user/manager for viewing or updating an application.

This procedure is outlined in the following steps.

1. Navigate to the Permissions List page, and click Create Permission.
2. The Create Permissions page is displayed, where you can create the new permission.
3. Enter the new permission name and its description.
   For example, if you wish to give a manager the ability to update a process template in the Management module, then you may enter "Update Process Template" in the Permission box and "For Managers in the Management module" in the Description box.
4. Select BP Server from the Component drop-down list; Process Template from the Resource Type drop-down list; and Update from the Action drop-down list.

**Important:** Although the user accesses the template in Management, the process template itself is in Business Process Server, which is why you must grant this as a Business Process Server permission, not a Management permission.

5. Click Save. Business Process Server creates the new permission after your confirmation.
   You must next grant this new permission to the user/manager.
6. Click User Management > Users.
7. Click the User Name link of the user/manager to whom you want to assign the new permission, displaying the User Details page.

8. Click Permissions to go to the Permissions section. In this section, Business Process Server displays the permissions available for assignment to the selected user/manager.

9. Select the check box beside the permission name that you just created. Click Save.

Business Process Server grants the selected permission to the selected user/manager after your confirmation.

**Working with permissions**

In Business Process Server a particular permission is a combination of resources and actions for a component. The options for the resources and actions vary depending on the component you select. The permission names used in the following tables represent the options you selected while defining the permission. For example, `bl_pt_any_any` represents Component BP Server, Resource Type ProcessTemplate, Action Any and Process Template Any.

**Business Process Server permissions**

This section explains various Business Process Server permissions and scope.

**Abbreviations**

The abbreviations for the component options used in the Business Process Server permissions are as follows:

- `bl`: BP Server
- `pt`: Process Template
- `pi`: Process Instance
- `ds`: Dataslot

**Scope of a permission**

In the case of resources such as process template or process instance, the options include "Any" and the list of process templates or process instances. If you select Any while creating a permission, then the scope of that permission is across all process templates or process instances; whereas if you select a particular process template or process instance, then the scope of that permission is limited only to the selected process template or process instance. For example, the permission `bl_pt_any_any` allows you to view or update any of the existing process templates, but `bl_pt_any_<specific_pt>` allows you to view or update only the selected process template. The following table lists only the permissions with "Any" option, wherever applicable, you may select a specific entity instead of Any to limit the scope.

**Note:** If ACL needs to be checked when accessing process instance resources, then `system.pi.checkacl` parameter in `umacl.conf` file should be set to true.
Table 54: Business Process Server permissions and their usage

<table>
<thead>
<tr>
<th>Permission</th>
<th>Pre-requisite</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>bl_pi_any_any_any (Default ProcessInstance permission)</td>
<td>Case 1:Permissions: ---Business Process Portal Configuration: ---</td>
<td>Home &gt; My Instances You can only view the workstep details of the process instance created by you, by using PSV chart.</td>
</tr>
<tr>
<td></td>
<td>Case 2:Permissions: Any of the following</td>
<td>Management &gt; Overview &gt; Instances You can modify the process instance’s workstep details by using PSV chart.</td>
</tr>
<tr>
<td></td>
<td>• bl_pt_any_any, or</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• bl_pt_view_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• bl_pt_update_any</td>
<td></td>
</tr>
</tbody>
</table>
### Working with permissions

<table>
<thead>
<tr>
<th>Permission</th>
<th>Pre-requisite</th>
<th>Example</th>
</tr>
</thead>
</table>
| bl_pi_suspend_any_any | Permissions: All of the following  
  • bl_pt_any_any  
  • bl_pi_view_any_any  
  • bl_ds_update_any_any_any  
  Business Process Portal Configuration: Management > Overview | Management > Overview > Instances > Process Status Viewer > View Dataslots You can suspend any process instance by changing its Status from the drop-down list. |
| bl_pi_resume_any_any | Permissions: All of the following  
  • bl_pt_any_any  
  • bl_pi_view_any_any  
  • bl_ds_update_any_any_any  
  Business Process Portal Configuration: Management > Overview | Management > Overview > Instances > Process Status Viewer > View Dataslots You can resume any suspended process instance by changing its Status from the drop-down list. |
| bl_pi_view_any_any | Case 1:Permissions: ---Portal Configuration: ---  
  Case 2:Permissions: Any of the following  
  • bl_pt_any_any  
  • bl_pt_view_any  
  • bl_pt_update_any  
  Business Process Portal Configuration: Management > Overview | Home > My Instances You can only view the workstep details of the process instance created by you, by using PSV chart.  
 Management > Overview > Instances You can only view the process instance’s workstep details by using PSV chart. |

For these permissions, optionally, you can also specify the <creator>. For example, `bl_pi_view_any_any_<creator>`. In such a case, it allows you to perform the specified action on all process instances of the `<creator>`. Please note that, if you specify a `<creator>`, then such a permission ignores the specific process instance name and allows you to perform the specified action on all process instances of the `<creator>`. Also note that, like other fields, the `<creator>` field is used as a constraint or filter to limit the access.
<table>
<thead>
<tr>
<th>Permission</th>
<th>Pre-requisite</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>bl_pi_update_any_any</code></td>
<td>Case 1: Permissions: --- Business Process Portal Configuration: ---</td>
<td>Home &gt; My Instances You can only view the workstep details of the process instance created by you, by using PSV chart.</td>
</tr>
<tr>
<td></td>
<td>Case 2: Permissions: Any of the following • <code>bl_pt_any_any</code> • <code>bl_pt_view_any</code> • <code>bl_pt_update_any</code></td>
<td>Management &gt; Overview &gt; Instances You can modify the process instance’s workstep details by using PSV chart.</td>
</tr>
<tr>
<td><code>bl_ds_view_any_any</code></td>
<td>Permissions: All of the following • <code>bl_pt_&lt;any or view or update&gt;_any</code> • <code>bl_pi_&lt;any or view or update&gt;_any_any</code></td>
<td>Management &gt; Overview &gt; Instances &gt; Process Status Viewer &gt; View Dataslots You can only view the dataslot values.</td>
</tr>
<tr>
<td></td>
<td>Note: This Permission is not supported for Global Dataslots.</td>
<td>Management &gt; Overview &gt; Instances &gt; Process Status Viewer &gt; View Dataslots You can only view the dataslot values.</td>
</tr>
<tr>
<td><code>bl_ds_update_any_any</code></td>
<td>Permissions: All of the following • <code>bl_pt_&lt;any or update&gt;_any</code> • <code>bl_pi_&lt;any or update&gt;_any_any</code></td>
<td>Management &gt; Overview &gt; Instances &gt; Process Status Viewer &gt; View Dataslots You can view or modify the dataslot values.</td>
</tr>
<tr>
<td></td>
<td>Note: This Permission is not supported for Global Dataslots.</td>
<td>Management &gt; Overview &gt; Instances &gt; Process Status Viewer &gt; View Dataslots You can view or modify the dataslot values.</td>
</tr>
</tbody>
</table>

**Example**

`bl_ds_any_any_any_any`
Let us assume that the administrator "ebms" wants to grant the permission to a user "user1" to modify the dataslot values of any instance of any process. In order to do so, the user will need permission to access the process instance (bl_pi_any_any), and to access the process instance, the user needs permission to access the process template (bl_pt_any_any). Also, to access the dataslots, the user needs access to the Management > Overview menu option. The administrator grants all these permissions and access to the menu option using the User Details page.

The user can now login in Business Process Portal and go to the Instances Overview page. On this page he/she can click the Process Status Viewer icon in the Chart column to open the Process Status Viewer page. Click View Dataslots to open the View Dataslot page. As the user "user1" has permission to perform any operation on the dataslots, he/she can modify the values of any dataslots.

**BPM Events permissions**

This section explains various BPM Events permissions and scope.

