SeeBeyond ICAN Suite

eInsight Business Process Manager User's Guide

Release 5.0.3

SEEBEYOND®

Task Assignment   95

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Chapter 1

</div>

Introduction

The *eInsight Business Process Manager User's Guide* provides instructions and background information for all users of the SeeBeyond Technology Corporation™ (SeeBeyond™) eInsight Business Process Manager™ (eInsight) application. This chapter introduces you to this guide, its general purpose and scope, and its organization. It also provides sources of related documentation and information.

In this chapter

- **Overview** on page 14
- **Contents of This Guide** on page 15
- **Writing Conventions** on page 16
- **Supporting Documents** on page 16

1.1 Overview

This guide explains how to use eInsight. This user's guide includes information on the following topics:

- Installing eInsight.
- Working with modeling elements and the Business Process Designer.
- Creating and configuring business process models.
- Setting up the eInsight database for Persistence and Monitoring.
- Creating and running the sample project.
- Using Task Assignment with the User Activity and Work List Manager.
- Upgrading eInsight.

1.2 Intended Audience

This guide is intended for experienced PC users who have the responsibility of helping to set up and maintain a fully functioning ICAN Suite system. This person must also understand any operating systems on which eInsight will be installed (Windows or UNIX) and must be thoroughly familiar with Windows-style GUI operations.

1.3   Contents of This Guide

This document includes the following information:

- **Chapter 1, "Introduction"** provides an overview of this document's purpose, contents, writing conventions, and supported documents.

- **Chapter 2**, **"Introduction to eInsight and the SeeBeyond Integrated Composite Application Network Suite"** describes SeeBeyond's product suite and how it works with eInsight.

- **Chapter 3**, **"Installation"** guides you through the installation of eInsight.

- **Chapter 4**, **"Designing Business Process Models"** describes business process elements and procedures related to building a business process model.

- **Chapter 5**, **"Configuring Business Process Models"** discusses configurations and options.

- **Chapter 6**, **"Exception Handling"** explains the concept of exception handling and how to configure various methods of handling errors.

- **Chapter 7**, **"Deploy Business Process Models"** discusses deployment of the business process model.

- **Chapter 8**, **"Persistence and Monitoring"** describes these features and how to set up the required database instances.

- **Chapter 9**, **"Implementation"** gives a step-by-step example of a simple implementation.

- **Chapter 10**, **"Task Assignment"** gives a step-by-step example of a Task Assignment implementation.

- **Chapter 11**, **"Upgrading eInsight Business Process Manager"** gives an overview of the upgrade procedure for previous versions of eInsight.

- **Appendix A**, **"Method Palette"** describes the methods available from the Business Rules Designer.

- The **"Glossary"** defines eInsight specific terms.

- **"Index"**

1.4   Writing Conventions

The following writing conventions are observed throughout this document.

Table 1   Writing Conventions

Text	Convention	Example
Button, file, icon, parameter, variable, method, menu, and object names.	**Bold** text	▪ Click **OK** to save and close. ▪ From the **File** menu, select **Exit**. ▪ Select the **logicalhost.exe** file. ▪ Enter the **timeout** value. ▪ Use the **getClassName()** method. ▪ Configure the **Inbound** File eWay.
Command line arguments and code samples	`Fixed` font. Variables are shown in ***bold italic***.	`bootstrap -p `***`password`***
Hypertext links	**Blue** text	For more information, see **"Writing Conventions" on page 16**.

Additional Conventions

Windows Systems

For the purposes of this guide, references to "Windows" will apply to Microsoft Windows Server 2003, Windows XP, and Windows 2000.

Path Name Separator

This guide uses the backslash ("\") as the separator within path names. If you are working on a UNIXsystem, please make the appropriate substitutions.

1.5   Supporting Documents

The following SeeBeyond documents provide additional information about the SeeBeyond Integrated Composite Application Network Suite:

- *SeeBeyond Integrated Composite Application Network Suite Primer*
- *eGate Integrator Installation Guide*
- *eGate Integrator User's Guide*

<div align="right">**Chapter 2**</div>

Introduction to eInsight and the SeeBeyond Integrated Composite Application Network Suite

This chapter provides an overview of the SeeBeyond Integrated Composite Application Network (ICAN) Suite and explains how eInsight interacts with the other suite components.

2.1   The SeeBeyond ICAN Suite

SeeBeyond delivers the ICAN Suite, which allows companies to rapidly assemble enterprise scale, end-user applications built on existing systems and infrastructure. ICAN is an application-level network that unifies connectivity among people, application systems and devices in different locations and across organizations.

The notion of business services facilitates the implementation of extended applications. Service-oriented architectures clarify design and enable reuse by sharing logic and data among different client systems and users.

2.2   eInsight and the ICAN Suite

eInsight Business Process Manager (eInsight) is part of the SeeBeyond ICAN Suite of products. eInsight delivers business process management features and functions to the ICAN Suite.

Business process management is a strategic orchestration of the movement of information and the flow of complex processes between participants (systems, users, and organizations) to accomplish larger business objectives.

2.2.1 ICAN Integration

eInsight is tightly integrated with the ICAN Suite and runs as a component within the ICAN Suite environment. Figure 1 illustrates some of the eInsight and ICAN components that work together.

Figure 1   eInsight and the ICAN Suite
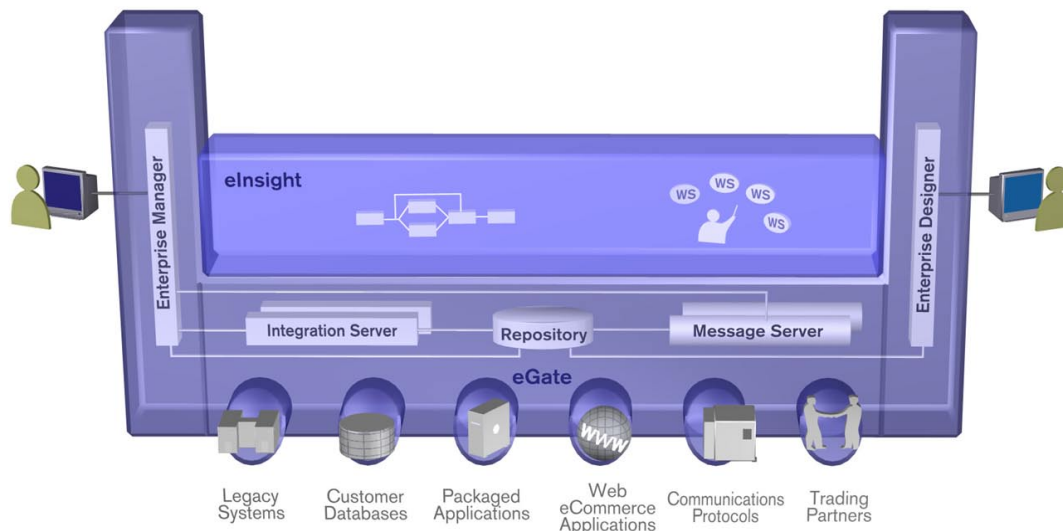
- The Business Process Designer runs as a component within the **Enterprise Designer**.
- Business process definitions, components and deployment profiles are stored in the **SeeBeyond Repository**.
- The eInsight Engine, which coordinates all business process related activity of a deployed project, runs within the **SeeBeyond Integration Server.**
- Web-based business process monitoring is available throught the **Enterprise Manager**, which provides an interface to access current instance data.

2.2.2 ICAN Suite Services

The ICAN Suite has a wide range of functions that it shares with all of the ICAN Suite products. eInsight is able to leverage many platform level services, such as:

- **Resource Management** - The ICAN Suite uses a distributed and open architecture that enables components to access system resources (memory and processing power) as needed and in conjunction with other components.
- **Security** - The ICAN Suite provides a security module to fulfill security needs such as authentication and authorization access to eInsight functions.
- **Repository storage and access** - The setup, component, and configuration information for the elements of a Project, including business process and related components, are stored in the Repository.

- **Deployment abilities** - The ICAN Suite provides deployment profiles that contain the information necessary to activate eInsight Project business processes and associated components. When a deployment profile is activated, eInsight's active business processes are made available as Web Services.

- **Monitoring** - The Enterprise Manager lends web-based monitoring abilities to eInsight, allowing you to observe and correct business process activity.

- **Connectivity Mapping** - The Connectivity Map maintains the relationships between eInsight and other system components. The Connectivity Map specifies the topology of services that will be invoked, by:

  - Identifying the order and nature that services are invoked.

  - Depicting relationships between the components, including the publish/subscribe information for data routing.

  - Defining the partners fulfilling the services that are invoked.

- **Version Control** - This feature maintains a history of business process versions, through a check-in and check-out process.

- **Impact Analysis** - Impact Analysis allows you to view how changes to one component or business process will impact other components or business processes of a Project or all Projects in the Repository.

- **Import and Export of Business Process Models** - The ability to import and export business process models makes it possible to recreate the processes on other systems or to reuse processes that may be similar in other areas.

2.3 eInsight Overview

eInsight provides you with a clear view into the internal and external processes of an organization. These processes may be executed by computer systems or employees.

2.3.1 eInsight Architecture

eInsight speeds the design and deployment of business processes by providing an open process modeling environment using BPMN (Business Process Modeling Notation) for the graphical notation of a business process and by automatically generating the WSBPEL code needed to implement the business process across all of the participating Web services (for example, for applications and business partners).

You drag and drop components into the process model and then specify the additional flow control and business rules that manage what services get called at what time. eInsight supports importing and exporting WSBPEL to share processes with third party tools.

The technologies that carry out eInsight's functions are entirely based on industry standards. In Figure 2, you can see how the different components interact.

Figure 2 eInsight Architecture
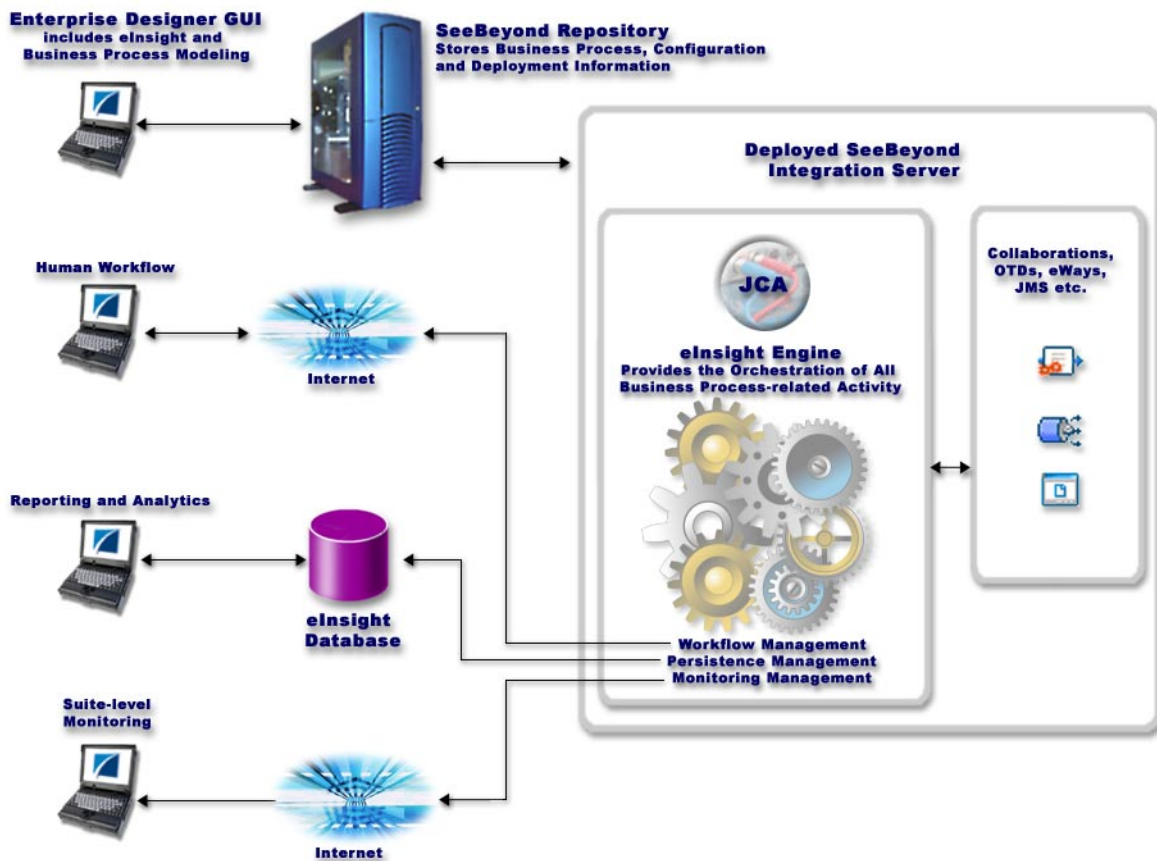
eInsight's architecture uses the following standards:

- Business Process Modeling Notation (**BPMN**), from the Business Process Management Initiative (BPMI) standards body, provides a standard graphical view for Business Process Execution Language for Web Services (**WSBPEL**).

- Web Services Business Process Execution Language (**WSBPEL**) is the underlying code generated when creating a business process.

- Web Services Description Language (**WSDL**) is an XML-based language used to define Web services and describe how to access them. All eInsight business processes are automatically described using generated WSDL.

- J2EE Connector Architecture (**JCA**) provides a mechanism to access external applications and data. The JCA engine is implemented as a standard JCA 1.5 module that plugs into the SeeBeyond Integration Server.

2.4   Process Overview

There are two phases of business process management. The first phase, *design*, is described in the **"Design Phase Overview"**. The design phase begins before you start using eInsight and ends once the business process is deployed.

The second phase is called *runtime*, which is discussed in the section **"Runtime Phase Overview"**. Runtime refers to the tasks that you perform after the business process is deployed.

Figure 2 illustrates the eInsight and ICAN components that work together to provide integration services.

2.4.1   Business Process Modeling and Design

You can use eInsight to streamline operations by creating business logic that helps you reach outward to include customers and trading partners. Using eInsight to implement business process management removes inefficiencies by orchestrating a unified work flow. This flow can include multiple systems/users, therefore extending to customers.

The eInsight graphical user interface (GUI), shown in Figure 3, allows you to model the business processes that your department or even your entire company performs on a regular basis. The tools provided allow for various scenarios and events that may take place in your process.

