iGrafx® 2015

Process Automation Administrator Guide

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Revision: Dec. 2014

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Logging In

The Process Automation Login dialog box (see Figure 1 below) requires three values that you must specify:

- **Login** – There are three ways to enter the login credentials; see Types of Registration on the next page.
- **Password** – Your assigned password.
- **Client** – Specifies which of the various clients you wish to log in to. The set of clients available to you depends on your specific user permissions.

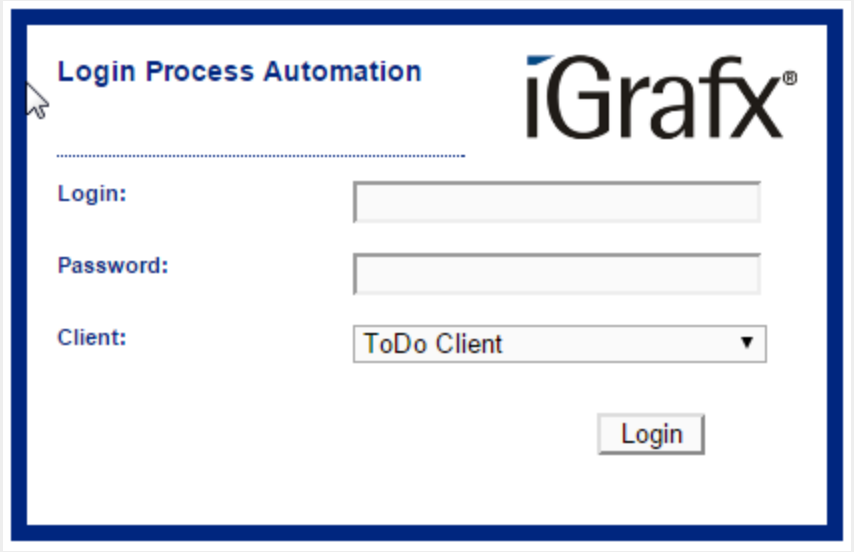

Figure 1. iGrafx Process Automation Login dialog box

Options available in the Client drop-down list include the following:

- ToDo Client
- ToDo Client 1G
- Process Manager Client
- Process Manager Client 4G
- Process Monitoring Client
- Administration

Types of Registration

There are three ways to log in to iGrafx Process Automation. Not all may be supported by your organization's implementation.

When you have supplied the required values, click the **Login** button. The Process Automation dashboard, at the URL http://*your_internal_server/* opens in your browser.

Log in with client and user name

You can also log in with your iGrafx Process Automation username and a client prefix. This way, iGrafx Process Automation knows which client you want to log in to. The client and username must be specified as follows:

client/name

The *name* value must be the one specified in your client profile by your organization's iGrafx Process Automation administrator.

Log in with username

If you log in using just your username and password, you'll be logged in to the iGrafx Process Automation client that is specified as the default client in the tim.properties file in the JBoss directory.

Log in with your email address

Each user can be registered with the email address in their user profile when the associated password is correct.

> **Note:** The email address specified for you in iGrafx Process Automation must be your system-wide email address.

Administration Client

iGrafx Process Automation includes five different web clients that you can log in to:

- ToDo Client
- ToDo Client 1G
- Process Manager Client 4G
- Process Manager Client (2G)
- Process Monitoring Client
- Administration

Note: The ToDo clients are described in the *iGrafx® 2015 Process Automation User Guide*.

The Process Manager and Process Monitor clients are described in the *iGrafx® 2015 Process Automation Manager Guide*.

Your permissions settings determine your access to the individual clients.

Any user who wants to log in to the Administration Client needs the appropriate Administrator permissions and login credentials.

The Administration client is designed to maintain administrative affairs of the software. The administrator has broad rights, like, for example, the administration of users within a company. In addition, settings specifically for a process definition can be made.

Overview

The Administration client is a simple client for managing users, roles, job schedules and emails generated from iGrafx Process Automation.