**Abbreviations**

The abbreviations for the component options used in the BPM Events permissions are as follows:

- bp: BPMEvents
- ip: Infopad

**Scope of a permission**

In the case of a resource such as infopad, the options include "Any" and the list of infopads. If you select Any while creating a permission, then the scope of that permission is across all infopads; whereas if you select a particular infopad, then the scope of that permission is limited only to the selected infopad. For example, the permission bp_ip_any_any allows you to view or update any of the existing infopads, but bp_ip_any_<specific_ip> allows you to view or update only the selected infopad. The following table lists only the permissions with "Any" option; wherever applicable, you may select a specific entity instead of Any to limit the scope.

<table>
<thead>
<tr>
<th>Permission</th>
<th>Pre-requisite</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>bp_ip_any_any (Default InfoPad permission)</td>
<td>Permissions: ---Business Process Portal Configuration: Management &gt; Infopads</td>
<td>Management &gt; Infopads You can modify the infopad slot values.</td>
</tr>
<tr>
<td>bp_ip_view_any</td>
<td>Permissions: ---Business Process Portal Configuration: Management &gt; Reports</td>
<td>Management &gt; Reports &gt; My Reports You can only view the infopad reports.</td>
</tr>
<tr>
<td>bp_ip_update_any</td>
<td>Permissions: ---Business Process Portal Configuration: Management &gt; Infopads</td>
<td>Management &gt; Infopads You can modify the infopad slot values.</td>
</tr>
</tbody>
</table>

**Example**

bp_ip_update_any
Let us assume that the administrator "admin" wants to grant the permission to a user "user2" to modify any infopad slot values of any instance of infopad. Also, to access the infopads, the user needs access to the Management > Infopad menu option. The administrator grants the permission and access to the menu option using the User Details page.

The user can now login in the Business Process Portal and click Management > Infopads to open the Infopads page. As the user "user2" has permission to perform any operation on the infopad slot values, he/she can view and/or modify any of the infopad slot values.

Management permissions

This section explains various management permissions and scope.

Abbreviations

The abbreviations for the component options used in the Management permissions are as follows:

- mgm: Management
- rep: Report
- exe: Execute
- repbuild: ReportBuilder
- com: Common
- ext: External Report
- bsqlrep: BPM SQL Report
- oob: Out-of-the-box Report

Scope of a permission

In the case of resources such as report, the options include "Any" and the list of applications. If you select Any while creating a permission, then the scope of that permission is across all applications; whereas if you select a particular application, then the scope of that permission is limited only to the selected application. For example, the permission mgm_rep_exe_any_any allows you to execute any of the existing reports of any application, but mgm_rep_exe_<specific_app>_<specific_rep> allows you to execute only the selected reports of the selected application. The following table lists only the permissions with "Any" option; wherever applicable, you may select a specific entity instead of Any to limit the scope.

Table 56: Management permissions and their usage

<table>
<thead>
<tr>
<th>Permission</th>
<th>Pre-requisite</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>mgm_rep_exe_any_any</td>
<td>Permissions: ---Business Process Portal Configuration: Management &gt; Reports</td>
<td>Management &gt; Reports You can execute the existing reports.</td>
</tr>
<tr>
<td>mgm_rep_exe_com_any</td>
<td>Permissions: ---Business Process Portal Configuration: Management &gt; Reports</td>
<td>Management &gt; Reports You can execute the existing common reports.</td>
</tr>
</tbody>
</table>
## Working with permissions

<table>
<thead>
<tr>
<th>Permission</th>
<th>Pre-requisite</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>mgm_rep_exe_oob_any</td>
<td>Permissions: ---Business Process Portal Configuration: Management &gt; Reports</td>
<td><strong>Management &gt; Reports</strong> You can execute the existing out-of-the-box reports.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Management &gt; Reports You can create, remove or update Multi-Application, Query, Infopad, HTML, Crystal and BPM SQL reports.</td>
</tr>
<tr>
<td>mgm_repbuild_any_any</td>
<td>Permissions: All of the following</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• bl_pt_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• bl_pt_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• bl_pi_any_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• bp_ip_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• mgm_rep_exe_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• mgm_bsqrep_exe_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Business Process Portal Configuration: Management &gt; Reports</td>
<td>Management &gt; Reports You can create, remove, update HTML, Crystal and BPM SQL reports.</td>
</tr>
<tr>
<td>mgm_repbuild_any_ext</td>
<td>Permissions: All of the following</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• mgm_rep_exe_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• mgm_bsqrep_exe_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Business Process Portal Configuration: Management &gt; Reports</td>
<td>Management &gt; Reports You can create, remove, update HTML, Crystal and BPM SQL reports.</td>
</tr>
<tr>
<td>mgm_repbuild_any_sbm</td>
<td>Permissions: All of the following</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• bl_pt_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• bl_pi_any_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• bp_ip_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• mgm_rep_exe_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• mgm_bsqrep_exe_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Business Process Portal Configuration: Management &gt; Reports</td>
<td>Management &gt; Reports You can create, remove or update Multi-Application, Query and Infopad reports.</td>
</tr>
<tr>
<td>mgm_repbuild_create_any</td>
<td>Permissions: All of the following</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• bl_pt_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• bl_pi_any_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• bp_ip_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Portal Configuration: Management &gt; Reports</td>
<td>Management &gt; Reports You can create Multi-Application, Query, Infopad, HTML, Crystal and BPM SQL reports.</td>
</tr>
<tr>
<td>Permission</td>
<td>Pre-requisite</td>
<td>Usage</td>
</tr>
<tr>
<td>-------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>mgm_repbuild_create_sbm</td>
<td>Permissions: All of the following</td>
<td>Management &gt; Reports You can create Multi-Application, Query and Infopad reports.</td>
</tr>
<tr>
<td>mgm_repbuild_remove_any</td>
<td>Permissions: All of the following</td>
<td>Management &gt; Reports You can remove Multi-Application, Query, Infopad, HTML, Crystal and BPM SQL reports.</td>
</tr>
<tr>
<td>mgm_repbuild_remove_ext</td>
<td>Permissions: All of the following</td>
<td>Management &gt; Reports You can remove HTML, Crystal and BPM SQL reports.</td>
</tr>
<tr>
<td>mgm_repbuild_remove_sbm</td>
<td>Permissions: <code>mgm_rep_exe_any_any</code></td>
<td>Management &gt; Reports You can remove Multi-Application, Query and Infopad reports.</td>
</tr>
<tr>
<td>mgm_repbuild_update_any</td>
<td>Permissions: All of the following</td>
<td>Management &gt; Reports You can update Multi-Application, Query, Infopad, HTML, Crystal and BPM SQL reports.</td>
</tr>
</tbody>
</table>
### Working with permissions

<table>
<thead>
<tr>
<th>Permission</th>
<th>Pre-requisite</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>mgm_repbld_update_ext</td>
<td>Permissions: All of the following</td>
<td><strong>Management &gt; Reports</strong> You can update HTML, Crystal and BPM SQL reports.</td>
</tr>
<tr>
<td></td>
<td>• mgm_rep_exe_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• mgm_bsqlrep_exe_any</td>
<td></td>
</tr>
<tr>
<td>Business Process Portal</td>
<td><strong>Management &gt; Reports</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Configuration: <strong>Management &gt; Reports</strong></td>
<td></td>
</tr>
<tr>
<td>mgm_repbld_update_sbm</td>
<td>Permissions: All of the following</td>
<td><strong>Management &gt; Reports</strong> You can update Multi-Application, Query and Infopad reports.</td>
</tr>
<tr>
<td></td>
<td>• bl_pt_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• bl_pi_any_any</td>
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<tr>
<td></td>
<td>• bp_ip_any_any</td>
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</tr>
<tr>
<td></td>
<td>• mgm_rep_exe_any_any</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• mgm_bsqlrep_exe_any</td>
<td></td>
</tr>
<tr>
<td>Business Process Portal</td>
<td><strong>Management &gt; Reports</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Configuration: <strong>Management &gt; Reports</strong></td>
<td></td>
</tr>
<tr>
<td>mgm_bsqlrep_exe_any</td>
<td>Permissions: mgm_rep_exe_any_any</td>
<td><strong>Management &gt; Reports</strong> You can view BPM SQL reports.</td>
</tr>
<tr>
<td>Business Process Portal</td>
<td><strong>Management &gt; Reports</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Configuration: <strong>Management &gt; Reports</strong></td>
<td></td>
</tr>
<tr>
<td>mgm_bsqlrep_exe_&lt;query_filename&gt;</td>
<td>Permissions: mgm_rep_exe_any_any</td>
<td><strong>Management &gt; Reports</strong> You can view a specific BPM SQL reports.</td>
</tr>
<tr>
<td>Business Process Portal</td>
<td><strong>Management &gt; Reports</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Configuration: <strong>Management &gt; Reports</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Example**

mgm_repbld_update_any

Let us assume that the administrator "ebms" wants to grant the permission to a user "user3" to update any report using the report builder. In order to do so, the user needs permission to access the report (mgm_rep_exe_any_any). Also, to access the reports, the user will need access to the Management > Reports menu option. The administrator grants the permission and access to the menu option using the **User Details** page.