2.4.2   Business Process Designer

The Business Process Designer serves as the front-end design tool used to create a visualization of your business workflow and increase understanding of the business processes involved. As the business user, you are able to integrate logic into the business process. When used with eInsight, the Enterprise Designer includes the following areas, as shown in Figure 3.

Figure 3   eInsight Business Process Designer
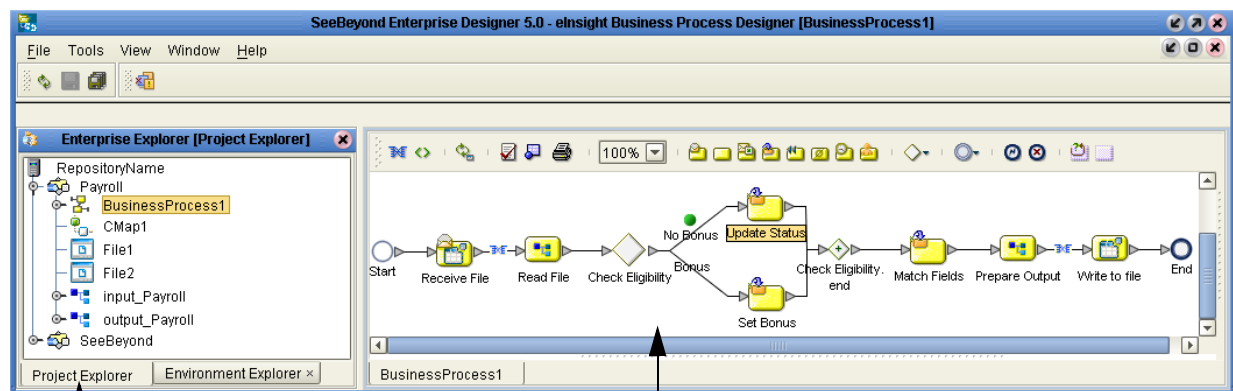
Project Explorer

Business Process Designer

- **Project Explorer** - Displays a hierarchical representation of all the business process models and related ICAN components. This view shows what is currently displayed on the modeling canvas.

- **Business Process Designer** - Used to graphically create the business process model in the form of an activity diagram.

2.4.3 Design Phase Overview

The basic steps that you will perform to design a business process model are as follows:

1 Plan and design a model that represents a business process taking place in your company.

2 Set up a Project and related components necessary to your business process model.

3 Create the new business process model in the Business Process Designer, using activities, links, decision and exception handling logic, and any other modeling elements that express the actual business process.

4 Validate, generate and save the business process code to the SeeBeyond Repository server, where business processes configuration and deployment information is stored.

5 Create a Connectivity Map to configure the relationship between your ICAN Suite components.

6 Select or create an Environment where your business process will run.

7 Select or create a Deployment Profile and activate it to complete the deployment process. The eInsight Engine is now deployed to the Integration Server.

Advanced design phase tasks

There are other tasks you may need to do in the design phase, based upon your configuration, such as:

- Create human workflow tasks using an eVision interface and User Activity element. These custom web pages can be configured to interact with business processes, track and view system exceptions, or employee assignments. Human workflow is the actual tasks and assignments that a person performs.

  - eInsight supports the different ways an organization defines their company structure. You may define expression-based task assignment to users, groups and/or roles.

- Configure and maintain persistence and recoverability functions. The instance data is stored in a database that you configured in the design phase. The eInsight Engine writes to this table at runtime.

2.4.4 Runtime Phase Overview

Once all of the design phase tasks are complete and the system is running, you can monitor and manage business process activity and the overall Project with the Enterprise Manager.

eInsight Engine

The eInsight engine provides process coordination that enables the execution of business processes, activities and tasks. During the runtime phase, the eInsight engine:

- Receives messages that instantiate business process instances.

- Writes monitoring, persistence and recoverability data to a database.

See **Figure 2 on page 20** for a detailed view of the eInsight architecture.

eInsight Database

eInsight components connect to the eInsight database to provide:

- **Persistence** - The eInsight Engine writes instance data to a database table to ensure that data is able to persist in the system.

- **Recoverability** - Using the eInsight database allows you to recover data from the last state of consistency.

- **Monitoring** - Instance data is written to database tables and then read by the Enterprise Manager to provide current and historical system information.

2.4.5 Business Process Monitoring and Management

Business Process Monitoring and Management are available from the Enterprise Manager. This interface allows you to monitor and fix some problems that occur while the business process is running.

Figure 4   Business Process Monitor
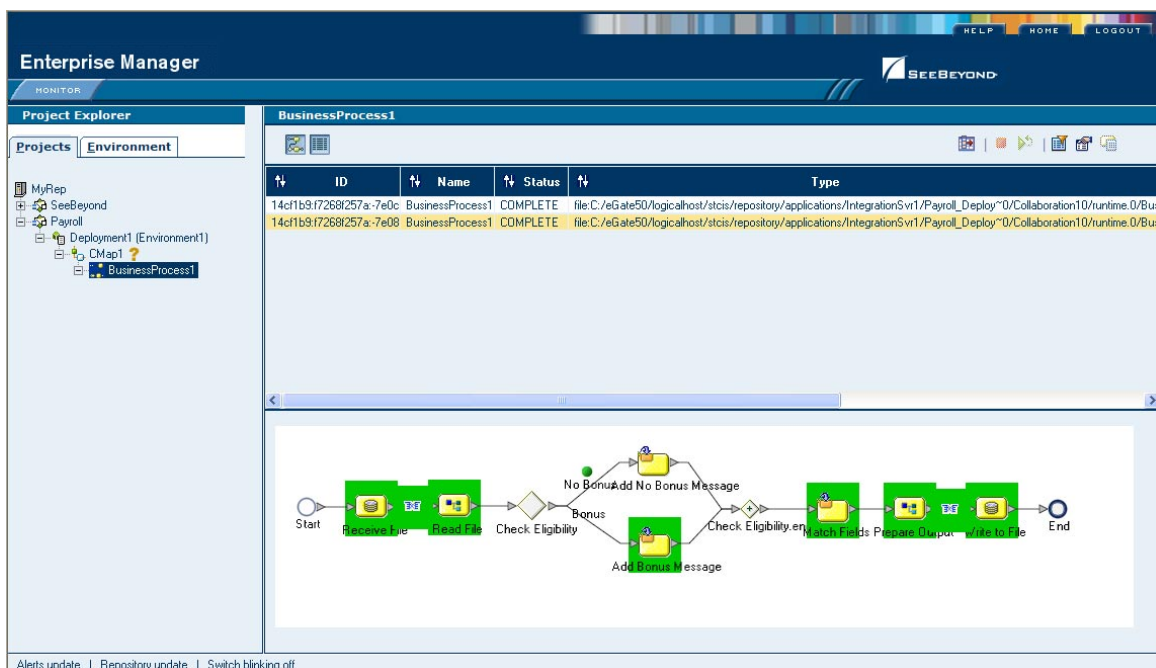
The actions that you can perform on a business process from the Enterprise Manager are called *Business Process Management* tasks. Some actions that you can take from the Enterprise Manager include:

- Start, stop, restart, and pause eInsight components.
- View and identify errors originating from erroneous data.

You can ensure that processes continue to run and work properly with these powerful monitoring tools.

2.5 Summary of Features

eInsight provides your business with a powerful assortment of features:

- Maximizes business process efficiency by enabling business process owners to directly model, monitor, manage, analyze and optimize business processes using an easy-to-use, drag and drop graphical user interface.

- Manages long-lived business processes and ensure process integrity, including the ability to compensate for failed processing steps.

- Abstracts the complexities of the technical integration using open standards (BPMN) for the graphical notation of a business process elevating the business logic into the process layer to ensure a flexible, business process-driven implementation.

- Automates web services orchestration implementing WSBPEL to assemble Web services into larger composite application processes.

- Automatically provides all the interoperability benefits of Web services standards without requiring developers to learn SOAP, WSDL, UDDI and WSBPEL.

- Guarantees process integrity and eliminates processing errors by ensuring every step in the business process either completes successfully with full traceability and auditability or is handled by robust workflow and exception handling functionality.

- Accelerates decision making and human involvement through robust workflow support including support for custom tasks task assignment, user roles, and organizational hierarchies.

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Chapter 3

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Installation

This chapter discusses the steps to install eInsight. For upgrade information, see **"Upgrading eInsight Business Process Manager" on page 125**.

3.1 Installation Overview

After uploading ICAN Suite product files to the Repository (see *eGate Integrator Installation Guide*), you can download eInsight from the Repository and install it on a local Windows client.

3.1.1 System Requirements

The **Readme.txt** file (located on the CD-ROM) contains the most up-to-date operating system requirements for the supported platforms.

eInsight is available on the following operating systems:

- Windows Server 2003, Windows XP SP1a, and Windows 2000 SP3 and SP4
- HP Tru64 V5.1A with required patches
- HP-UX 11.0, 11i (PA-RISC), and 11i v2.0 (11.23) with required patches and parameter changes
- IBM AIX 5.1L and 5.2 with required Maintenance level patches
- Red Hat Enterprise Linux AS 2.1 (Intel Version)
- Red Hat Linux 8 (Intel Version)
- Sun Solaris 8 and 9 with required patches

Please see the *SeeBeyond ICAN Suite Installation Guide* for ICAN Suite system requirements.

Database Support

The database installation is optional. The eInsight database is used to provide a runtime persistent store for recovery as well as a schema used for reporting and monitoring purposes.

eInsight supports the following databases:

- Oracle 8.1.7, 9.0.1 and 9.2

- Sybase 12.5

- MS SQL Server 2000

3.1.2 Installing eInsight

eInsight must be installed on a Windows computer that is running the Enterprise Designer. For more information about installation, see the *SeeBeyond ICAN Suite Installation Guide*.

Note: *You may see different files in the products list, depending on what SeeBeyond products you have purchased. See the SeeBeyond ICAN Suite Installation Guide for details about uploading products to the SeeBeyond Repository.*

Install eInsight

The eInsight installation is similar to other ICAN Suite product installations. You can find general product installation instructions in the *SeeBeyond ICAN Suite Installation Guide*.

1 Login to the **Enterprise Manager** and click **Browse** to find the **eInsight.sar** file.

2 Click **Browse** to find the **eInsight.sar** file.

3 Select the **eInsight.sar** file from the Products directory of your CD, and click **Open**.

4 From the **Enterprise Manager**, select **Upload Now**.

5 Once the upload is complete, launch the Enterprise Designer and click on the **Tools** menu. Select the **Update Center** to update the eInsight components, as shown in Figure 5.

Figure 5 Update eInsight
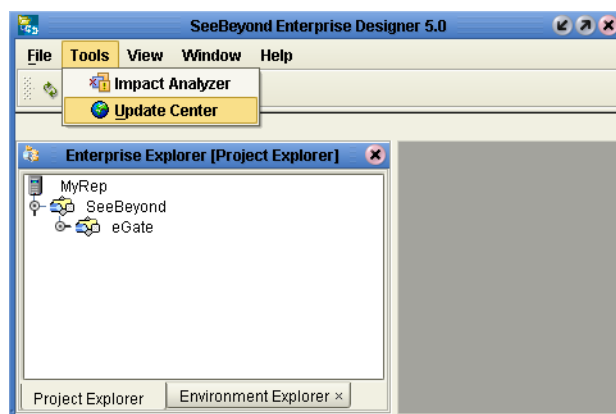
6 The Update Center appears with a list of components that are ready to update. Select the eInsight modules and click the arrow to move the modules to the **Include in Install** section.

Figure 6   Select Modules
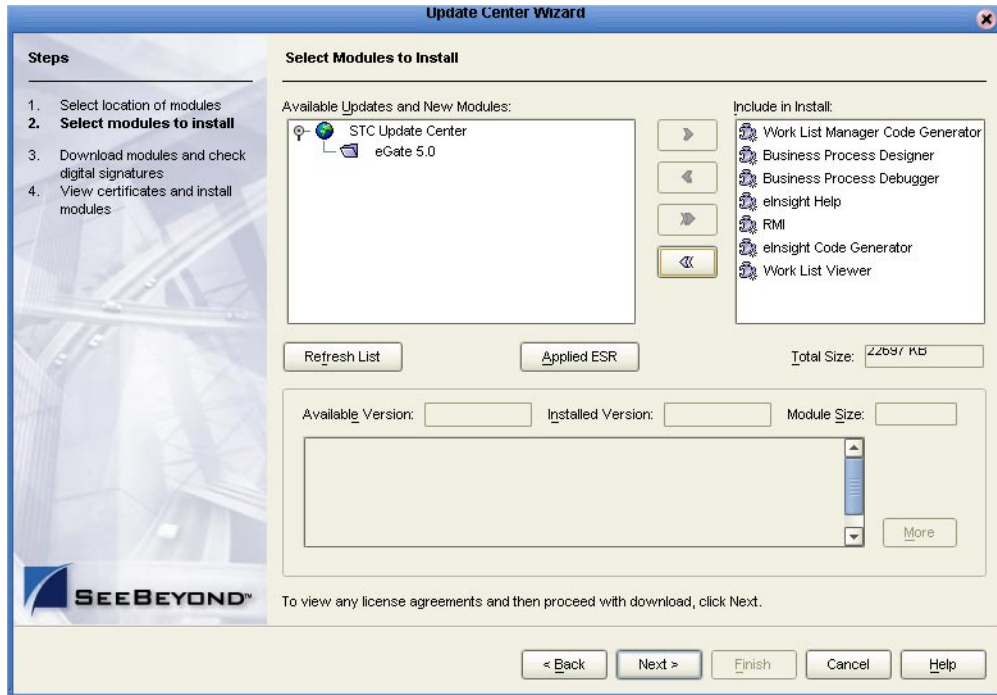
7   Click **Next** to advance to the next step.

   The **View Certificates and Install Modules** dialog appears.