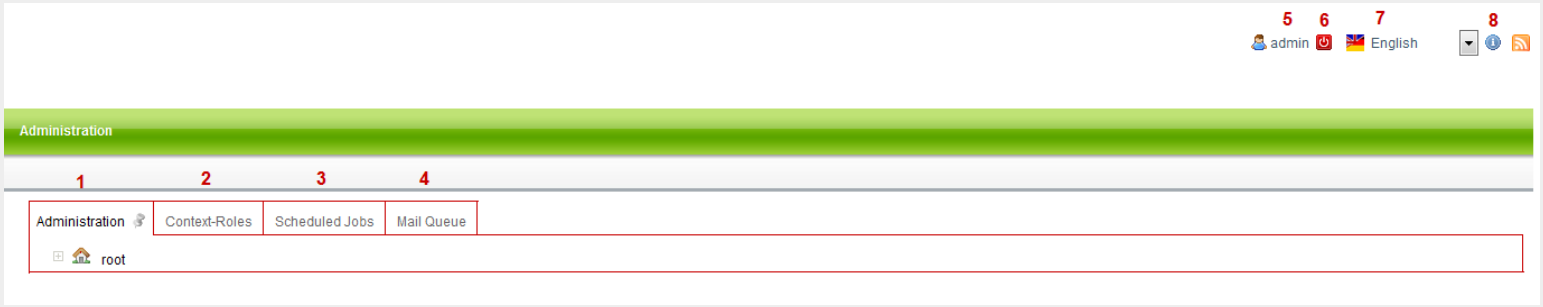

Figure 2. Administration client

Element	Description
1	Settings specific to administrative affairs are made from the resource tree in the Administration tab.
2	The available context roles are listed and can be modified from the Context roles tab.
3	Timers for each process can be started, stopped, or archived from the Scheduled jobs tab.
4	The Mail queue lists all emails sent from the system, and can be sent manually or via the sendAllDelayedEmails funtion.
5	Click here to modify your own user profile.
6	Log out of the current client session by clicking this icon.
7	Select the desired language from this drop-down list.
8	Click here to view the current version and revision of the software.This information is important if you are seeking support for software issues.

Administration

The Administration tab displays available resource definitions in a tree structure. The top level, "root," is where you can compile a new client. The subsequent levels are created from the client profiles.

When the tree is expanded, Calendar Profiles, Groups, and Users levels are visible.

- The Calendar Profile object shows the holidays defined in the system. You can add and delete holidays by right-clicking on the Calendar Profile object.
- The Groups object is parent to a set of groups that are comprised of the users assigned to those groups.
- The Users object is parent to individual users who have been defined in the system and for a specific client profile.

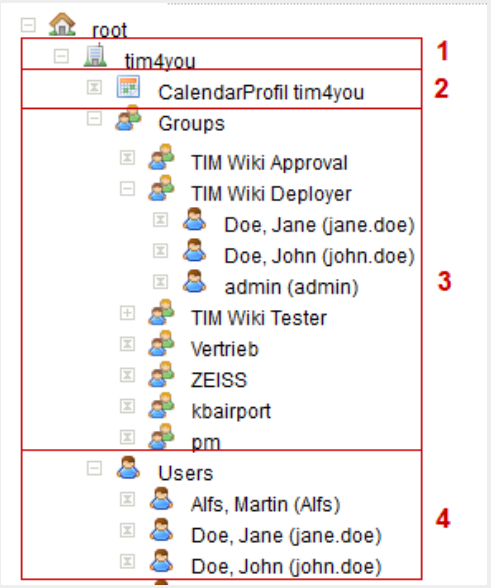

Figure 3. Management

Element	Description
1	The name of the client profile (e.g. "igrafx"). Right-click this object to access the client properties.
2	The calendar profile lists holidays defined in iGrafx Process Automation. Right-click this object to add a holiday. Right-click an existing holiday to delete it.
3	The Groups object contains all defined groups. Right-click the Groups object to add a group. Click any existing group to view or change its properties. Right-click a group member to remove them from the group.
4	The Users object contains the users defined in the system. Right-click the Users object to either add a user or jump directly to the Context roles tab. Click on a user object to access or modify their user profile. Right-clicking a user object results in a context menu where you can access their user profile, remove the user, Add a context role for the user, or jump to the context roles tab.

Context Roles

The Context roles tab maps users to their roles in the context of either process instances or process definitions.

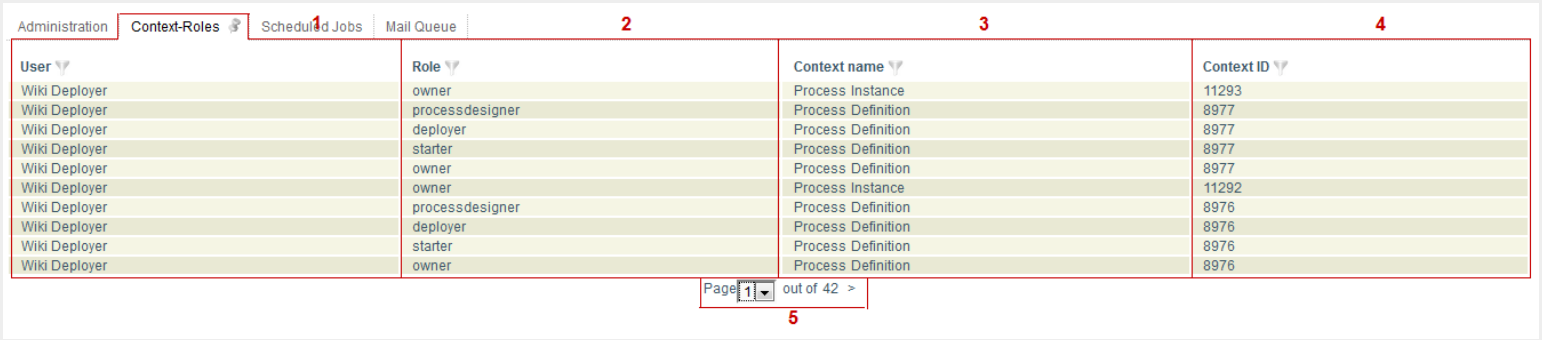

Figure 4. Context roles

A click on a context role of this list will open a window where the roles can be adapted.