The user can now login in the Business Process Portal and click **Management > Reports > My Reports** to open the **Report List** page. As the user "user3" has permission to update any report, he/she can modify any of the Multi-Application, Query, Infopad, HTML, Crystal and BPM SQL reports by clicking the Edit Report icon in the Report Name column.

---

**Administration permissions**

This section explains various administration permissions and scope.
Abbreviations

The abbreviations for the component options used in the Administration permissions are as follows:

- *adm*: Administration
- *app*: Application
- *bs*: BPM Webflow
- *sbm*: BP Server Applications
- *exe*: Execute
- *mod*: Business Process Modeler
- *conf*: Configuration
- *que*: Queue
- *addmem*: Add Member
- *remmem*: Remove Member
- *rc*: Reusable Components
- *imp*: Import
- *exp*: Export
- *del*: Delete
- *log*: Log File
- *serv*: Server
- *viewstat*: View Status
- *grp*: Group
- *chrole*: Change Role
- *usr*: User
- *perm*: Permission

Scope of a Permission

In the case of resources such as application, the options include "Any" and the list of applications. If you select *Any* while creating a permission, then the scope of that permission is across all applications; whereas if you select a particular application, then the scope of that permission is limited only to the selected application. For example, the permission *adm_app_install_any_any* allows you to install any of the existing Web or Business Process Server applications, but *adm_app_install_any_<specific_app>* allows you to install only the selected application. The following table lists only the permissions with "Any" option, wherever applicable; you may select a specific entity instead of *Any* to limit the scope.

Table 57: Administration permissions and their usage

<table>
<thead>
<tr>
<th>Permission</th>
<th>Pre-requisite</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>adm_app_any_any_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; Applications</td>
<td>Administration &gt; Applications You can perform any action on any Web or Business Process Server application.</td>
</tr>
</tbody>
</table>
### Working with permissions