Figure 7   View Certificates and Install Modules
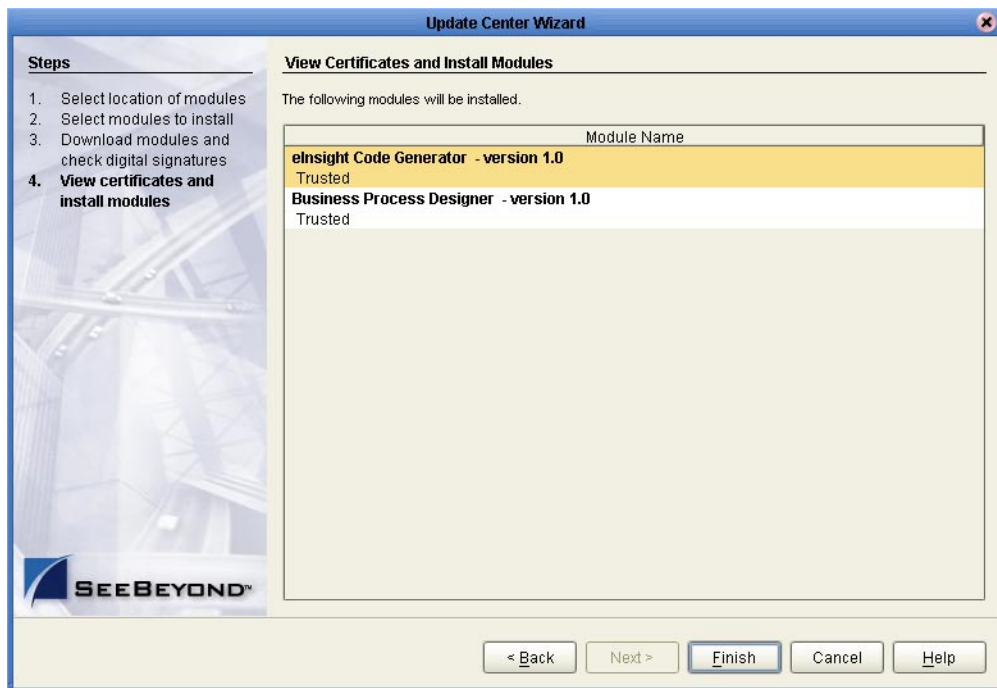
8   Click **Finish** to complete the installation and update process.

At this point, you are prompted the restart the Enterprise Designer. Your installation of eInsight is complete once the Enterprise Designer restarts.

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Chapter 4

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Designing Business Process Models

You can use eInsight to configure the components depicted by each activity in your business process models. This chapter provides the background information you need to create and understand business process models.

4.1 Overview

Topics in this chapter are:

- **"Building a Business Process Model" on page 29**
- **"Using the Business Process Designer" on page 31**
- **"Modeling Elements" on page 32**

4.2 Building a Business Process Model

A *business process* is a collection of actions that take place in your company, revolving around a specific business practice. These processes can involve a variety of participants and may include internal and external computer systems or employees. In eInsight, you create a graphical representation of the business process called a *business process model*.

A business process modeled in eInsight may look something like Figure 8.

Figure 8   Sample Business Process Model
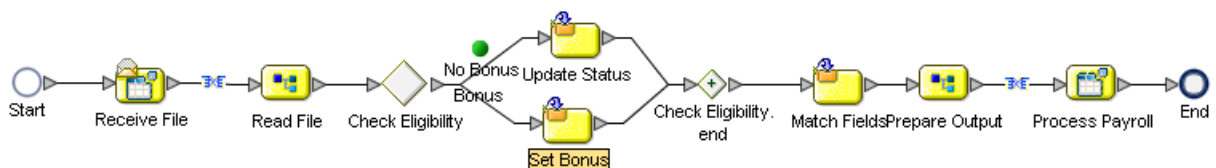
Add a Business Process to your Project

Adding a business process to your Project provides an empty modeling canvas for you to work with and allows you to name the business process. Before you create a model of your business process, you must add a new business process to your project.

1   From the Enterprise Explorer pane, right-click on a **Project**.

2   Select **New** and **Business Process** from the context menu.

3   Enter a new name for your business process.

Note: *See the eGate Integrator User's Guide for more information about creating a new Project.*

4.2.1 Modeling a Business Process

To model a business process, drag and drop modeling elements on the Business Process Designer, and then link these components to reflect the logical flow of the business process. eInsight provides the tools you need to quickly develop business process models, including graphic editing tools to help you adjust, size, and align model components.

Business Process Designer

Once you create a new business process, you will build your model in the Business Process Designer (as shown in Figure 9). The Business Process Designer is the area in the Enterprise Designer where you view, create, and edit your business process models.

You can also drag and drop many other ICAN component operations from the Project Explorer directly onto the Business Process Designer or an activity. Some component operations that you can use in a business process include:

▪ File eWay: Read and Write operations

▪ Object Type Definition (OTD): Marshal and Unmarshal operations

▪ Java Collaboration Definition operations

▪ eVision Pages and PageFlows

Create a Business Process Model

Begin designing your business process model by dragging and dropping modeling elements onto the Business Process Designer from the toolbar.

The **Start** and **End** Activity appear on the blank Business Process Designer, by default. There is only one starting point for any business process model. There can be multiple end points.

1   Drag the appropriate modeling elements to your blank business process to the Business Process Designer (Figure 9).

Figure 9   Business Process Model
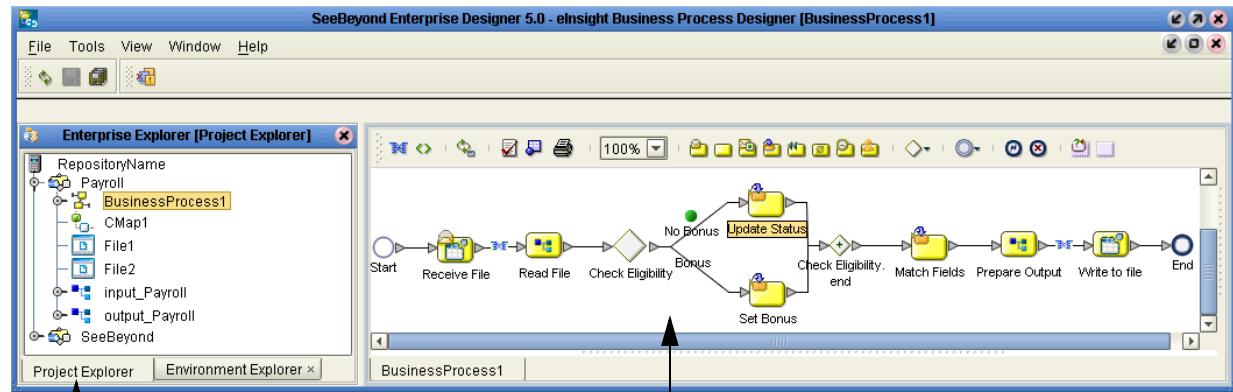
Project Explorer

Business Process Designer

> **2** Draw links between the modeling elements to show the process flow (Figure 9)
>
> **3** Select **Save** to save your changes to the SeeBeyond Repository.
>
> This will validate your business process, generate the code to run it and save your changes to the SeeBeyond Repository.

4.3 Using the Business Process Designer

Using the Business Process Designer is very similar to any of the other ICAN Suite interfaces. When you create a new Business Process, you see the Business Process Designer and the a new Business Process Designer toolbar appears, as shown in Figure 10.

Figure 10   Business Process Designer Toolbar Options
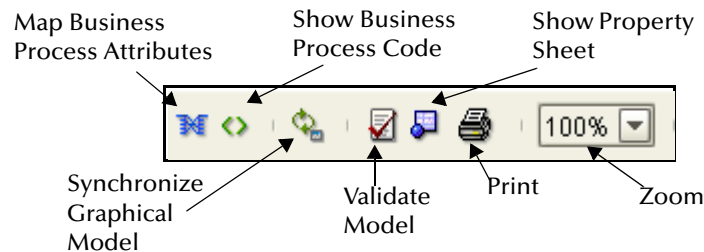
- ▪ **Map Business Process Attributes** - Selecting this icon reveals the Business Rules Designer in the lower portion of the Business Process Designer.
- ▪ **Show Business Process Code** - You can toggle this icon to see and edit the corresponding Business Process Execution Language (BPEL) code.
- ▪ **Synchronize Graphical Model and Business Process Code** - This icon will update the BPEL code on demand. The BPEL code is also synchronized when the model is saved.

- **Validate Business Process Model** - Click this icon to check for any errors in your Business Process Model.

- **Show Property Sheet** - This icon shows the Property Sheet for the modeling element that is selected.

- **Print** - You can print the model from the toolbar. This options also allows you to control the scale of the printed model.

- **Zoom** - Zoom control over the view of the model is available from the toolbar.

4.4   Modeling Elements

eInsight provides a palette of modeling elements to assist you in customizing your business process model. The Business Process Designer is where the you create the business process flow. Like other objects, business processes appear in the Enterprise Explorer.

Elements from the Enterprise Explorer can either be dropped onto empty canvas or onto an Activity. Many elements provide custom settings so that you can model every detail of your process. Each business process model you create consists of some or all of the elements as described in the following sections:

- **Activity** on page 32
- **Branching Activities** on page 34
- **Intermediate Events** on page 35
- **Scope** on page 36
- **While** on page 36

Activity

There are several different kinds of activities you can include in a business process model. Table 2 shows examples of each of the different kinds of activities described below.

Add an activity

1   To add an activity to the modeling canvas do the following:

2   Click an activity from the eInsight toolbar or the Project Explorer list, then drag and drop it where you want it.

3   Click on the activity name and begin typing to rename it from the default. The activity name must contain at least one character (A-Z, a-z, or 0-9), it must start with a letter or an underscore (_) and it may contain spaces.

The selected activity appears on the modeling canvas.

Link modeling elements

eInsight supports orthogonal and diagonal link styles – this setting applies to all links in a model and is an automated application of the style.

To link modeling elements

1 Move your cursor over the connector portion of your modeling element.

2 Hold the cursor over the outside edge of the modeling element until it changes from the arrow pointer to a hand (see Figure 11).

Figure 11 Link Example
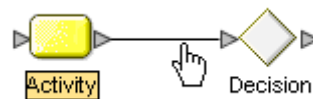
3 Drag a line from the first activity to the connector of the second activity, and then release the mouse.

To change link style

1 Right-click the business process.

2 From the context menu, select Toggle Link Style.

Figure 12 Octogonal Link Style
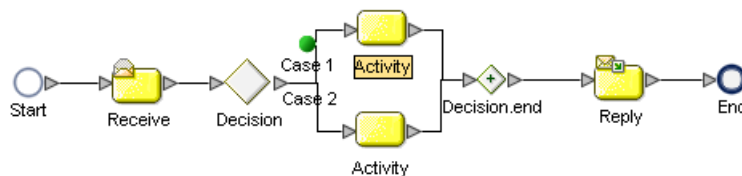
Table 2 Activity Elements

Button	Command	Function
	Start Node	The Start Node is a modeling element indicating the start of the process. This element appears in the Business Process Designer, by default, when you create a new business process model. A Start Node can only link to a **Receive Activity**.
	Link	Links indicate the flow of the business process by connecting activities together.

eInsight ensures the model is being properly linked because it does not allow invalid links to connect. Links can also accept business rules. A link with a business rule is marked with a blue icon. |

Table 2 Activity Elements

Button	Command	Function
	End Node	The modeling element indicating the completed state of a business process. This element appears in the Business Process Designer, by default, when you create a new business process model.
	Receive Activity	This Activity type is the only element that a **Start Node** can link to. It is used to indicate the invocation of a business process or to wait for the arrival of an inbound message. The Receive Activity represents the actual method by which a business process is initiated.
	Activity	An Activity is a step in the business process in which eInsight invokes a Web Service or an ICAN component. Depending upon the configuration of the component, a response may or may not be required.
	Reply Activity	The Reply Activity allows a business process to respond to the external system or user that originally invoked the business process. The original receive at the beginning of the business process is paired with the Reply at the end of the process. In cases where a message must be sent back to the caller of the business process, the Reply uses information that correlates the message in the calling system. A Reply acts as the last step in a business process in which the business process is acting as a Web Service or sub-process. A Reply correlates the outbound message back to the calling process, for example, it can reply to an external system as a Web Service.
	Business Rule Activity	This Activity is used to map and manipulate data in the Business Rules Designer. You can also add a Business Rule to some links for the same purpose.
	Compensate	This element is used to invoke compensation on an inner scope that has already completed normally. This construct can be invoked only from within a fault handler or another compensation handler.
	Empty Activity	This activity allows data to pass through without any changes.
	Wait Activity	The Wait activity acts as a timer. You can build a model in which there are two simultaneous paths within a set scope, one for the business process and one for the timer. If the timer condition takes place first, an exception is thrown, handled and the business process path is abandoned.
	User Activity	This activity is used to represent and configure a step in a business process that requires human intervention. The User Activity is used in Task Assignment.

Branching Activities

Branching Activities are objects you add to your business process models to specify the logical flow of information. eInsight provides three different kinds of Branching Activities—Decisions, Event Based Decisions, and Flow.

Add a Branching activity

To add a Branching Activity to the modeling canvas:

1   Click on the Branching Activities toolbar icon and select the type of Branching Activity you would like to add.

2   Click on your choice and drag it from the menu to the Business Process Designer canvas.

The selected Branching activity appears on the modeling canvas.

Table 3   Branching Activities

◇	Decision	A Decision allows one of several possible paths to execute, based on expression logic. This element is used to create complex expressions that determine the path of the business process. It also contains the expression and connection names. Decisions allow you to define expressions that are evaluated to determine the proper business process flow. Expressions are built using the Business Rules Designer interface and Business Process Attributes.
◈	Event Based Decision	Multiple inbound messages can be juxtaposed against one or more timeout conditions, to allow the type of message received to determine the appropriate business process path.
◈	Flow	Allows you to specify one or more business process paths to be performed concurrently.

Intermediate Events

Intermediate Events are those activities that can receive a Business Process. Some intermediate events handle exceptions that may occur during your business process or compensate for exceptions that occur.

Add an Intermediate event

To add an **Intermediate event** to the modeling canvas:

1   Click on the **Intermediate event** toolbar icon and select the type of **Intermediate event** you would like to add.

2   Click on your choice and drag it from the menu to the Business Process Designer canvas.

Table 4   Intermediate Events

◓	Timer Event	A Timer Event is set upon Activities, sets of Activities or a business process as a whole to ensure that process(es) complete within given amount of time. Timeout conditions also allow you to design the process that takes place after a timeout condition takes place. This modeling element is used with Event Based decisions only.