Element	Description
1	The name of the user for whom this context role is defined.
2	The user's role.
3	The context of the role (process definition, process instance, or process definition template).
4	A unique number indicating the specific definition/instance in which the role is valid. This depends on the value in the Context name column.
5	Lets you view other pages of context role definitions.

Scheduled Jobs

All regularly-executed functions that process time-controlled tasks are called timers.

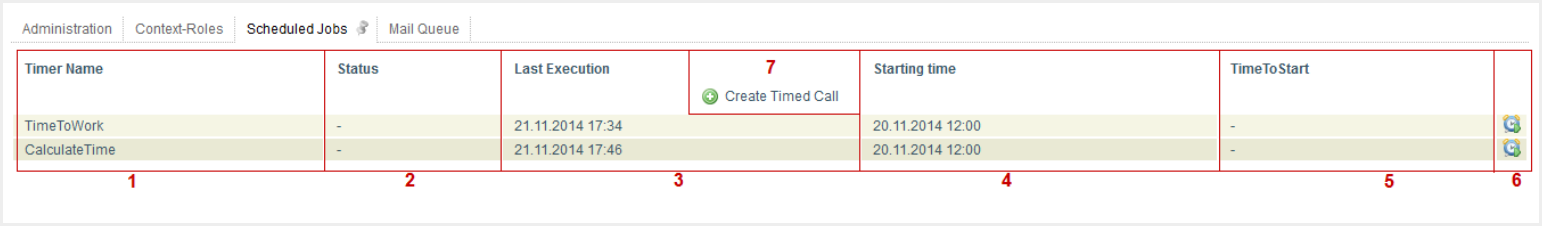

Figure 5. Scheduled jobs

Timers can be started/stopped, or archived via a right-click.

Element	Description
1	The name assigned to the timer.
2	Any potential errors that occurred during the execution of the timer.
3	The time of the timer's last execution.
4	The time of the timer's first execution.
5	The remaining time until the start of the timer.
6	An icon indicating whether the timer is currently started or stopped. If a little green arrow appears at the bottom right of the icon, the timer has started and is currently running. If this arrow is not present, the timer is stopped. Click this symbol to start or stop the timer.
7	Click this icon to can create a new timer.

Mail Queue

The Mail queue tab lets you administer email sent from iGrafx Process Automation.

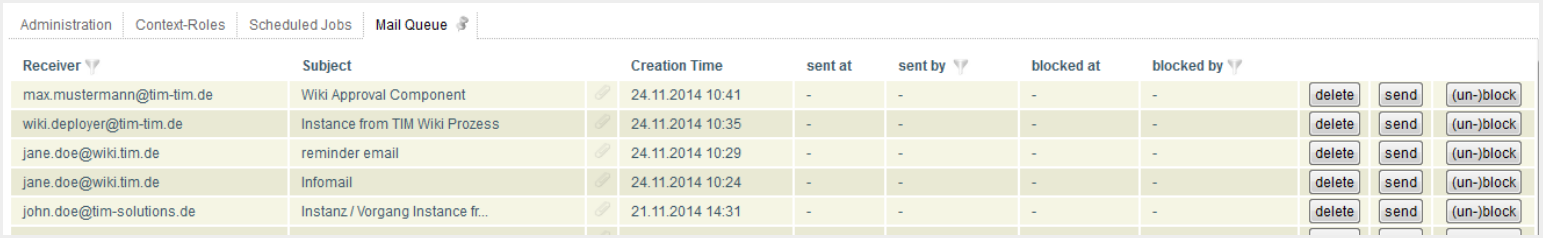

Figure 6. Mail queue

Column	Description
Receiver	The recipient of the email.
Subject	The subject of the email.
Attachments	Any attachments are indicated in this column by a paper-clip icon.
sent at	If the email was sent from the queue, the date and time it was sent appears in this column.
sent by	If the email was sent from this queue, the user who sent it appears in this column.
blocked at	Emails in this queue can be blocked. The sendAllDelayedEmails timer ignores these emails and does not send them. This column shows you when the email was blocked.
blocked by	This column shows which user bocked the associated email.
delete	Click this button to delete the corresponding email
send	Click this button to send the corresponding email, manually, without using the sendAllDelayedEmails timer.
(un-)block	Click this button to block or unblock the corresponding email from being sent.

Global Mail Queue Commands

Across the bottom of the Mail queue list, there is a line of five buttons that perform actions on the entire mail queue.

- **Send all emails** – Sends all emails in the queue.
- **Resend all failed emails** – Attempts to resend all failed emails in the queue.
- **Remove all failed emails** – Deletes all failed emails from the queue.
- **Remove all blocked emails** – Deletes all blocked emails from the queue.
- **"all sent emails older than *N* days" delete** – Deletes all emails in the queue that are older than the number of days selected in the corresponding drop-down list. Possible values are 2, 5, 10, 20, 40, or 65 days.