<table>
<thead>
<tr>
<th>Permission</th>
<th>Pre-requisite</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>adm_app_any_bs_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; Applications</td>
<td>Administration &gt; Applications You can perform any action on any Web application.</td>
</tr>
<tr>
<td>adm_app_exe_any_any</td>
<td>Not supported because execute action is available only for Web applications.</td>
<td>Not applicable.</td>
</tr>
<tr>
<td>adm_app_exe_bs_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; Applications</td>
<td>Administration &gt; Applications You can execute any Web application.</td>
</tr>
<tr>
<td>adm_app_exe_sbm_any</td>
<td>Not supported because execute action is available only for Web applications.</td>
<td>Not applicable.</td>
</tr>
<tr>
<td>adm_app_install_any_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; Applications</td>
<td>Administration &gt; Applications You can install any Web or Business Process Server application.</td>
</tr>
<tr>
<td>adm_app_uninstall_any_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; Applications</td>
<td>Administration &gt; Applications You can uninstall any Web or Business Process Server application.</td>
</tr>
<tr>
<td>adm_app_uninstall_bs_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; Applications</td>
<td>Administration &gt; Applications You can uninstall any Web application.</td>
</tr>
<tr>
<td>adm_app_suspend_any_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; Applications</td>
<td>Administration &gt; Applications You can suspend any Web or Business Process Server application.</td>
</tr>
<tr>
<td>Permission</td>
<td>Pre-requisite</td>
<td>Usage</td>
</tr>
<tr>
<td>----------------------------</td>
<td>----------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>adm_app_suspend_sbm_any</td>
<td>Permissions: Business Process</td>
<td>Administration &gt; Applications</td>
</tr>
<tr>
<td></td>
<td>Portal Configuration: Administration</td>
<td>You can suspend any Business Process Server application.</td>
</tr>
<tr>
<td></td>
<td>&gt; Applications</td>
<td></td>
</tr>
<tr>
<td>adm_app_resume_any_any</td>
<td>Permissions: Business Process</td>
<td>Administration &gt; Applications</td>
</tr>
<tr>
<td></td>
<td>Portal Configuration: Administration</td>
<td>You can resume any suspended Web or Business Process Server application.</td>
</tr>
<tr>
<td></td>
<td>&gt; Applications</td>
<td></td>
</tr>
<tr>
<td>adm_app_resume_sbm_any</td>
<td>Permissions: Business Process</td>
<td>Administration &gt; Applications</td>
</tr>
<tr>
<td></td>
<td>Portal Configuration: Administration</td>
<td>You can resume any suspended Business Process Server application.</td>
</tr>
<tr>
<td></td>
<td>&gt; Applications</td>
<td></td>
</tr>
<tr>
<td>adm_app_publish_any_any</td>
<td>Permissions: Business Process</td>
<td>Administration &gt; Applications</td>
</tr>
<tr>
<td></td>
<td>Portal Configuration: Administration</td>
<td>You can publish any Web or Business Process Server application.</td>
</tr>
<tr>
<td></td>
<td>&gt; Applications</td>
<td></td>
</tr>
<tr>
<td>adm_app_publish_bs_any</td>
<td>Permissions: Business Process</td>
<td>Administration &gt; Applications</td>
</tr>
<tr>
<td></td>
<td>Portal Configuration: Administration</td>
<td>You can publish any Web application.</td>
</tr>
<tr>
<td></td>
<td>&gt; Applications</td>
<td></td>
</tr>
<tr>
<td>adm_app_unpublish_any_any</td>
<td>Permissions: Business Process</td>
<td>Administration &gt; Applications</td>
</tr>
<tr>
<td></td>
<td>Portal Configuration: Administration</td>
<td>You can unpublish any published Web or Business Process Server application.</td>
</tr>
<tr>
<td></td>
<td>&gt; Applications</td>
<td></td>
</tr>
<tr>
<td>adm_app_unpublish_sbm_any</td>
<td>Permissions: Business Process</td>
<td>Administration &gt; Applications</td>
</tr>
<tr>
<td></td>
<td>Portal Configuration: Administration</td>
<td>You can unpublish any published Business Process Server application.</td>
</tr>
<tr>
<td></td>
<td>&gt; Applications</td>
<td></td>
</tr>
<tr>
<td>adm_app_unpublish_bs_any</td>
<td>Permissions: Business Process</td>
<td>Administration &gt; Applications</td>
</tr>
<tr>
<td></td>
<td>Portal Configuration: Administration</td>
<td>You can unpublish any published Web application.</td>
</tr>
<tr>
<td></td>
<td>&gt; Applications</td>
<td></td>
</tr>
<tr>
<td>adm_mod_any_any</td>
<td>Permissions: ---Business Process</td>
<td>You can create or update a model using the Business Process Modeler and view or delete a model using the Process Repository Admin.</td>
</tr>
<tr>
<td></td>
<td>Portal Configuration: ---</td>
<td></td>
</tr>
<tr>
<td>adm_mod_create_any</td>
<td>Permissions: ---Business Process</td>
<td>You can create a model using the Business Process Modeler.</td>
</tr>
<tr>
<td></td>
<td>Portal Configuration: ---</td>
<td></td>
</tr>
<tr>
<td>Permission</td>
<td>Pre-requisite</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><code>adm_mod_create_&lt;specific_mod&gt;</code></td>
<td>Permissions: --- Business Process Porta Configuration: ---</td>
<td>It is recommended that you should use the &quot;adm_mod_create_any&quot; permission instead of this one.</td>
</tr>
<tr>
<td><code>adm_mod_view_any</code></td>
<td>Permissions: --- Business Process Porta Configuration: ---</td>
<td>You can view the summary of any model using the Process Repository Admin.</td>
</tr>
<tr>
<td><code>adm_mod_remove_any</code></td>
<td>Permissions: --- Business Process Porta Configuration: ---</td>
<td>You can remove any model using the Process Repository Admin.</td>
</tr>
<tr>
<td><code>adm_conf_any_any</code></td>
<td>Permissions: --- Business Process Porta Configuration: <img src="System" alt="Administration System" /></td>
<td>Administration &gt; System You can view or update any configuration file.</td>
</tr>
<tr>
<td><code>adm_conf_view_any</code></td>
<td>Permissions: --- Portal Configuration: <img src="System" alt="Administration System" /></td>
<td>Administration &gt; System You can only view any configuration file.</td>
</tr>
<tr>
<td><code>adm_que_any_any</code></td>
<td>Permissions: Business Process Porta Configuration: ![Administration User Management](User Management)</td>
<td>Administration &gt; User Management You can create, update, remove, add a member and remove a member from a queue.</td>
</tr>
<tr>
<td><code>adm_que_create_any</code></td>
<td>Permissions: Business Process Porta Configuration: ![Administration User Management](User Management)</td>
<td>Administration &gt; User Management You can create any queue.</td>
</tr>
<tr>
<td><code>adm_que_remove_any</code></td>
<td>Permissions: Business Process Porta Configuration: ![Administration User Management](User Management)</td>
<td>Administration &gt; User Management You can remove any queue.</td>
</tr>
<tr>
<td><code>adm_que_addmem_any</code></td>
<td>Permissions: Business Process Porta Configuration: ![Administration User Management](User Management)</td>
<td>Administration &gt; User Management You can add a member in any queue.</td>
</tr>
<tr>
<td><code>adm_que_remmem_any</code></td>
<td>Permissions: Business Process Porta Configuration: ![Administration User Management](User Management)</td>
<td>Administration &gt; User Management You can remove a member from any queue.</td>
</tr>
<tr>
<td>Permission</td>
<td>Pre-requisite</td>
<td>Usage</td>
</tr>
<tr>
<td>-------------------</td>
<td>---------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>adm_que_view_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; User Management</td>
<td>Administration &gt; User Management You can view any queue.</td>
</tr>
<tr>
<td>adm_rc_any</td>
<td>Permissions: ---Business Process Portal Configuration: ---</td>
<td>You can import, export or delete a reusable component.</td>
</tr>
<tr>
<td>adm_rc_imp</td>
<td>Permissions: ---Business Process Portal Configuration: ---</td>
<td>You can only import a reusable component.</td>
</tr>
<tr>
<td>adm_rc_exp</td>
<td>Permissions: ---Business Process Portal Configuration: ---</td>
<td>You can only export a reusable component.</td>
</tr>
<tr>
<td>adm_rc_del</td>
<td>Permissions: ---Business Process Portal Configuration: ---</td>
<td>You can only delete a reusable component.</td>
</tr>
<tr>
<td>adm_serv_any_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; System</td>
<td>Administration &gt; System &gt; Status You can start, stop, suspend, resume or view status of any of the server from Archiver, BP Server, BPM Events, or EventPublisher.</td>
</tr>
<tr>
<td>adm_serv_start_any</td>
<td>Permissions: adm_serv_viewstat_any Business Process Portal Configuration: Administration &gt; System</td>
<td>Administration &gt; System &gt; Status You can start any of the server from Archiver, BP Server, BPM Events, or EventPublisher.</td>
</tr>
<tr>
<td>adm_serv_stop_any</td>
<td>Permissions: adm_serv_viewstat_any Business Process Portal Configuration: Administration &gt; System</td>
<td>Administration &gt; System &gt; Status You can stop any of the server from Archiver, BP Server, BPM Events, or EventPublisher.</td>
</tr>
<tr>
<td>adm_serv_viewstat_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; System</td>
<td>Administration &gt; System &gt; Status You can view status of any of the server from Archiver, BP Server, BPM Events or EventPublisher.</td>
</tr>
<tr>
<td>Permission</td>
<td>Pre-requisite</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>adm_grp_any_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; User Management</td>
<td>Administration &gt; User Management &gt; Groups You can create, update, remove a group, add a member to a group, remove a member from a group or change the role of a member.</td>
</tr>
<tr>
<td>adm_grp_create_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; User Management</td>
<td>Administration &gt; User Management &gt; Groups You can create a group.</td>
</tr>
<tr>
<td>adm_grp_remove_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; User Management</td>
<td>Administration &gt; User Management &gt; Groups You can remove any group.</td>
</tr>
<tr>
<td>adm_grp_addmem_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; User Management</td>
<td>Administration &gt; User Management &gt; Groups You can add a member to any group.</td>
</tr>
<tr>
<td>adm_grp_remmem_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; User Management</td>
<td>Administration &gt; User Management &gt; Groups You can remove a member from any group.</td>
</tr>
<tr>
<td>adm_grp_chrole_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; User Management</td>
<td>Administration &gt; User Management &gt; Groups You can change the role of any member.</td>
</tr>
<tr>
<td>adm_usr_any_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; User Management</td>
<td>Administration &gt; User Management &gt; Users You can create, remove, update a user or specify delegate settings for any user.</td>
</tr>
<tr>
<td>adm_usr_create_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; User Management</td>
<td>Administration &gt; User Management &gt; Users You can create a user.</td>
</tr>
<tr>
<td>adm_usr_remove_any</td>
<td>Permissions: Business Process Portal Configuration: Administration &gt; User Management</td>
<td>Administration &gt; User Management &gt; Users You can remove any user.</td>
</tr>
</tbody>
</table>
### Dashboard permissions

This section explains various dashboard permissions and scope.

#### Abbreviations

The abbreviations for the component options used in the Dashboard permissions are as follows:

- **db**: Dashboard
- **cp**: Component
- **com**: Common

---

<table>
<thead>
<tr>
<th>Permission</th>
<th>Pre-requisite</th>
<th>Usage</th>
</tr>
</thead>
</table>

**Example**

adm_serv_any_any

Let us assume that the administrator "ebms" wants to grant the permission to a user "user4" to perform any operation on any server. To access the servers, the user needs access to the Administration > System menu option. The administrator grants the permission and access to the menu option using the **User Details** page.

The user can now login in Business Process Portal and click Administration > System > Status to open the **Report List** page. As the user "user4" has permission to perform any operation, he/she can start, stop, suspend, resume or view status of any of the Archiver, BP Server, BPM Events or EventPublisher servers.
• pt: Process Template

**Scope of a permission**

You can select only Component as the resource type and "View" as action. If you select Any for the process template while creating a permission, then the scope of that permission is across all process templates; whereas if you select a particular process template, then the scope of that permission is limited only to the selected process template. Similarly, you can also control the scope by specifying Any or a specific component. For example, the permission `db_cp_view_<specific pt>_any` allows you to view any component of the specified process template. The following table lists only the permissions with "Any" option; wherever applicable, you may select a specific entity instead of Any to limit the scope.