Table 4 Intermediate Events

	Message Event	This is similar to a Receive Activity, but it occurs only in the middle of a process. Each of these elements can be a different message.
	Catch Named Exception	Each automated system (backend system) or Web service can publish their possible error codes (for instance, fault 15 is "bad data"). Those codes can be mapped to exception handlers. Each exception handler is connected to the scope that surrounds one or more steps in a business process. The components within that scope will throw the exceptions when things go wrong and the exception handler will automatically initiate the appropriate process to handle the problem.
	Catch All Exceptions	This exception handler is configured to handle all exceptions that occur in a scope.
	Compensation Handler	Used when something in a business process fails and requires a rollback of upstream activities (like money has to be returned to the customer account). On an automatic basis in the business process, upstream steps in the business process are notified that the failure has occurred and certain transactions need to be reversed, sometimes in a sequential order. The compensation handler allows you to design the process and circumstances in which the compensation takes place.
	Throw	This element exists in case you want to create an error along a certain business process path.
	Terminate	This element allows you to terminate an entire business process, before it reaches an end node.

Scope

The behavior for one or more activities can be defined by a scope. A scope can provide exception handlers, event handlers, a compensation handler, and data variables. The exception handlers for the scope can be used to catch the faults caused by the possible exception responses.

Table 5 Scope Element

	Scope	The Scope element allows you to apply exception handling to a set of sequential or simultaneous steps in a business process.

While

This modeling element makes it possible to have repeating or looping logic inside of a business process.

Table 6 While Element

	While	This allows you to create a looping process within a business process (for instance, a negotiation process may take several weeks, but the manager wants to review the daily status). The loop continues until the negotiation is complete, and then the business process continues.

4.4.1 Validating a Business Process Model

After creating a business process model, you can check to see if there are any problems such as activities that are not connected or an incorrect number of output links from an activity.

To check the business process for errors

▪ On the toolbar, select **Validate Business Process Model.**

⬧ If an error is encountered, a message box displays information about the error.

⬧ If there are multiple errors, you see a **Next** option to view each error.

⬧ If there are no errors, a message appears stating that there were no errors**,** as shown in **Figure 13.**

Figure 13 Validate Business Process Model
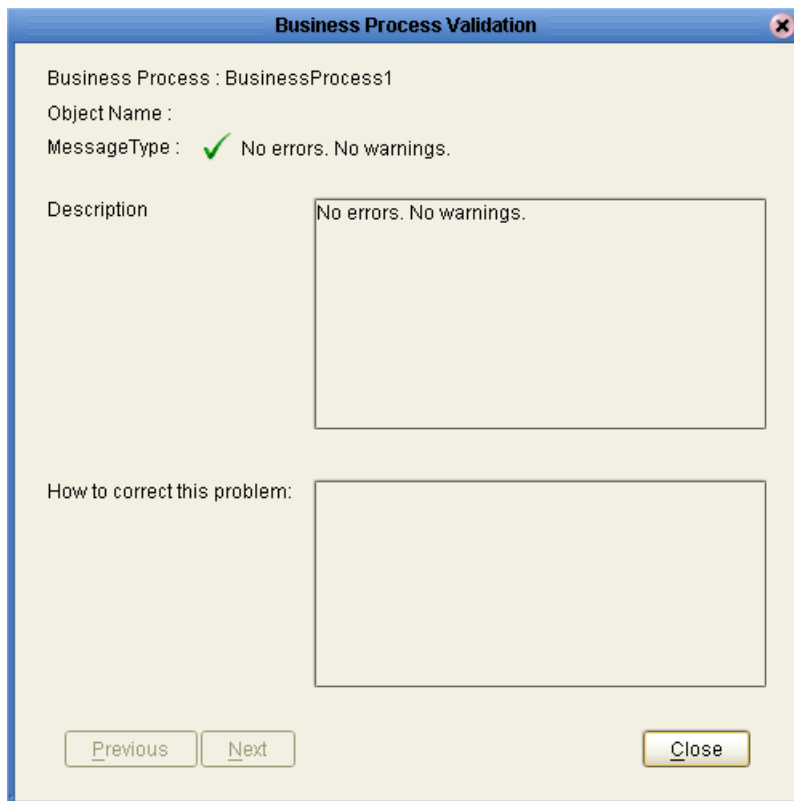
4.4.2 Saving a Business Process Model

Even if a business process model is not complete and/or contains errors, you can save it as a "work in progress" and return to it later.

To save a business process model

1 Do one of the following:

⬧ Pull down the **File** menu and select **Save**

- Press **Ctrl+s** on the Keyboard
- On the toolbar, click **Save**.

Chapter 5

Configuring Business Process Models

This chapter provides the background information you need to configure business process models.

5.1 Overview

Most of the advanced modeling elements and some of the basic modeling elements allow you to configure settings that customize your business processes. Topics in this chapter are:

- **Configuring Modeling Elements** on page 39
- **Business Process Properties** on page 41

5.2 Configuring Modeling Elements

Some modeling elements have configuration options. This section describes those elements and how to configure each option.

5.2.1 Business Rule Activity

The Business Rule Activity is used to map and manipulate data in the Business Rule Designer. You can also add a Business Rule to some links for the same purpose.

Business Rule Links

You can configure logic in a Business Rule Activity or add a Business Rule to a link.

Add a Business Rule Activity

1 Select the Business Rule Activity from the Business Process toolbar.

2 Drag the Business Rule Activity to the Business Process Designer.

3 Click the **Map Business Process Attributes** icon on the toolbar.

The **Business Rules Designer** appears in the lower part of the Business Process Designer.

Add a Business Rule to a Link

1   Right-click on a link that you have created.

2   Select **Add Business Rule**.

3   Click the **Map Business Process Attributes** icon on the toolbar.

The **Business Rules Designer** appears in the lower part of the Business Process Designer.

Business Rule Designer

The Business Rule Designer allows you to configure relationships between Input and Output Attributes. Some attributes are automatically configured for each activity when you drag and drop a component on the Business Process Designer (as shown in Figure 14).

The Business Rules Designer appears when you click the **Map Business Process Attributes** icon (as shown in Figure 14). It is active when you:

§ Add or select a link with a Business Rule.

§ Add or select a Business Rule activity.

Figure 14   Business Rule Designer

Method Palette

Business Rule Designer
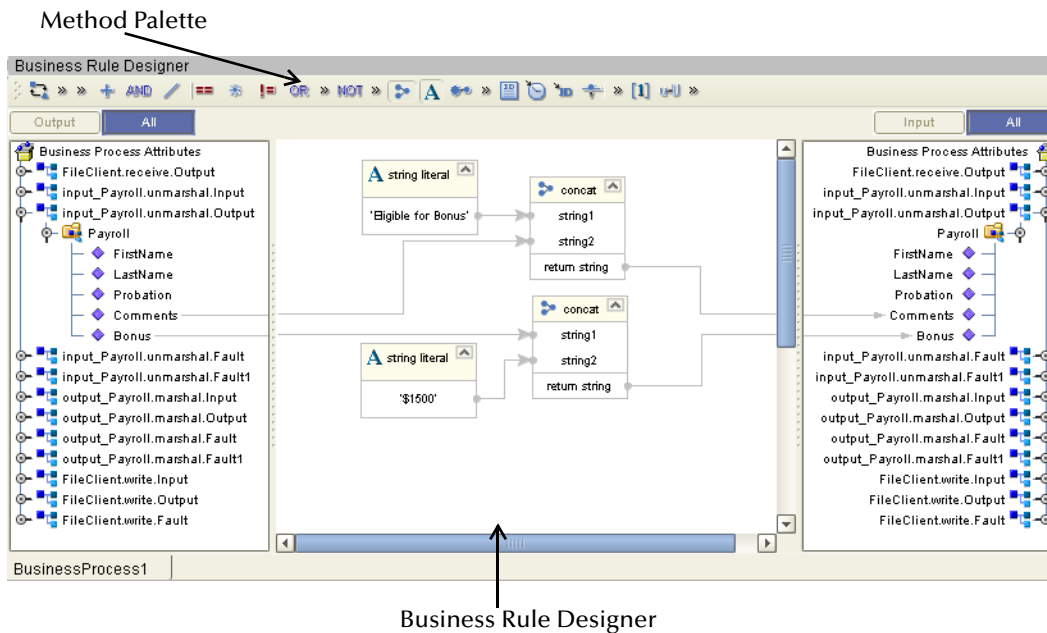
Method Palette

Use the Method Palette in the Business Rule Designer (as shown in Figure 14) to configure data passed between input and output nodes. You can drag and drop a method from the method palette to the Business Rules Designer and then configure the method.

See **"Method Palette" on page 127** for more information about each method available in the Method Palette.

5.3 Business Process Properties

Each Business process has a set of properties that you can change and create. These properties provide rapid creation and deletion of business process attributes. eInsight uses this information to automatically create the appropriate business process attributes and input/output structures, for use in the Business Rule Designer.

Edit Business Process Properties

1 Right-click on the **Business Process** you want to edit.

2 Select **Open Business Process Properties Sheet**.

The **Business Process Properties** dialog appears as shown in Figure 15.

Figure 15 Business Process Properties: General Tab
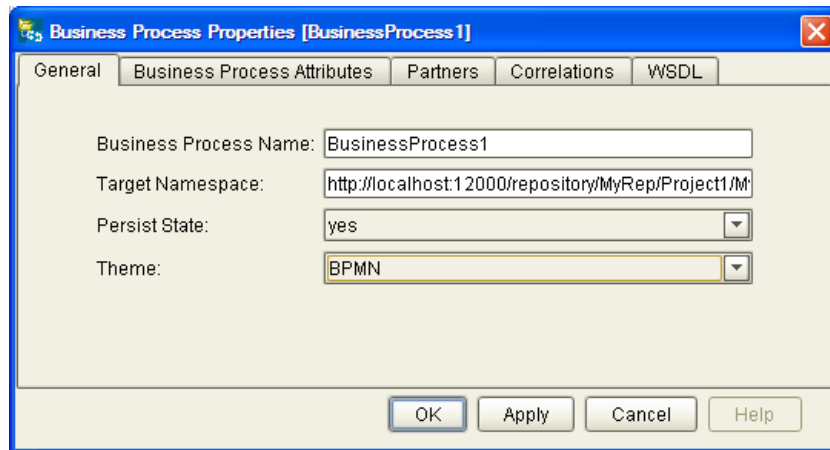
5.3.1 General

The General Tab is the first tab you see when you begin to edit a business process property. You can change the business process name, edit the target namespace and select the Persistence State from this tab.

Edit General Business Process Properties

1 From the **General** tab, you can edit:

- **Business Process Name -** Change the default name.

- **Target Namespace** - address of the business process.

- **Persist State** - See **"Configure Persistence for the Business Process" on page 67** for more information.

- **Theme -** The default Theme is BPMN. Select Custom 1 for a different look.

2 Click **OK** to Save your changes and exit the **Business Process Properties** dialog box.

5.3.2 Business Process Attributes

Business Process Attributes are data values used by a business process. They make it possible to share data between activities in a business process as well as move data to and from the components that implement those activities. Complex structures such as OTDs and Collaborations are represented automatically in the Enterprise Explorer and are available for use in your business process.

Some examples of Business Process Attributes are:

- customer names
- addresses
- order quantities
- item descriptions

Business Process Attributes are used to pass values between the business process and external sources. Business Process Attributes can also be assigned to specific activities. For example, the customer name is passed to an order process from the originating source. The customer name may be used by several of the activities in the business process and is included in the business process output.
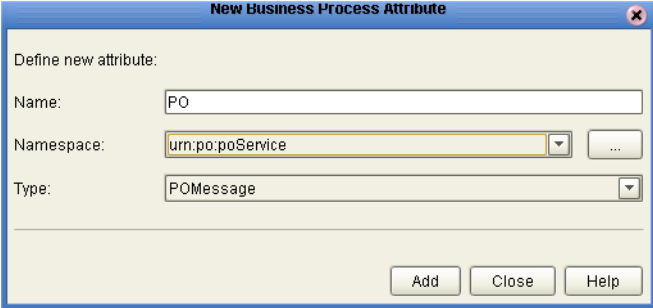
eInsight can pass all or part of a complex structure or it can even assemble a composite input to a component or Web Service from multiple business process attributes.

Create New Business Process Attribute

1 Select the **Business Process Attributes** tab (see Figure 17).

2 Select **New** to add a **New Business Process Attribute**.

The **New Business Process Attribute** dialog box appears as in Figure 16.

Figure 16 New Business Process Attribute

3 From this dialog, complete the following information:

- ◆ Enter a **Name** for the attribute.
- ◆ Select or browse for an existing **Namespace.**
- ◆ Select an available **Type** for your attribute.

4 Click **Add** to Save the attribute or Close to return to the **Business Process Properties** dialog box.

Edit a Business Process Attribute

1 Select the **Business Process Attributes** tab (see Figure 17).

Figure 17 Business Process Properties: Business Process Attributes Tab
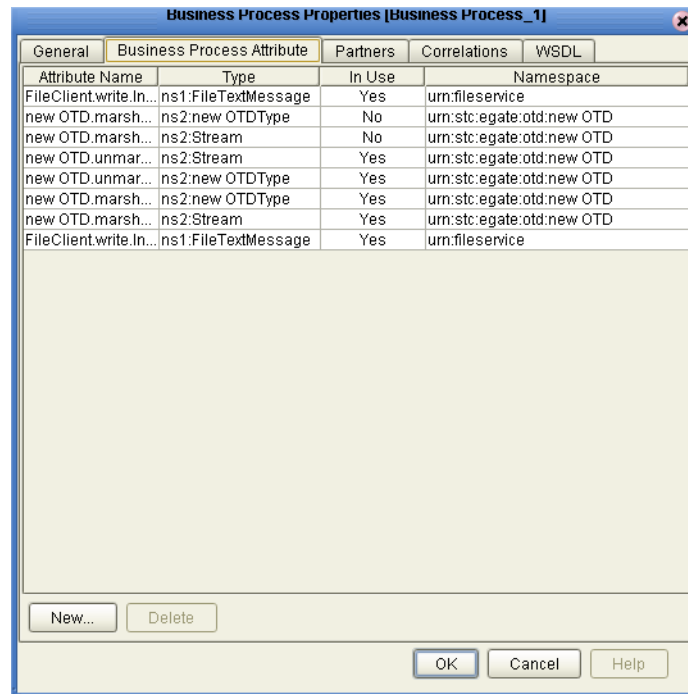
2 Select an existing attribute and:

- **Rename**: Select and double click the attribute name to rename it.

Note: *Some attributes cannot be renamed.*

- **Delete**: Select Delete to remove the attribute.