**Table 58: Dashboard permissions and their usage**

<table>
<thead>
<tr>
<th>Permission</th>
<th>Pre-requisite</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>db_cp_view_any_any</code> (Default Dashboard component permission)</td>
<td>Permissions: ---Business Process Portal Configuration: Home &gt; Dashboard</td>
<td>Home &gt; Dashboard You can only view the component.</td>
</tr>
<tr>
<td><code>db_cp_view_any_&lt;specific cp&gt;</code></td>
<td>Permissions: ---Business Process Portal Configuration: Home &gt; Dashboard</td>
<td>Home &gt; Dashboard You can view only the specified component of any process template.</td>
</tr>
<tr>
<td><code>db_cp_view_com_any</code></td>
<td>Permissions: ---Business Process Portal Configuration: Home &gt; Dashboard</td>
<td>Home &gt; Dashboard You can view any of the dashboard components which are common for all process templates.</td>
</tr>
<tr>
<td><code>db_cp_view_&lt;specific pt&gt;_&lt;specific cp&gt;</code></td>
<td>Permissions: ---Business Process Portal Configuration: Home &gt; Dashboard</td>
<td>Home &gt; Dashboard You can view only the specified component of the specified process template.</td>
</tr>
</tbody>
</table>

**Example**

`db_cp_view_any_any`

Let us assume that the administrator "ebms" wants to grant the permission to a user "user2" to view any component of any process template. Also, to access the component, the user needs access to the Home > Dashboard menu option. The administrator grants the permission and access to the menu option using the User Details page.

The user can now log in to Business Process Portal and click Home > Dashboard to open the Dashboard List/Dashboard page. As the user "user2" has permission, he/she can view any component of any process template.
Managing applications

This chapter explains how to use the Administration module of Business Process Portal to manage Business Process Server and BPM Webflow applications, and to publish and unpublish Business Process Server applications as Web services.

Business Process Server provides a series of user interfaces in the Applications menu under the Administration module of Business Process Portal that enables you to manage applications.

**Note:** You may also publish and install Business Process Server applications using BPServerAdmin, a command-oriented interface. Refer to the *BP Server Developer's Guide* for a description of the most commonly used BPServerAdmin commands.

For details, see the following topics:

- Managing Business Process Server applications
- Suspending and resuming applications
- Versioning of Business Process Server applications
- Managing BPM Webflow applications

Managing Business Process Server applications

Once a user or application developer defines a process template in Business Process Studio, you, as a Business Process Server administrator, can publish and install the process template in the BP Server and load any associated rules into BPM Webflow.
In the Administration module, click **Applications > BP Server**, to view the **BP Server Applications** page.

*Figure 79: BP Server Application page*

In the BP Server application page, you can filter the application based on:

- Ready to Install: The application available for installation are listed in this page.
- Installed: The installed applications are listed in this page.
- Suspended: The suspended applications are listed.
- Deprecated: If you update any application with newer version, then the older deprecated applications are listed here.
The **BP Server Applications** page contains information on:

- **Application Name**: the name of the application. Business Process Server supports versioning for applications, where a new version can be installed on an existing application. In the case of a versioned application, this displays the name of the application of which the current process template is a version.

- **Version Name**: Displays the version name of the application.

- **Process Type**: Displays the process type.

- **Group Access**: Displays whether the group option is selected in Progress Developer Studio for OpenEdge. Indicates which group of users is allowed to view and execute this project. You can only specify one group in Progress Developer Studio for OpenEdge.

- **Category**: Displays the different type of projects as defined in Progress Developer Studio for OpenEdge.

- **Migrate ACL**: select this check box if you want to migrate permissions of another application with same application name to current application.

- **Rule**, indicating whether the application contains rules (Yes) or has none (No). If BPM Webflow is not running, then Business Process Server allows you to install or uninstall applications without rules, but BPM Webflow must be running if you want to install/uninstall applications that contain rules.

- **Installed Date**: Displays the installed date and time of the application.

---

### Installing Business Process Server applications

At run time when an application is installed, Business Process Server copies the `<Application Server>\ebmsapps` folder to the Web application directory to make its Web pages, JSPs, images, etc. available for an application server to use (paths to the `ebmsapps` folder vary according to the application server you are using; in JBoss, for example, the path is `%OEBPS_HOME%\webapps\deploy\sbm.war\ebmsapps`). Once an application is uninstalled, the application specific directory is removed.

**Note:** Before you install an application available to a specified group, make sure that the group exists in the current Business Process Server user management system.

---

**To install one or more Business Process Server applications:**

1. In the Administration module, click **Applications > BP Server**, to view the **BP Server Applications** page. Refer Figure 79 on page 214.

2. Select **Ready to Install** option. The applications which are available for installation are listed in this page.

3. Select the Business Process Server application you wish to install from the list by selecting it, and click **Install**. The selected applications are installed.

   For more details about this operation, see **Selecting and clearing rows** on page 35.

   You select a parent name when you install a new version over an existing version.
Viewing installed BP Server applications

To view installed applications:

1. In the Administration module, click Applications > BP Server, to view the BP Server Applications page.
   Refer Figure 79 on page 214.

2. Select Installed option. The installed applications are listed in this page.

3. Optionally, to uninstall, select the Business Process Server applications you need to uninstall from the list, and click Uninstall. The confirmation message box appears.

4. Optionally, select Force Uninstall to remove any active or suspended process instances.
   When you uninstall an application, Business Process Server removes the process template and unloads the rules from BPM Workflow. The application specific directory is removed.

5. To refresh an application, click Refresh button for the application for which you need to refresh.

6. To publish an application, click the Publish next to the application. Refer Publishing Business Process Server applications as Web Services on page 218 for more information.

Business Process Server uninstalls the selected application(s).

Note: If you have OpenEdge database, then it is recommended to have a period of 3 minutes between uninstalling an application and installing an application with the same name again. If the install operation is done within 3 minutes of ‘uninstall’ operation or if you try to perform reinstall operation from Progress Developer Studio for OpenEdge, then you may see errors in bpmprocessstore.log file for processing ‘P_INSTALLED’ event. Please ignore these errors as after few minutes BPM Process Store can recover from such errors.
Suspending and resuming applications

You may want to suspend an application if, for example, you are phasing out an outdated application, Application1, and installing a new application, Application2. By suspending Application1, you enable its existing process instances to remain for users to complete uninterrupted, while only new process instances may be started in Application2. You may also resume a suspended application if, for example, you made changes to the template of Application1 and you would like to resume the application.

You may also suspend and resume applications (also referred to as process templates) in BP Server Admin. Refer to the BP Server Developer's Guide for a description of these BP Server commands.

**Note:** You can suspend and resume installed applications only.

Suspending installed Business Process Server applications

To suspend one or more Business Process Server applications:

1. In the Administration module, click Applications > BP Server, to view the BP Server Applications page.
   Refer Figure 79 on page 214.
2. Select Installed option. The installed applications are listed in this page.
3. Select the Business Process Server application you wish to suspend from the list by selecting it, and click Suspend.
   For more details about this operation, see Selecting and clearing rows on page 35.

Business Process Server suspends the selected application(s).

Resuming suspended applications

Only suspended applications can be resumed.

To resume one or more suspended applications, complete the following steps:

1. In the Administration module, click Applications > BP Server, to view the BP Server Applications page.
   Refer Figure 79 on page 214.
2. Select Suspended option. It lists the suspended applications.
3. Select the suspended Business Process Server application you wish to resume from the list by selecting it, and click Resume.
   For more details about this operation, see Selecting and clearing rows on page 35.

Business Process Server resumes the suspended application(s).
Publishing Business Process Server applications as Web Services


**Note:** You cannot publish more than one application simultaneously.

To publish Business Process Server applications as Web Services:

1. In the Administration module, click **Applications > BP Server**, to view the **BP Server Applications** page.
   Refer Figure 79 on page 214.

2. Select **Installed** option. The applications which are installed are listed in this page.

3. Click the **Publish** icon next to the Business Process Server application you need to publish as a Web service.

   The **Publish Application** page is displayed.

   **Figure 81: Publish application page**

4. Select the activities (service operations) you want to publish. Optionally, enter a service description. Click **Publish**.

   Business Process Server publishes the selected application as a Web Service.

Unpublishing Business Process Server application Web Services

To unpublish a Business Process Server Web Services application, complete the following steps:

1. In the Administration module, click **Applications > BP Server**, to view the **BP Server Applications** page.
Refer Figure 79 on page 214.

2. Select **Installed** option. The applications which are installed are listed in this page.

3. Select the Unpublish icon next to Business Process Server application, and click **UnPublish** icon.

Business Process Server unpublishes the selected published application(s).

### Versioning of Business Process Server applications

You can create a new version of an existing Business Process Server application using Progress Developer Studio for OpenEdge. Versioning is helpful where your existing process template is deprecated, and the modified process template is installed with the same application name. While installing a new version of a process template from the **BP Server Applications** page in Business Process Portal, you can select the **Migrate ACL** checkbox to migrate the permissions of the existing process template to the new process template. If a similar change is required again, then you can install another new version, and deprecate all the other versions. Whenever you must work on any deprecated version, you must uninstall the versions created after that. For more information about creating versions, see the *OpenEdge Getting Started: Developing BPM Applications with Developer Studio*.

You can remove the previous version, which is deprecated, only when all the existing instances of the deprecated application are completed. If you remove the latest (active) version, then there will not be any active version. You can manually activate the process template deprecated immediately before the latest version or install a new process template as an active version.

Versioning does not allow you to activate multiple versions simultaneously.

You can view the old versions of Business Process Server applications by selecting the **Deprecated** option in Business Process Server applications page.

**Note:** If you try to resume a deprecated application, without uninstalling its previous version, then an exception will be thrown in `bpmportal.log` file.

### Managing BPM Webflow applications

The flow of a BPM Webflow process (the presentation flow) is developed with Progress Developer Studio for OpenEdge. Business Process Server application developers define the presentation flow for a BPM Webflow application, saving the process definition as a process template in XML. An entire BPM Webflow process can be contained in a single workstep in Progress Developer Studio for OpenEdge.

As a Business Process Server administrator, you are responsible for installing and otherwise managing BPM Webflow applications. You must also know which BPM Webflow applications are being used as worksteps in Business Process Server processes so that you can install them and they are available to Business Process Server users. BPM Webflow is transparent to Business Process Server end users, who use the Home module as a client of BPM Webflow.
Installing BPM Webflow applications

To install one or more BPM Webflow applications:

1. In the Administration module, click Applications > BPM Webflow, to view the BPM Webflow Applications page.

   This page displays all current BPM Webflow applications, as shown in the following figure.

   **Figure 82: Installing BPM Webflow applications**

   ![BPM Webflow Applications page](image)

   2. Select a status from the Status drop-down list and click Go to display only the applications having the selected status.

   The BPM Webflow Applications page contains information on:

   - **Status**, indicating the current status of the application. Options include Installed, and Uninstalled.
   - **Name**, or the name assigned by the developer when defining the process template in OpenEdge.
   - **Label**, or the name users see in Business Process Portal. The developer defines this name as the Label when designing the process template in OpenEdge.
   - **Description**, providing a brief description of the application. If required, then you can define the description as a text link to a lengthier, more detailed description.

3. Select the BPM Webflow application you wish to install from the list by selecting it, and click Install. For more details about this operation, see Selecting and clearing rows on page 35.

   Business Process Server installs the selected BPM Webflow application(s).

   **Note**: You may also install and uninstall BPM Webflow applications in OpenEdge. Select Project > Publish from the Servers view in Progress Developer Studio for OpenEdge. For more information, see the OpenEdge Getting Started: Developing BPM Applications with Developer Studio.

   Once a BPM Webflow application is installed, the Webflow becomes one of two processes: a workstep within a BPM Webflow process.
Uninstalling BPM Webflow applications

To uninstall a BPM Webflow application, complete the following steps:

1. Perform steps 1 and 2 outlined in Installing BPM Webflow applications on page 220.
2. Select the BPM Webflow application you wish to uninstall from the list by selecting it, and click Uninstall.

For more details about this operation, see Selecting and clearing rows on page 35.

Business Process Server uninstalls the selected BPM Webflow application(s).
Migrating instances

This chapter explains how to migrate instances of one application as the instances of another application by using the Business Process Portal interface and the migration utility.

In a dynamic organization, processes continuously undergo change. The cost of ownership of processes can be significantly affected when changes are not promptly applied to running instances of processes. The "Instance Migration" feature of Business Process Portal can help reduce the cost of ownership of processes by allowing for bulk migration of instances of processes from one application to another.

For example, you have few instances of application "Application". Then you created another application with name "Application_version1". You can use the instance migration feature to migrate the existing instances of application "Application" as the instances of new application "Application_version1". After migrating an instance the source instance is suspended. The name of the migrated instance has the following nomenclature:

<source_instance_name>#IM#<target_instance_id>

Business Process Portal and the instancemigration utility, both generate appropriate entries in the pim.log file.

**Note:** The current version of Business Process Server does not support instance migration to a target application which is in a deprecated state.

When you migrate the instances in which worksteps that are mapped to worksteps of target application are in the different state, how it works:

**Active state** — For worksteps in active state, in Business Process Server as well as in BPM Process Store workstep tables an equivalent record gets created for the mapped workstep from target process template. If such a workstep is human activity workstep, then it is reactivated, so that, if performer of the mapped workstep has been changed in target Process Template, then new workitems are created for the latest performer(s).
Inactive state — If the workstep is not activated then no records are created in Business Process Server and BPM Webflow workstep tables.

Completed state — For worksteps in completed state, for Business Process Server as well as BPM Process Store workstep tables an equivalent record gets created for the mapped workstep from the target process template.

For details, see the following topics:

- Using Business Process Portal interface
- Using the migration utility

Using Business Process Portal interface

You can migrate instances by using the Administration module of Business Process Portal.

Broad steps of the instance migration process are:

- Defining Migration Map(s)
- Defining Instance Filter(s)
- Migrating Instances

Defining an instance filter is an optional step. After defining a migration map, you may migrate instances without using the instance filter.

Defining a migration map

In order to define instance migration, you must define migration map, without this, it is not possible to migrate instances.

To define a migration map:

1. In the Administration module, click Applications > BP Server, to view the BP Server Applications page.

   This page displays all current Business Process Server applications, as shown in the Installing Business Process Server applications on page 215.

2. Click Migrate Instances to open the Migrate Instances page.

   As shown in the following figure.
3. Click Migration Map to open the Migration Map List page.

This page lists the currently defined migration maps. You can use filters to list only the maps satisfying your filter condition. You can delete one or more of the existing migration maps from this page.

Figure 84: Migration map list page

4. Click the Add Migration Map button to open the Add Migration Map page.
   a) In the General section, specify a name in the Migration Map text box.
   b) Select the source and target application from the respective drop-down lists.
   c) Click Map Worksteps tab.

   Based on the selected source application and target application, the worksteps of same name and type gets mapped automatically and they are listed in the Map worksteps tab page. On the basis of your requirement, you can edit or delete or retain them.
d) Click **Edit** to open the **Map Worksteps** page. This displays all the worksteps available for Source application and Target application.

As shown in the following figure.

**Figure 85: Map worksteps**

![Map Worksteps](image)

- To add a mapped workstep, select the source and target application workstep pairs to be included in your map and then click **Map>>**. If the selected worksteps are of the same type, then they get mapped. Click **Save** to save the mapped workstep.

- While mapping, only worksteps of same type can be mapped. If you select worksteps of different type, then you receive a message notifying that only worksteps of same type can be mapped.

  See Step **Figure 95** for more information.

- Click **Reset**, to reset the Mapped workstep list.

- Click **Cancel** to close the **Mapped Worksteps** page.

- To delete a mapped workstep, select Mapped workstep you must remove and click **<<Remove** and then click **Save**.

  You can also delete a Mapped Workstep from the Mapped Workstep tab page. Select the mapped workstep, you must delete from the list displayed and then click **Remove**.

e) Click **Map Dataslots** tab.
Based on the selected source application and target application, the dataslots of same name type gets mapped automatically and they are listed in the Map dataslots tab page. On the basis of your requirement, you can edit or delete or retain them.