3 Click **OK** to Save your changes and exit the **Business Process Properties** dialog box.

5.3.3 Partners

The Partner is an abstracted identification for an external system that will appear in the Binding dialog within the Connectivity Map Editor. Multiple activities can use the same external system – hence, multiple Activities may have the same Partner. By default, eInsight assigns this identification to speed up and automate the model development.

Create New Partner

1 Select the **Partner** tab (see Figure 18).

Figure 18   Business Properties: Partner Tab
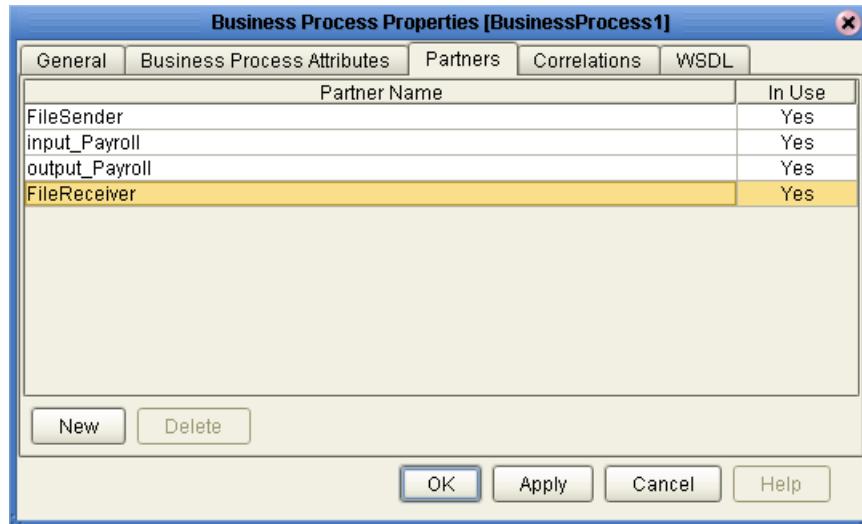
2 Select **New** to add a **New Partner**.

The **New Partner** is added to the Partner list, as shown in Figure 19.

Figure 19   New Partner
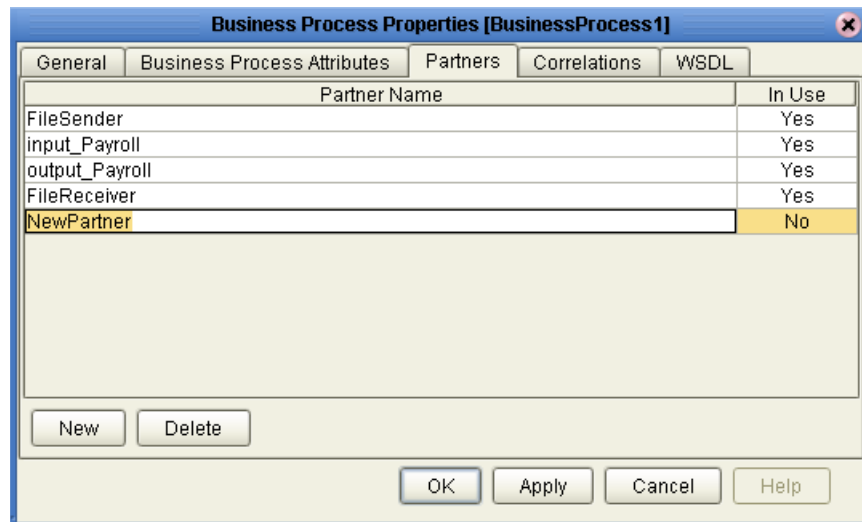
3 Click the Partner name to rename the Partner.

Delete a Partner

You can only delete a Partner that is not in use.

1 Select the **Partner** tab (see Figure 18).

2 Select the Partner name that you want to remove.

3 Select **Delete** to remove the Partner.

The **New Partner** is removed from the Partner list.

Select a Partner for an Activity

1 Select an activity from the Business Process.

2 Click the Show Property Sheet icon from the eInsight toolbar.

   The activity's property sheet appears, as shown in Figure 20.

Figure 20 Activity Properties
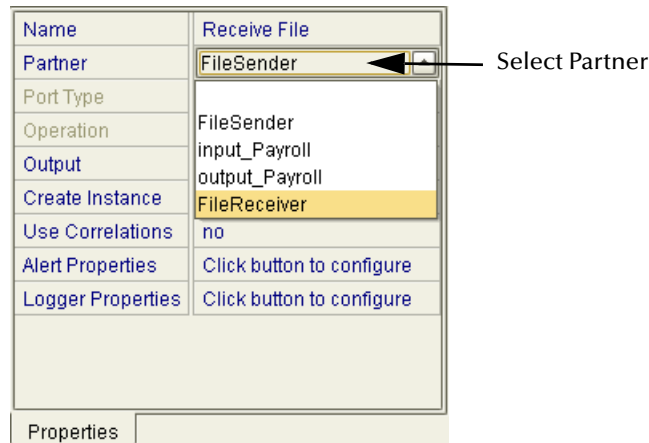
3 Click the Partner field and select or change the default Partner from the drop-down list.

5.3.4 Message Correlation

In some situations, you want to impose conditions on a set of messages, process a group of messages together or make a decision contingent on the receipt or non-receipt of all messages of a certain type. These situations can be handled using Message Correlation.

You can use Message Correlation when you want to sort messages into separate groups and execute your business rules on a group-by-group basis rather than an message-by-message basis. Messages in the same group are linked.

Groups are stored in memory, to facilitate processing each one as a unit. eInsight refers to these groups as containers. As eInsight retrieves a message, it correlates the received message against a business process instance. If found, eInsight stores the message in the container for that business process. Otherwise, it will instantiate a new instance of that business process.

Message Correlation Example

In this example, the business process, expects to receive three course grades. The courses are Math, English and Computer Science. Each message contains the course grade, the course type, and a Correlation ID to indicate where this message belongs.

A new message arrives with a Correlation ID of 101. The first thing eInsight does is correlate that message to see if there is a match on the newly arrived message. Since this is the very first message, there is no match and a new instance is created. The second

message has a Correlation ID equal to 101 and is forwarded to the same business instance as above. The third message has a Correlation ID of 102. Thus it is forwarded to a new business instance and so on.

This process can continue based on conditions set by the user. This is based on Count or time expiration. A sample business process is shown below for Message Correlation. The first business process uses a File eWay to read a DTD based message, unmarshal it and then invoke the second business process passing in the unmarshaled message.

Figure 21   Message Correlation: First Business Process

The second business process receives the unmarshaled message using Event Based Decision and Timer Events. The Event Based Decision and Timer Events are in a While loop. The While continues to loop until either a count has been reached or time has expired. When a messages are received, they are stored in containers.

Figure 22   Message Correlation: Second Business Process
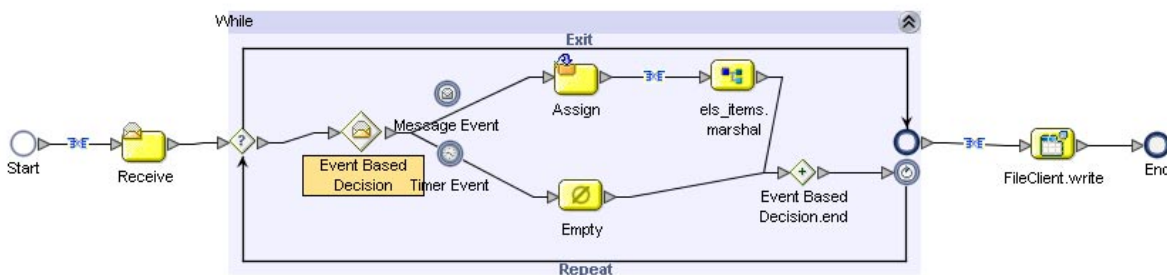
The Timer Event is used to set the expiration time. If time expires, then the loop condition is set to false to terminate the loop. If a message is received, then message counter is incremented and if the maximum number of messages have been received, then loop is terminated. At the end, the date is written to a file.

5.3.5 Correlation Keys and Sets

Configuring Correlation consists of the following steps:

- **"Create a Correlation Key" on page 47**

  A *correlation key* is a value that you can assign to a business process, like a Purchase Order number. The correlation key provides a way to associate and route information about specific business process instances. For asynchronous message

exchange between components, you must implement correlation of the instance identification. An example of when you use asynchronous message exchanges is when you create a Receive activity in the middle of a business process.

- **"Add Correlation Sets" on page 48**

  Correlation sets are groups of properties shared by all messages in the group. A correlation set matches messages and conversations with a business process instance. For example, you may wish to assign a Purchase Order number and an invoice number to a transaction, so that all information about the purchase and payment are associated.

- **"Bind Sets of Correlations to Activities" on page 49**

  When using one or more correlation sets within a business process, the values must be initialized at some point. If the user chooses to initialize the set within an Activity, they will also identify which Business Process Attribute will be used (or both).

Create a Correlation Key

1 Select the **Correlations** tab (see Figure 23).

Figure 23 Business Process Properties: Correlations Tab
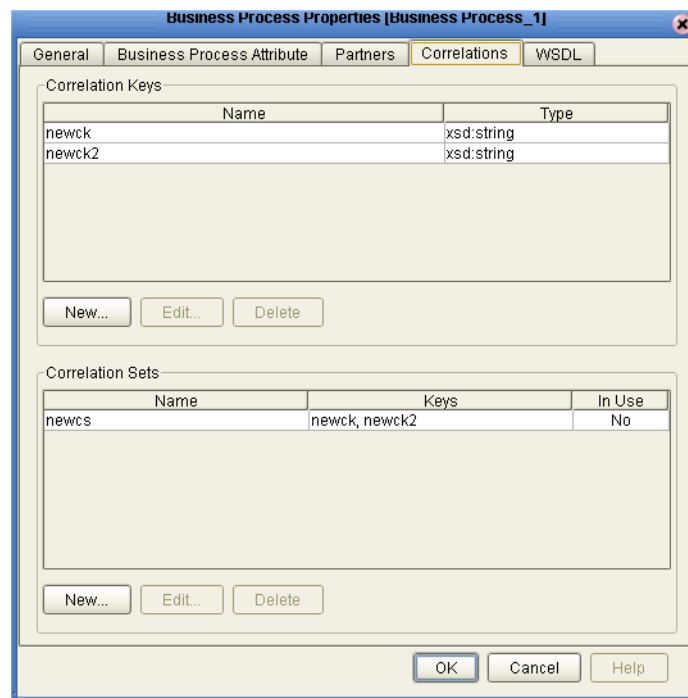
2 Select **New** from the **Correlation Keys** section of the dialog box.

The **New Correlation Key** dialog appears as shown in Figure 24.

Figure 24 New Correlation Key Dialog Box
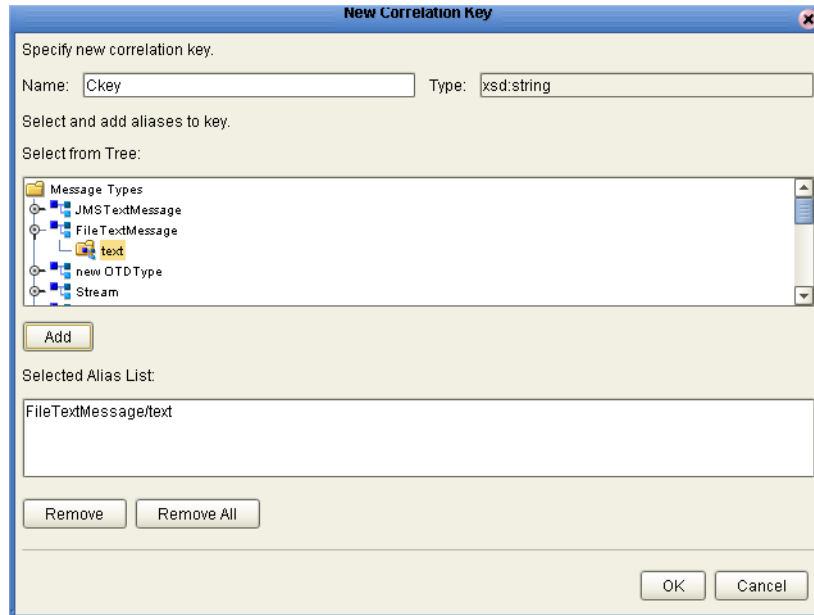
3 From the **New Correlation Key** dialog box:

A Enter a **Name** (alias) for the Correlation Key

B Select a **Message Type** from the list to alias. Select one or more correlation keys that comprise a unique identifier for a step in a business process.

4 Click Add to save the new alias to the **Selected Alias List**

5 Click **OK** to save your changes and exit the **New Correlation Key** dialog box.

Add Correlation Sets

1 Select the **Correlations** tab (see Figure 23).

2 Select **New** from the **Correlation Set** section of the dialog box.

The **New Correlation Set** dialog appears as shown in Figure 25.

Figure 25 New Correlation Set Dialog Box
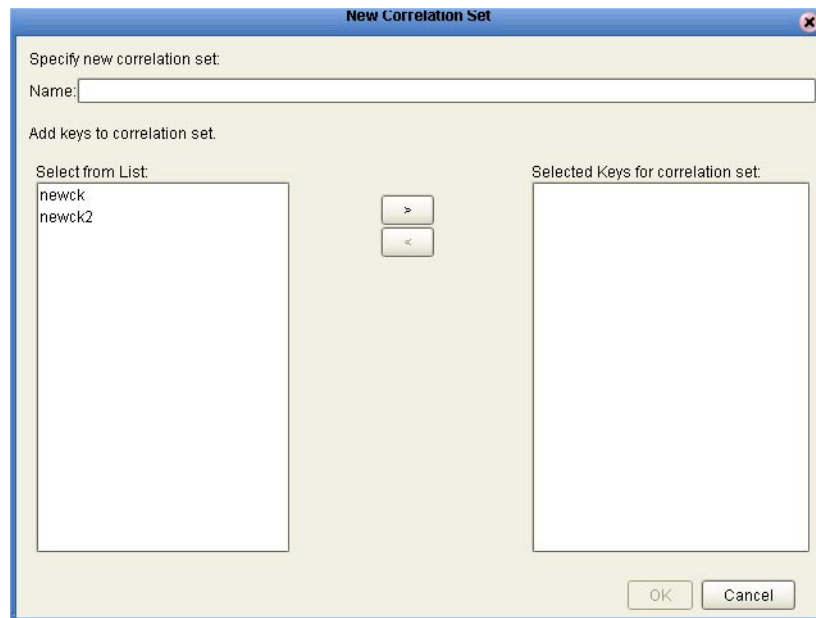
3 From the New Correlation Set dialog box:

A Enter a **Name** for the new Correlation Set.