**Note:** Only dataslots of same name and type are displayed, if nothing is matching, then Map Dataslots tab page will not display any mapped dataslots by default for the selected applications.

f) Click **Edit** to open the **Map Dataslots** page.

This displays all the dataslots available for Source application and Target application.

**Note:** It is possible to map dataslots, only if both the application contains dataslots of same type and size.

- To add a mapped dataslots, select the source and target application dataslots pairs to be included in your map and then click **Map>>**. If the selected dataslots are of the same type, then they get mapped. Click **Save** to save the mapped dataslot.

**Important:** While mapping, only dataslots of same type can be mapped. If you select dataslots of different type, then you receive a message notifying that only dataslots of same type can be mapped.

See **Dataslot mapping** on page 227 for more information.

- Click **Reset**, to reset the Mapped dataslots list.
- Click **Cancel** to close the **Mapped Dataslots** page.
- To delete mapped dataslots, select Mapped dataslots you need to remove and click **<<Remove** and then click **Save**.

You can also delete a Mapped dataslots from the Mapped Dataslots tab page. Select the mapped dataslots, you must delete from the list displayed and then click **Remove**.

5. Click **Save** to save the migration map definition.

## Rules and restrictions for mapping

To successfully migrate process instances, you need to define the migration maps considering the rules and restrictions applicable for the dataslot and workstep mapping.

**Dataslot mapping**

The following rules and restrictions apply to dataslot mapping:

- The default rule is that, a dataslot from the source process template can be mapped to another dataslot from the target process template only when both the dataslots are of same type (for example, INTEGER to INTEGER, CHARACTER to CHARACTER).

- An object dataslot of a source process template can be mapped to another object dataslot of the target process template only when both the object dataslots hold objects of the same java class.
Note: In migration map utility, you cannot differentiate whether the dataslot object is a
- Business object or normal object
- Date time or Date only
- String or multiline

Only major types of dataslots are displayed in the Type box.

- Dataslot size changes are supported only for CHARACTER. Migration tool allows the size changes only when target dataslot size is larger than the source dataslot size.
- In the case of DECIMAL dataslot, the source and target dataslots must be identical in Scale and precision.
- Source dataslot of type INT64 can only be mapped to target dataslot of type INT64.
- Source dataslot of type ‘Global’ can only be mapped to target dataslot of type ‘Global’.

**Workstep mapping**

The following rules and restrictions apply to workstep mapping:

- The default rule is that, a workstep from the source process template can be mapped to another workstep from the target process template only if both are of the same type (for example, Activity to Activity, Subprocess to Subprocess).
- Unmapped worksteps of the source process template are assumed to be removed from the target process template.
- Unmapped worksteps in the target process template are assumed to be newly added worksteps of the target process template.
- No new rollback points can be added in the target process template. The source and target process template should have same number of rollback points. Note that if you add or remove a workstep from the already executed path of the source process instance, then the result of a rollback in the target process instance may not be as expected.

**Defining an instance filter**

Instance filter helps to filter certain instances and migrate based on those instances.

You can define instance filters to help you list only the instances that satisfy specific condition(s). These instance filters can be created either by defining new ones or by copying an existing one. You can define instance filters from the Instance Filter List. To open this page, follow step 1 and 2 explained in the Defining a migration map on page 224, and then click the Instance Filter.
The procedures to add, copy, modify and delete instance filters are same as those followed for task filters.

**Important:** In Instance migration filter, you can select worksteps as well as dataslots for filtering. Note that, for task filters you can create only dataslot filters.

For more information about adding, modifying and deleting task filters, see Chapter 12, Setting Preferences in the *Business Process Portal User’s Guide*.  

**Note:** The current version of Business Process Server does not support filtering of suspended workstep(s).

## Migrating instances

To migrate an instance, complete the following steps:

1. In the Administration module, click **Applications > BP Server**, to view the **BP Server Applications** page.  
   - This page displays all current Business Process Server applications, as shown in the *Installing Business Process Server applications* on page 215.

2. Click **Migrate Instances** to open the **Migrate Instances** page.

3. Select the source application whose instances you want to migrate from the **Source Application** drop-down list.

4. Select the target application to which you want to migrate the selected instances from the **Target Application** drop-down list. Click **Go**.

5. Select the migration map to be used from the **Migration Map** drop-down list. Optionally, select the instance filter to be used from the **Instance Filter** drop-down list. Click **Go**.

   Business Process Portal lists all the instances satisfying the filter conditions specified in the previous and this step.
6. Select the instances that you want to migrate from the table. For more information, see Selecting and clearing rows on page 35.

7. Click Migrate. Business Process Portal migrates all the selected instances, using the specified migration map.

**Viewing migration map's execution history**

To view the execution history of a migration map, complete the following steps:

1. Perform steps 1 through 3 outlined in Defining a migration map on page 224.
2. On the Migration Map List page, in the Execution History column, click the View link for the appropriate row to open the Execution History for Migration Map window.

This window shows the details of the migration map and its usage history.
3. Click **Close this Window** to close the window and go back to the **Migration Map List** page.

### Using the migration utility

Business Process Server provides the following command line utilities to migrate process instances and undo this operation.

**instancemigration**

You can also perform instance migration by using a standalone command line utility `instancemigration.cmd/sh` from the `OEBPS_HOME\bin` directory.

**Usage:**

```
instancemigration.cmd/.sh -u <user_name> -p <password> -mapname <map_name> [-filtername <filter_name>] [-pid <process_instance_id>]
```

The following table describes these options:

**Table 59: instancemigration Utility Options**

<table>
<thead>
<tr>
<th>Option</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>-u user_name</td>
<td>The user name of the user performing instance migration.</td>
</tr>
<tr>
<td>-p password</td>
<td>Password of the user performing instance migration.</td>
</tr>
<tr>
<td>-mapname</td>
<td>Name of the map.</td>
</tr>
</tbody>
</table>
UseOption
Name of the filter.-filtername
Process instance ID of the instance to be migrated. This is an optional parameter. If you do not specify any process instance ID, then all process instances satisfying the migration map and instance filter condition are migrated.-pid

Note: The current version of Business Process Server does not support filtering of suspended workstep(s).

undoinstancemigration

You can undo instance migration and re-migrate the instances in the reverse direction, that is, from the target application to the source application using the undoinstancemigration utility. Usage:

```
undomigration.cmd/.sh -u <user_name> -p <password> -migid <migration_id> [-pid <source_process_instance_id>]
```

The following table describes these options:

Table 60: undoinstancemigration utility options

<table>
<thead>
<tr>
<th>Option</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>-u user_name</td>
<td>The user name of the user performing undo instance migration operation.</td>
</tr>
<tr>
<td>-p password</td>
<td>Password of the user performing undo instance migration operation.</td>
</tr>
<tr>
<td>-migid migration_id</td>
<td>The migration ID generated while performing the instance migration operation. You can get this ID from the pim.log file.</td>
</tr>
<tr>
<td>-pid source_process_instance_id</td>
<td>Process instance ID of the source instance that was migrated.</td>
</tr>
</tbody>
</table>
Glossary

ACL manager

In Business Process Server, Access Control List Manager provides a finer, more precise control over user access rights for resources and actions.

Activity workstep

In Business Process, the basic unit of work; must be performed by one or more human performers (valid individual user, multiple users or user group).

Adapter

A Java class that integrates remote, third party classes and actions with Business Process. An adapter can automate certain functions and tasks performed by a remote server or other external systems.

Administration

A module in Business Process Portal enabling the administrator to perform tasks such as installing/uninstalling applications, modifying configuration parameters controlling Business Process operations, and manage users, groups and access control. The Administration module is visible only to application users who have permissions to access it.

Application

In Business Process, an application is an installed, executable business process that automates a business flow.

Balanced scorecard

A management application in the Management module that measures performance by analyzing how an organization’s business activities help it achieve its strategic goals. The Balanced Scorecard provides an analysis from a range of perspectives.
**BAM**

Business Activity Management combines Business process management with strategic and analytical information on specific business performance indicators, providing real-time status information and identifying critical events to assist senior management in making informed business decisions.

**BPM Events**

A Business Process Server component that provides an open event-driven rule engine to formulate and enforce policies in business applications.

**BPM Webflow**

A Business Process Server component that enables users to develop customizable, sophisticated presentation flows for business processes, install them as Web applications, and execute them on their Web browsers.

**BPEL**

BPEL (Business Process Execution Language) for Web services is an XML-based language designed to enable task-sharing for a distributed computing or grid computing environment - including across multiple organizations - using a combination of Web services.

**BPMN**

BPMN (Business Process Modelling Notation) provides businesses with the capability of defining and understanding their internal and external business procedures through a Business Process Diagram giving organizations the ability to communicate these procedures in a standard manner.

**BP Server**

A Business Process Server component that provides a flexible, lightweight, scalable workflow process engine for intranets, extranets, and the Internet.

**Business calendar**

A Business Process Server feature that accurately calculates the Due Date of tasks, and provides support for multiple business calendars across different time zones.

**Business flow**

The logical sequence of process activities, related to one another by a triggering activity, to achieve an outcome. It represents a business process that begins with a commitment and ends with the termination of that commitment. In Business Process Server, business flow includes Workflow (the flow of all human-performed activities), integration flow (the flow of activities performed by systems) and presentation flow (from a user’s viewpoint, the flow of data from one Web page to the next).

**Business logic**

The control flow and information flow among worksteps that define a business process.

**Business object**

A representation of an activity in the business domain, including its name, definition, attributes, behavior, relationships and constraints.

**Business process**

A process involving multiple worksteps in the form of operations, interactions and notifications performed by a user, group of users, an external adapter, or a script.
Business Process Server application

An application is an implementation of a business process. It can contain one or more process templates, performers, adapters, customized forms or rules. An application can be published, installed and run on BP Servers. In Business Process Server, an application is an installed, executable business process that automates a Workflow.

Business Process Server Web services

A Business Process Server component that allows application developers to; a) publish their applications as Web services, and b) find and convert other available Web services on the Internet into Business Process Server applications.

Business Process Portal

A Business Process Server component that offers users, managers, administrators and developers a unified, customizable portal for single sign-on access to all Business Process Server functionalities to which they are granted permission.

Business process management

The concept of guiding work activities through a multi-step business process in order to improve performance and reduce costs within and across functional business units.

Business Process Modeler

A stand-alone component that enables users to design templates for basic business processes.

Business rule

A combination of elements, including validation edits, logon verifications, database lookups, policies and transformations, that represent an enterprise’s way of doing business.

Control flow

The sequences of worksteps and workstep conditions, as defined in a process template in Progress Developer Studio for OpenEdge or Business Process Modeler.

Dashboard

A Business Process Server feature that provides a graphic overview of the status of several business processes on a single Web page, enabling users to monitor the progress of each process. Users can view business processes across all applications or for a selected application.

Dataslot

A data placeholder that persists through the entire process and defines the information flow of the business process. Dataslots are associated with processes, where they can add information into (Input type) or out of (Output type) worksteps, and appear as editable or read-only fields on a user's interface.

Expression editor

A Business Process Server tool that enables users to define complex conditional expressions within a Decision gateway to support their business requirements.

Group

In Business Process Server, an entity that has as members valid users or other groups who perform related work and have authorized access to specific components.
<table>
<thead>
<tr>
<th><strong>Glossary</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Heatmap</strong></td>
</tr>
<tr>
<td>A Business Process Server feature that provides a convenient, graphical tool for managers to visually locate the bottlenecks in the process execution. It helps managers to get an overview of the status of the currently active instances, identify suspended instances, and analyze the history of the completed instances.</td>
</tr>
<tr>
<td><strong>Home</strong></td>
</tr>
<tr>
<td>A module in Business Process Portal through which users interact with Business Process Server. Using the Home module, users complete entries to various tasks and applications, update profile, set preferences, and link to the support infrastructure required to achieve these tasks. The Home module is the primary interface for application users.</td>
</tr>
<tr>
<td><strong>Infopad</strong></td>
</tr>
<tr>
<td>In Business Process Server, a data structure used to capture business metrics, typically displayed as a table with one or two dimensions.</td>
</tr>
<tr>
<td><strong>Instance</strong></td>
</tr>
<tr>
<td>An individual object within a specific class. In Business Process Server, a self-contained unit that is created each time you use a process template to run a Business Process Server application.</td>
</tr>
<tr>
<td><strong>KPI</strong></td>
</tr>
<tr>
<td>Key Performance Indicator, used in the Balanced Scorecard system, that provides the data translating enterprise goals into a set of measurable objectives.</td>
</tr>
<tr>
<td><strong>Managed Adapter</strong></td>
</tr>
<tr>
<td>In Business Process Server, a Managed Adapter is an implementation of an adapter interface that facilitates data exchange between Business Process Server processes and external applications.</td>
</tr>
<tr>
<td><strong>Management</strong></td>
</tr>
<tr>
<td>A module in Business Process Portal enabling the managers to query, report, and control processes and resources for application users. The Management module is visible only to application users who have permissions to access it.</td>
</tr>
<tr>
<td><strong>Migration</strong></td>
</tr>
<tr>
<td>The process of moving from the use of one operating environment to another operating environment that is typically seen as improvement. Migration can involve moving to new hardware, new software, or both. It may involve a new application, another type of database, or a redesigned network. Migration is also used to refer simply to the process of moving data from one storage device to another. Business Process Server supports data migration as well as application migration.</td>
</tr>
<tr>
<td><strong>Performer</strong></td>
</tr>
<tr>
<td>An entity that executes a workstep. Depending on the workstep type, the performer can be a human user, a group of users, an adapter or other external performer, or a script.</td>
</tr>
<tr>
<td><strong>Presentation flow</strong></td>
</tr>
<tr>
<td>The flow of information and user input from one interface to the next. Typically related to a single Activity workstep in the process and generated in a BPM Webflow environment.</td>
</tr>
<tr>
<td><strong>Process engine</strong></td>
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<tr>
<td>Orchestrates the execution of business processes and also coordinates conversations among process engines based on public processes, which forms the backbone of global business collaboration.</td>
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Process refresh

A Business Process Server feature for replacing the installed process without versioning, facilitating the running process instances to refresh and seamlessly adapt to the new Workflow.

Process template

In Business Process Server, a model of business flow that includes worksteps, connectors and dataslots. After users publish and install it as an application in Business Process Server folder structure, they can use the application to create process instances.

Progress Developer Studio for OpenEdge

An Integrated Development Environment for Business Process Server that enables application users to develop and publish a Business Process Server application without leaving the development environment.

Role

The actions and activities assigned to a valid application user who is a member of a group. In Business Process Server, only members of a group can be assigned a role. A role indicates the relationships of the user in a group context.

Rollback

In Business Process Server, a feature that restarts the Workflow from a workstep previously selected as the rollback point in the process, performed automatically in the event of a failure.

Rule wizard

An interactive utility that enables application users to quickly develop rules that can be applied to a business process.

Swim lanes

Used in Workflow diagrams to organize complex processes across functional boundaries. For example, seen as horizontal lines on a process map, swim lanes can be used to place individual task steps into different categories that depend on task ownership.

Task

In Business Process Server, a performer is assigned one or more work items that the performer sees as tasks. There are two types of tasks: Assigned, which are assigned specifically to you; and Available, which are available to be performed by you or other members of your user group.

User

In Business Process Server, a valid human performer with authorized access to specific modules.

Workflow

The logical sequence of activities performed by human performers. Workflow includes the tasks, procedural steps, organizations or people involved, required input and output information, and tools needed for each activity in a business process.