B Select **Correlation Keys** from the list to add to the Correlation Set.

C Click the arrow button to move your selections to the Correlation Set.

4 Click **OK** to save your changes and exit.

Bind Sets of Correlations to Activities

1 Select an Activity.

2 Select **Show Property Sheet** from the toolbar.

3 Locate **Use Correlations** and select **Yes.**

5.3.6 WSDL Files

WSDL files are used to invoke and operate Web services. WSDL files can be used for web services on the Internet and/or to access and invoke remote applications and databases.

The WSDL tab is available from the Business Process Properties dialog. From this dialog, you can upload a WSDL file that represents predefined Business Process Attributes for use in your business process.

Upload a WSDL File

1 Select the **WSDL** tab (see Figure 26).

Figure 26   Business Process Properties: WSDL Tab
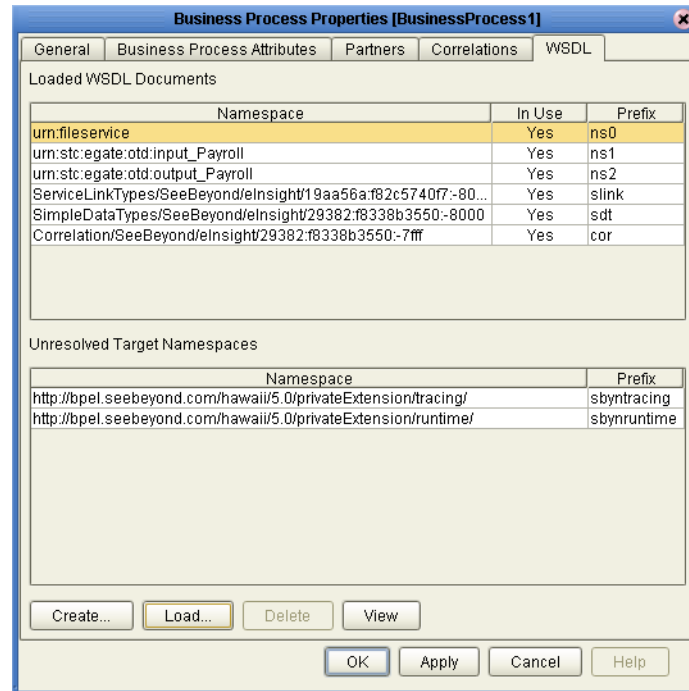
2   Click **Load** to upload a WSDL file.

The **Load WSDL** dialog box appears, as shown in Figure 27.

Figure 27   Load WSDL dialog box
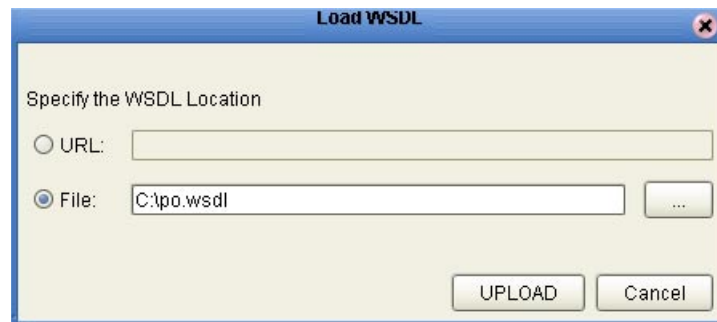
3   From the **Load WSDL** dialog box:

A   Select **URL** or **File**, to choose where your WSDL file is located.

B   Enter the path to the WSDL file.

You can also use the browse button to locate a File location.

4   Click **UPLOAD**.

Note: *eInsight does not create the full WSDL Input message if the required inputs/leaf nodes are not mapped in the Business Rule Designer. The part of the message which has not been mapped is not generated. This can cause errors at runtime.*

WSDL Interface Designer and Viewer

Create a New WSDL File

1 Click **Create** to create a new WSDL file.

2 The **WSDL Interface Designer** appears, as shown in Figure 28.

Figure 28 WSDL Interface Designer
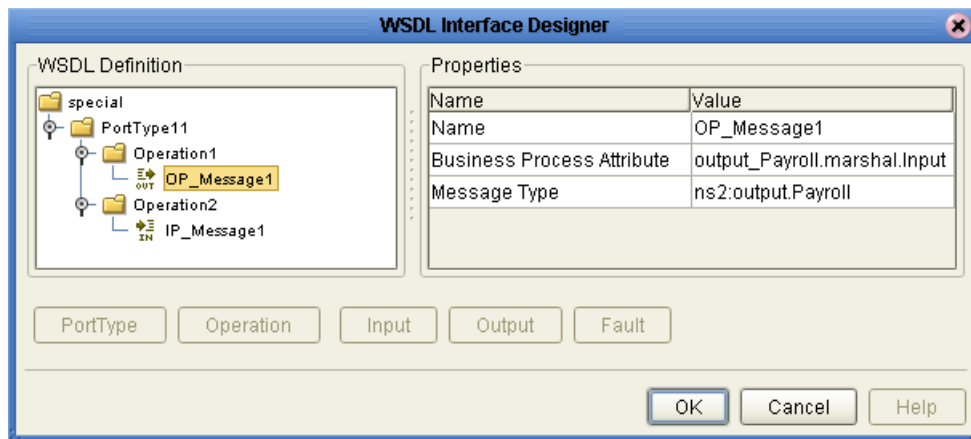
3 Specify the following:

- PortType

- Operation

- Input and/or Output and/or Fault

4 Click on each WSDL definition to select the Business Process Attribute and Message Type that you will use.

Note: If you accept the defaults for WSDL creation, the file is unique.
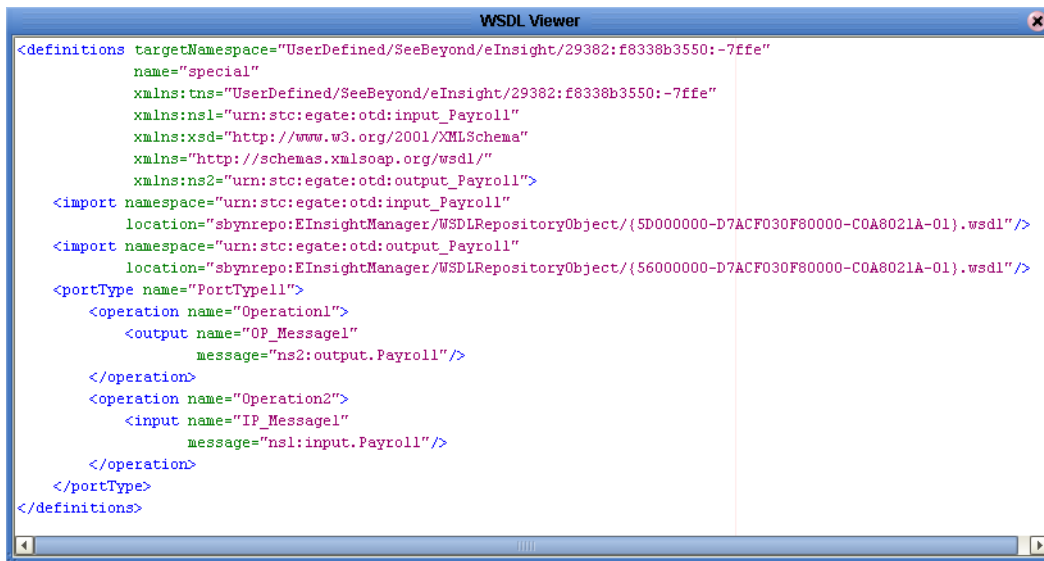
Edit a WSDL file

1 Select the WSDL tab from the Business Process Property sheet.

2 Select a WSDL file from the list and click Edit.

3 The WSDL Interface Designer appears, as shown in Figure 28.

View a WSDL file

1 Select the WSDL tab from the Business Process Property sheet.

2 Select a WSDL file from the list and click **View**.

3 The WSDL Viewer appears, as shown in Figure 29.

Figure 29   WSDL Viewer

4   From the WSDL Viewer you can copy all or part of the WSDL code to the clipboard, and paste it to a text file.

You cannot edit from the WSDL Viewer.

5.3.7 **Sub-Processes**

Sub-processes are deployed business processes that can be invoked within the same Integration Server. When a sub-process is dropped into a business process, the Business Rules Designer is used to configure the input and output attributes for the sub-process.

Sub-processes are necessary when using the User Activity. See **Create the SubProcess** on page 111 for a detailed example of a sub-process.

Sub-Process Overview

- Create a Business Process (this is the parent process). Create an Empty Activity as a placeholder for the sub-process.

- Create a second Business Process (this is the sub-process). Create an empty Receive Activity at the beginning of the Business Process and Reply Activity at the end.

- Create or upload a WSDL file that represents the inputs and outputs of the sub-process.

- Create a Partner from the Business Process Property Sheet: Partner tab.

- In the sub-process, open the properties of the initial Receive and select the appropriate Partner, portType, and operation. Do the same for the Reply.

Note: *If the sub-process is to be invoked as a synchronous request/reply web service, the Receive and Reply must have the same partner, portType, and operation.*

- Generate the Business Process Code and save the sub-process.

- Return to the parent process from the Project Explorer, drag the first operation under the sub-process to the sub-process placeholder in the parent business process.

Note: *It is not always the first operation - it is the operation assigned to the Receive/Reply in the sub-process.*

- Perform any input/output mappings using the Business Rule Designer, in the parent business process.

Note: See **Create the SubProcess** *on page 111* for a detailed example of a sub-process.

5.3.8 Repeating Nodes

For Web Services/components that contain repeating nodes, the Business Rule Designer displays repeating nodes within the input/output Attributes for each Activity. Repeating nodes contain the repeating icon. For direct node mapping, repeating nodes are used to dynamically populate 1-n values based on the runtime data.

Mapping Elements within Repeating Nodes

1 From the Method Palette, in the Business Rule Designer, select the **copy-from** method and drop it into the operator canvas.

This action opens the **copy-from** entry box.

2 Enter the XPath expression and link it to the input of the appropriate activity.

The link from the appropriate output is implied within the XPath expression.

XPath Predicates

The XPath predicate functionality allows the user to isolate particular elements within repeating nodes at runtime.

When assigning values in the Business Rule Designer, you can access a *predicate* operator to extract particular elements from repeating nodes within a business process attribute. The Attribute uses the repeating characteristic of the node from the underlying OTD. The operator includes an example for the xpath syntax. At runtime, the XPath expression selects the correct element and performs the mapping as designed.

5.3.9 Business Processes as Web Services

A Business Process can be exposed as a Web Service. Business Processes can also invoke other external web services. The Web Services created are available to be invoked by any Web Service client. Upon activation, the WSDL for the business process is placed in

the ICAN Repository and browsable from a UDDI browser, as shown in **Browse Web Services** on page 54.

Figure 30   Browse Web Services
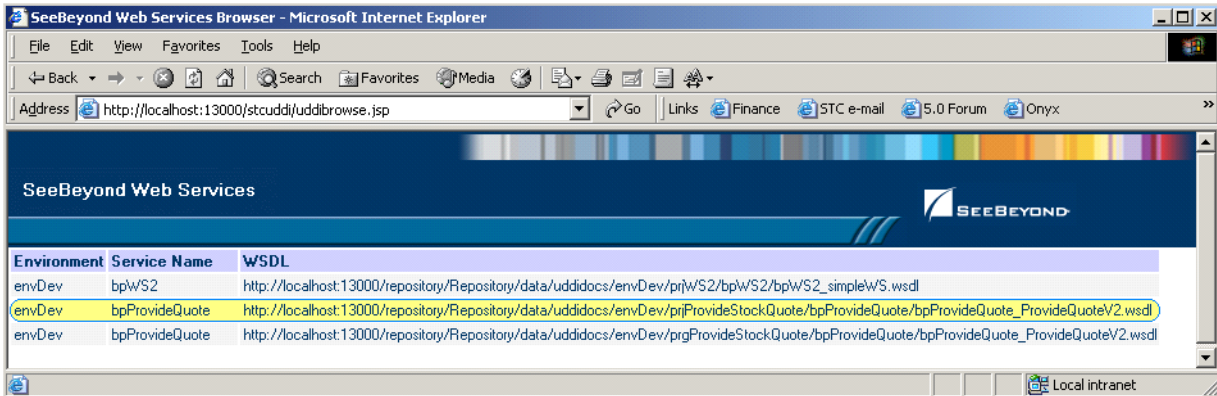
Web Service Application

Use the Web Service Application icons in the Connectivity Map to map a business process to a web service, as shown in Figure 31.

Figure 31   Web Service Application

<div align="right">

Chapter 6

</div>
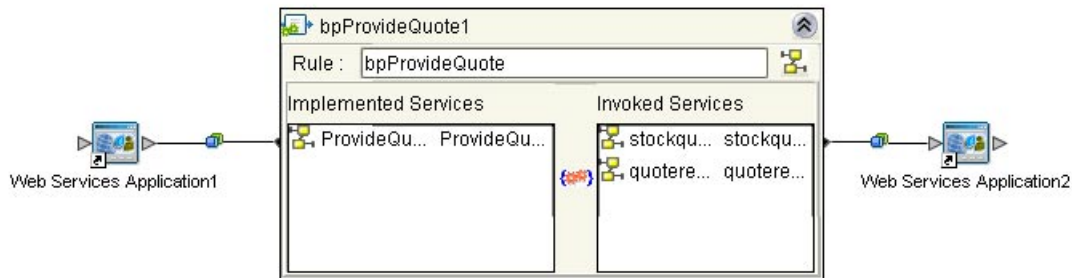
Exception Handling

This chapter explains the concept of exception handling and how to configure various methods of handling errors.

6.1 Overview

eInsight ensures the integrity of critical business transactions and long-lived processes as they flow between multiple applications and multiple enterprises via automated exception handling capabilities. Exceptions can be automatically handled so that every process either completes or is successfully backed out using compensating transactions to ensure consistent information flows between systems.

6.1.1 Scope and Process Level Exceptions

In eInsight, Exception Handling allows one or more components to throw an exception that is caught by eInsight within a Scope or at the process-level. Scope allows you to define a range for handling exceptions. The range of the Scope can span one or more Activities in the business process. When your exceptions handler is not attached to a Scope, the Exception Handling is at the process level.

You can configure eInsight to catch all exceptions or certain exceptions that you specify. The elements that you use to configure Exception Handling in your model are:

- Catch Named Exceptions
- Catch All Exceptions

Exception Handling Configuration

Exception handlers are configured to catch errors that are thrown by components and/ or Web Services. These systems can be configured to publish one or more exceptions.

Catch Named Exception

To catch a named exception, there must be a defined fault in the WSDL file for your business process. You can use defined faults or create a WSDL file that includes faults with the WSDL Interface Designer (see **WSDL Interface Designer and Viewer** on page 51).

1 Drag a Scope element to the Business Process Designer.

2 Drag one or more activities into the Scope and connect the Scope to the rest of your business process, as shown in Figure 32.

Figure 32 Build an Exception Handler
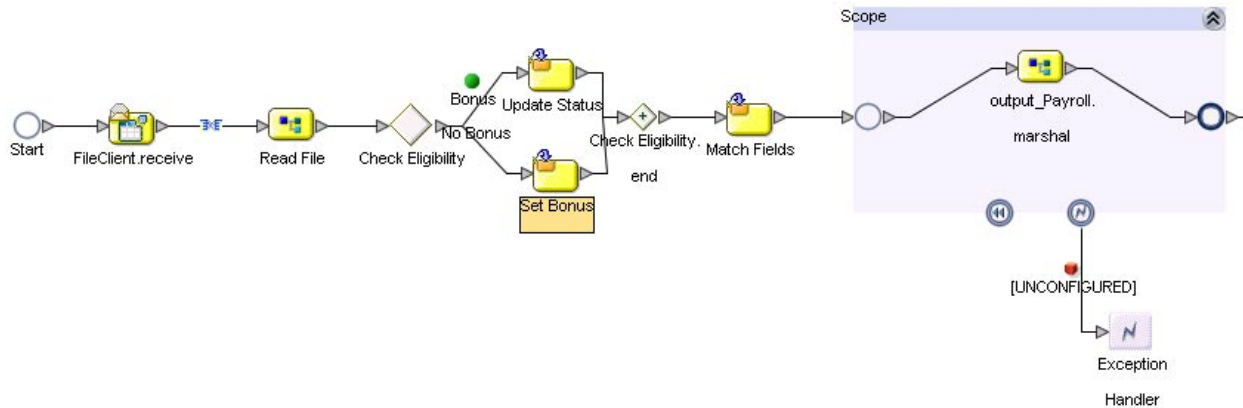
3 Drag the **Catch Named Exception** activity onto the Exception icon of the **Scope** for which the Exception Handler applies. See Figure 33.

Figure 33 Named Exception Handler
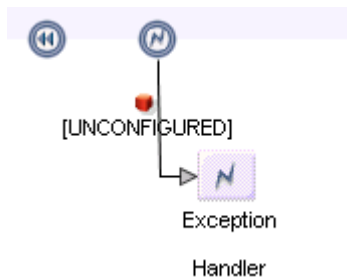
4 Select the Exception Handler activity and then click the **Show/Hide Property Sheet** from the Business Process Designer toolbar.

The property sheet appers on the right of your screen, as shown in Figure 35.

Figure 34 Named Exception Properties

Exception Name	ns2:MarshalException
Output	output_Payroll.marshal.Fault1
Alert Properties	Click button to configure
Logger Properties	Click button to configure

5 In the Exception Handler properties, double-click the empty fields to reveal a drop-down list and configure the following:

  ♦ The **Exception Name** – which is the runtime value for the exception that will be passed from the component to eInsight at runtime.

♦ The **Output** – which is the output Attribute that contains the runtime name of the thrown fault.

The fault name is auto-populated with values based on the components (and the associated WSDL files) in the Business Process Designer. If the drop-down lists are unpopulated, then there is no WSDL in use with defined exceptions. In this case, you must:

♦ Load a WSDL file with defined faults. See **"WSDL Files" on page 49** for more information.

♦ Create a WSDL file with defined faults. See **"WSDL Interface Designer and Viewer" on page 51** for details.

6 Close the Property Sheet by clicking the **Show/Hide Property Sheet** on the Business Process Designer toolbar.

Figure 35 Configured Exception
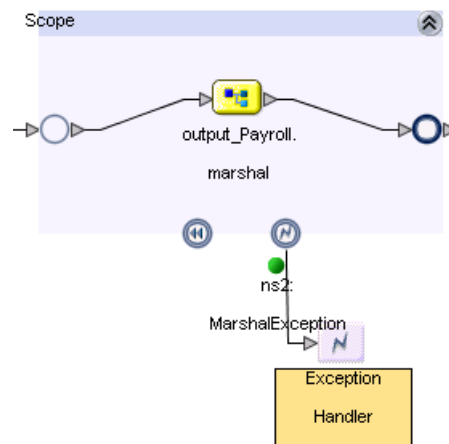
Once the Exception Handler is configured, the red icon will turn green and the Exception name appears on the link. See Figure 35 for an example of the configured Exception Handler.

Catch All Exceptions

To use **Catch All Exceptions:**

1 Drag the **Catch All Exceptions** activity to a **Scope** in the Business Process Designer or onto the canvas, as shown in Figure 36. This will capture any and all exceptions that occur.

Figure 36 Catch All Exceptions (Process-Level)
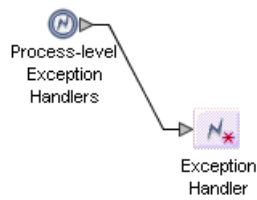
2 Double-click the Exception activity to configure the Exception Handler, as shown in Figure 36.

Figure 37 Configure Catch All Exceptions
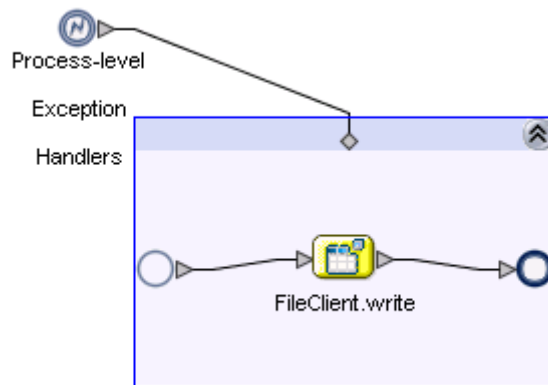
You can configure the Exception Handler to perform an action when an exception is encountered. In Figure 36, the Exception Handler has been configured to write the exception to a file.

Compensation

Exception handling in business processes relies heavily on the concept of *compensation*. Compensation is an application-specific activity that reverse the effects of a previous activity that was carried out as part of a larger unit of work that is being abandoned.

Business processes are often of long duration and use asynchronous messages for communication. They also manipulate sensitive business data in back-end databases and line-of-business applications. As a result, the overall business transaction may fail or be cancelled after many transactions have been committed during its progress. In these cases, the partial work may need to be reversed.

Compensation allows the modeler to create the process flow for executing complex compensations. Exception Handlers for parent scopes invoke the correct Compensation Handlers in the appropriate order.

The Compensation Activity is used as an exception handler to initiate the compensation process. Compensation is used with the Scope element.

Configure Compensation

1 Drop a Compensation Handler within a Scope to create the compensation logic for a given Scope.

Figure 38 Compensation
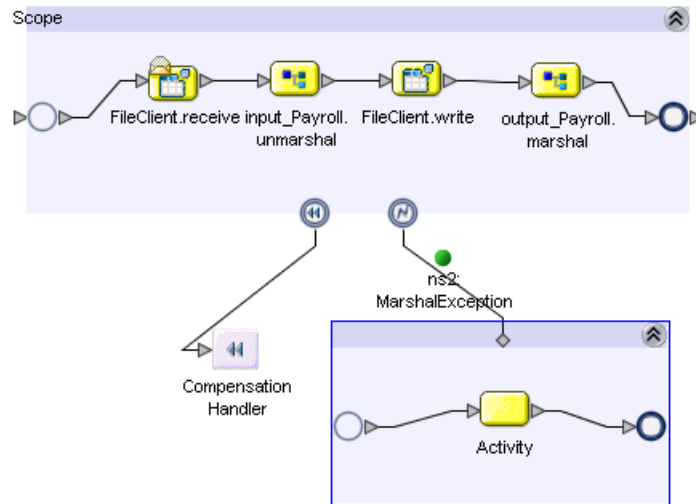
2 Model the Compensation process as a business process.

Chapter 7

Deploy Business Process Models

7.1 Overview

Topics in this chapter are:

- **The Business Process and the Connectivity Map** on page 60
- **Deploy a Business Process** on page 62

7.1.1 The Business Process and the Connectivity Map

The Connectivity Map represents connection information in the ICAN Suite. The flow is represented at a higher level than in the Business Process Model. eInsight also uses the information in the Connectivity Map to establish and maintain connections to systems for the correct step in a business process.

Creating the Connectivity Map that Includes a Business Process

1 Drag the desired Business Process from the Enterprise Explorer to the Connectivity Map Editor.

2 Add the external systems and components to the Connectivity Map Editor, as shown in Figure 39.

Figure 39 Connectivity Map with Business Process
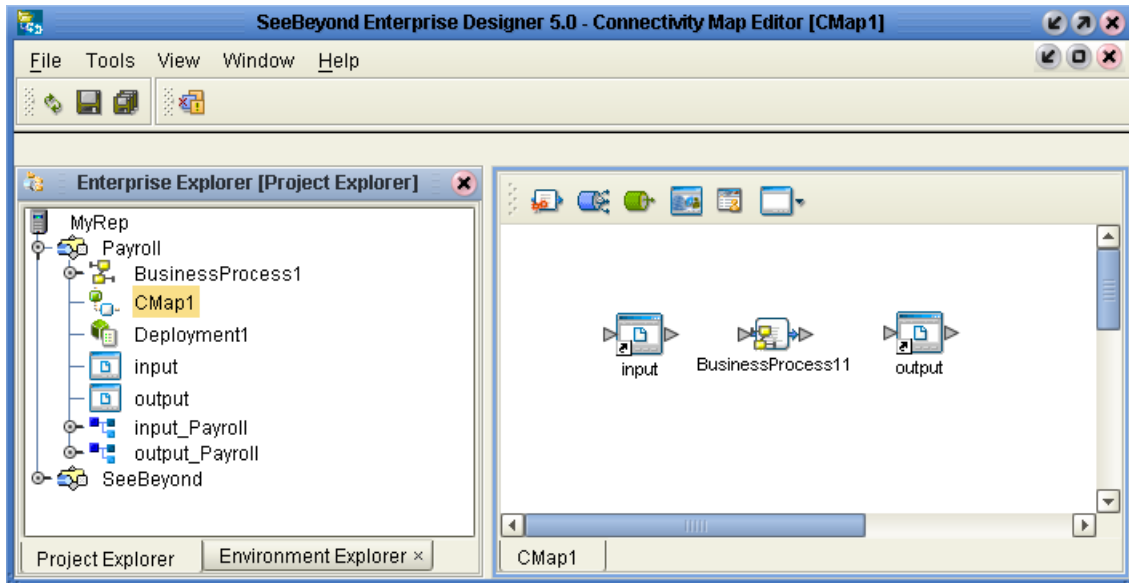
Open the Business Process to Connect the Activities

1 Double-click on the Business Process in the Connectivity Map to open the Binding Dialog.

2 Connect the Activities to the appropriate component, as shown in Figure 40.

Figure 40 Connectivity Map: Business Process Binding
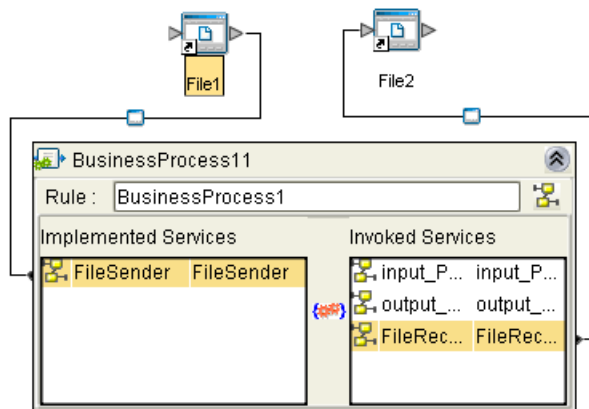
◆ Receive Activities appear in the left pane.

◆ Invoke and Reply Activities appear in the right pane.

7.1.2 **Deploy a Business Process**

A business process is like any other ICAN Suite component. After creating your Environment, Logical Host and other necessary hosts, create a Deployment Profile.

Figure 41   Deployment Profile
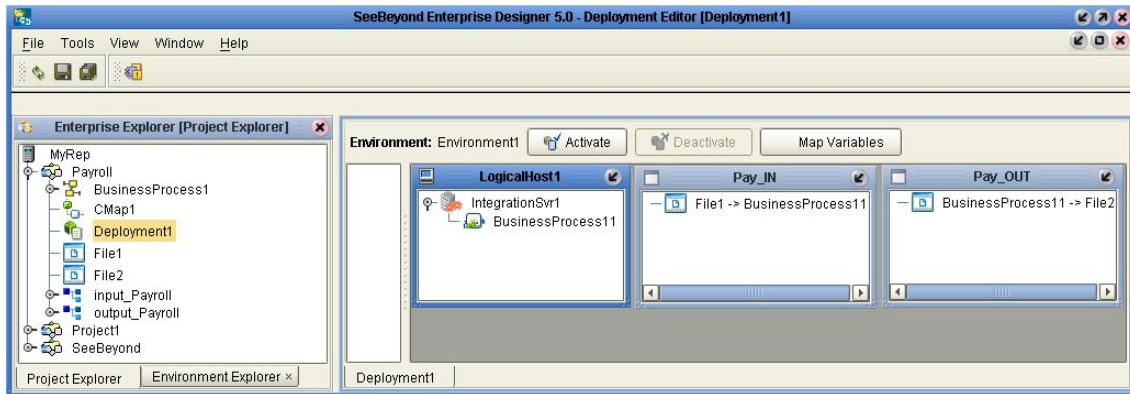
The deployable components along with the Business Process from the Connectivity Map will appear in your Deployment Profile. Drag and drop the Business Process to the desired Integration Server. Activate your Deployment Profile to complete the deployment of the components to the target hosts. For more information about Deploying a Project, see the *eGate Integrator User's Guide*.

Chapter 8

Persistence and Monitoring

This chapter discusses Persistence and Monitoring. Both of these features require that you have a database available.

8.1 Overview

eInsight contains database scripts to create the eInsight database schema. The database schema allows you to collect and persist data from your business process. Once the data is persisted, you can also use the Enterprise Manager to monitor business processes. See **Database Support** on page 25 for information about supported databases.

The main areas to be configured in order to have persistence are:

- **eInsight Engine Configuration** on page 63
- **Run Database Scripts** on page 65
- **Configure Persistence for the Business Process** on page 67

8.1.1 eInsight Engine Configuration

To configure the eInsight Engine

1   Right-click the Integration Server (IS) in your Environment from the Environment Explorer and open the tree structure that contains properties.

2   Navigate to, and select the eInsight Engine.

The properties dialog appears for the eInsight Engine, as shown in **Figure 42 on page 64**.

Figure 42 eInsight Engine Configuration
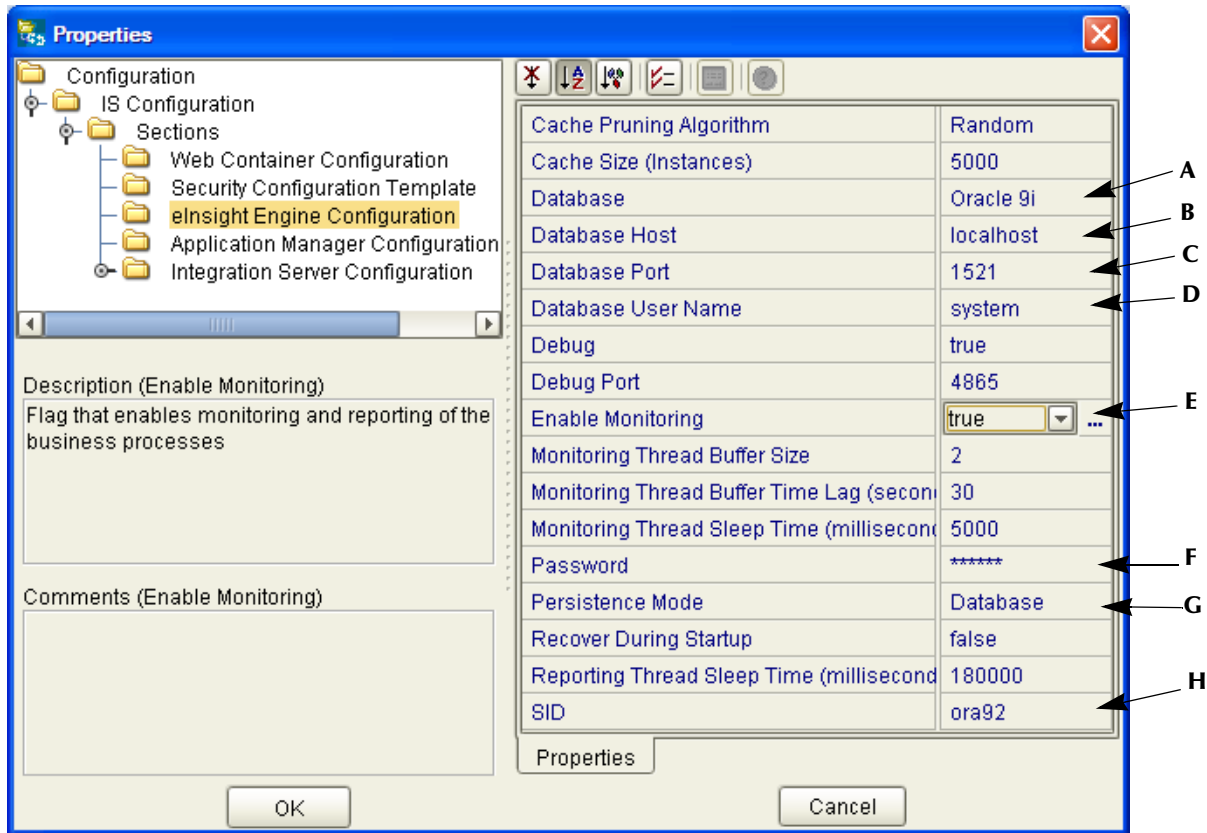
3   Configure the following to connect to a database:

   A   Database - Select Sybase 12.5, Oracle 8.1.7, Oracle 9i, or SQL Server 2000.

   B   Database Host - Enter the name of the machine where your database resides.

   C   Database Port - Enter the port number to connect to your database.

   D   Database User Name - Enter the User Name for your database.

   E   Enable Monitoring - Select True to use Monitoring.

   F   Password - Enter the password for your database user.

   G   Persistence Mode - Select Database to use persistence.

   H   SID - Enter the database name or SID.

Note: *The other eInsight settings can be left as default, or you can change the options to your preference.*

8.1.2 Create the eInsight Database

To create the runtime recoverability database schema, you can run a database script that is automatically installed with eInsight.

Configure database connection

1 Expand the SeeBeyond folder in the Project Explorer.

2 Expand the eInsight folder that is located under the SeeBeyond folder.

3 Expand the Run Database Scripts folder.

4 Right-click the Database Scripts folder and choose Properties.

5 Enter your database configuration information.

Note: *If you are using a Sybase or SQL Server database, you need to modify the scripts before you execute. Enter the database user and password that has privileges to your Sybase or SQL Server database. See* **Modify Scripts** *on page 66 for more information.*

Database Connection Information

Oracle

```
Database Type: oracle
Database DriverName:  oracle.jdbc.driver.OracleDriver
Database URL: jdbc:oracle:thin:@<host>:<port>:<SID>
Database User ID: <userid>
Database Password: *****
```

Sybase

```
Database Type: sybase
Database DriverName:  com.sybase.jdbc2.jdbc.SybDriver
Database URL: jdbc:sybase:Tds:<host>:<port>/<dbname>
Database User ID: <userid>
Database Password: *****
```

SQL Server

```
Database Type: sqlserver
Database DriverName: com.SeeBeyond.jdbc.sqlserver.SQLServerDriver
Database URL:
jdbc:SeeBeyond:sqlserver:<host>:<port>;DatabaseName=<dbname>
Database User ID: <userid>
Database Password: *****
```

Run Database Scripts

The database user that executes these scripts must have permission to create/delete tables.

Install Scripts

1 Expand the SeeBeyond folder in the Project Explorer.

2 Expand the eInsight folder that is located under the SeeBeyond folder.

3 Expand the Run Database Scripts folder.

4 Select the appropriate database install file for Oracle, SQLServer or Sybase.

5 Right-click the file associated with the appropriate database (Oracle Install, SQLServer Install or Sybase Install) and select Run.

Uninstall Scripts

1 Expand the SeeBeyond folder in the Project Explorer.

2 Expand the eInsight folder that is located under the SeeBeyond folder.

3 Expand the Run Database Scripts folder.

4 Select the appropriate database file for Oracle, SQLServer or Sybase.

5 Right-click the file associated with the appropriate database (Oracle Uninstall, SQLServer Uninstall or Sybase Uninstall) and select Run.

Modify Scripts

1 Expand the SeeBeyond folder in the Project Explorer.

2 Expand the eInsight folder that is located under the SeeBeyond folder.

3 Expand the Run Database Scripts folder.

4 From the Run Database Scripts folder, select the script you will modify.

5 Right-click and select Open to view the script and make changes.

Note: *You will be prompted to Save or Discard your changes when you close the script.*

8.1.3 Download Database Scripts

This is an alternative method to **"Run the Business Process Database Script" on page 68**. You may wish to download the database scripts and run them outside of the ICAN environment.

Download the compressed script files

To create the runtime recoverability database schema, you can download a Database Script that is automatically installed with eInsight.

1 Expand the SeeBeyond folder in the Project Explorer.

2 Expand the eInsight folder that is located under the SeeBeyond folder.

3 Expand the Download Database Scripts folder.

4 Select the appropriate database file: Oracle, SQLServer or Sybase.

5 Right-click the file associated with the appropriate database (Oracle.zip, SQLServer.zip or Sybase.zip) and select Export.

6 Unzip the database script to a local folder.

Included in the zipped file are:

- install_db.bat - This script will create the tablespace, users, tables, stored procedures, and any initial value.

- uninstall_db.bat - This script reverses what the install_db.bat script creates (drops tables and users, deletes stored procedures).

- database specific sql scripts - These scripts are called by the install_db.bat and uninstall_db.bat commands (such as, create_tables.sql, drop_tables.sql, etc.)

- A Readme.txt file with additional instructions, specific to your database application.

7 Follow the specific instructions in the Readme.txt file, for your database.

To execute Database Scripts

1 Open a command window and navigate to the directory where script is located.

Important: *The database user that executes these scripts must have permission to create tables.*

2 Enter the following at the command prompt, as shown in Figure 43:

```
install_db <user> <password> <tns>
```

- <user> is the database username

- <password> is the database user password

- <tns> is the database or tns name

Figure 43 Install_db.bat
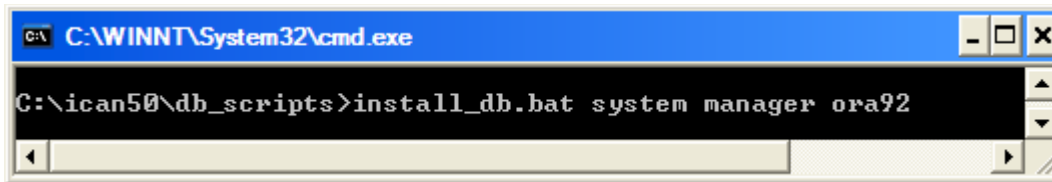
Note: *The default user and password created from these scripts is "einsight". You can modify the user, password, disk space allocated for tables, and user permissions. The table and column definitions should not be modified.*

8.1.4 Configure Persistence for the Business Process

1 Right-click your Business Process and select Open Property Sheet.

2 Select Yes for the Persist State option, as shown in Figure 44.

You set the persistence state for individual business processes. The default setting is no for Persist State.

Figure 44   Business Property Sheet
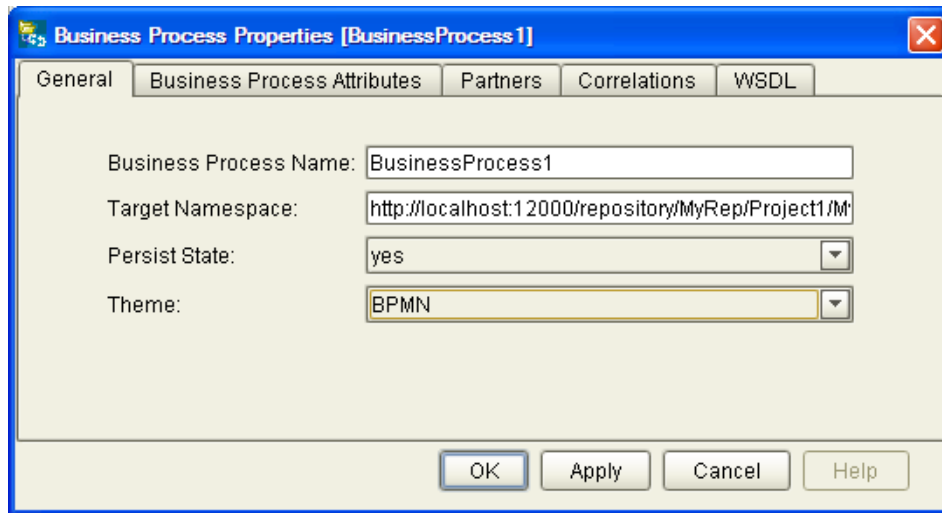
3 Click the Save All toolbar icon.

This creates a Database Install Script option under your Business Process.

Configure connection information

1 Right-click the Database Install Script under the Business Process and select Properties.

Figure 45   Properties of Database Scripts
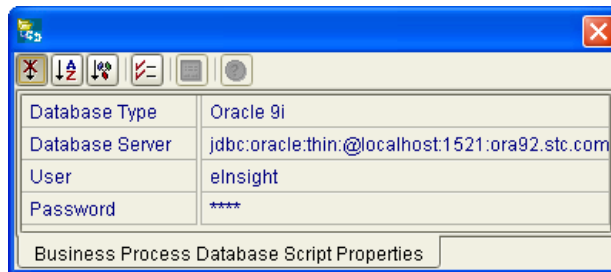
2 Enter the connection information for your database (as shown in Figure 45).

Run the Business Process Database Script

1 From the Project Explorer, expand your Business Process.

2 Expand the Database Scripts folder.

3 From the Database Scripts folder, right-click the appropriate database and select Run.

The scripts complete the database creation process.

Uninstall Script for the Business Process

1 From the Project Explorer, expand your Business Process.

2 Under the Business Process, expand the Database Scripts folder.

3 Right-click the appropriate uninstall script and choose Run.

8.2 Monitoring

The Enterprise Manager allows users to quickly identify problems with components or systems. From the Enterprise Manager, you can double-click on business process components to go directly to the problem.

From the Enterprise Manager (Monitoring interface), you can:

- Filter the list of displayed instances to quickly identify exceptions.
- Navigate to particular versions of a Business Process to monitor the progress of instances.
- Use a Web based interface allows users to securely access the monitoring environment over the internet.

Once persistence is configured, you can use the Enterprise Manager to monitor your business process instances.

It is important that you use the following procedures to ensure the proper view of the business process appears in the monitor:

To monitor a new business process

1 Open and save each business process.

Note: *If your business process has any User Activities or special OTDs, you should also open and close each of these to make sure they will register with the monitor.*

2 Right-click each business process and select Check In.

3 Right-click each business process and select Check Out.

4 Rerun the database scripts (see **Run Database Scripts** on page 65).

5 Save the business process.

6 Activate the deployment profile.

7 Launch the Enterprise Manager.

8 Select the Home tab.

9 Select the Monitor icon to bring up the tree structure which allows you to navigate through projects or environments.

10 Select the Projects tab.

11 Navigate to the correct Project/Deployment Profile/Connectivity Map, and select the Business Process name.

Figure 46 Monitor View

To monitor a modified business process

1 Check Out the Business Process (if necessary).

2 Modify the business process.

3 Click Save to save the changes.

4 Right-click the business process and select Check-In.

5 Right-click the business process and select Check-Out.

6 Run the database script (see **Run Database Scripts** on page 65).

7 Activate the deployment profile.

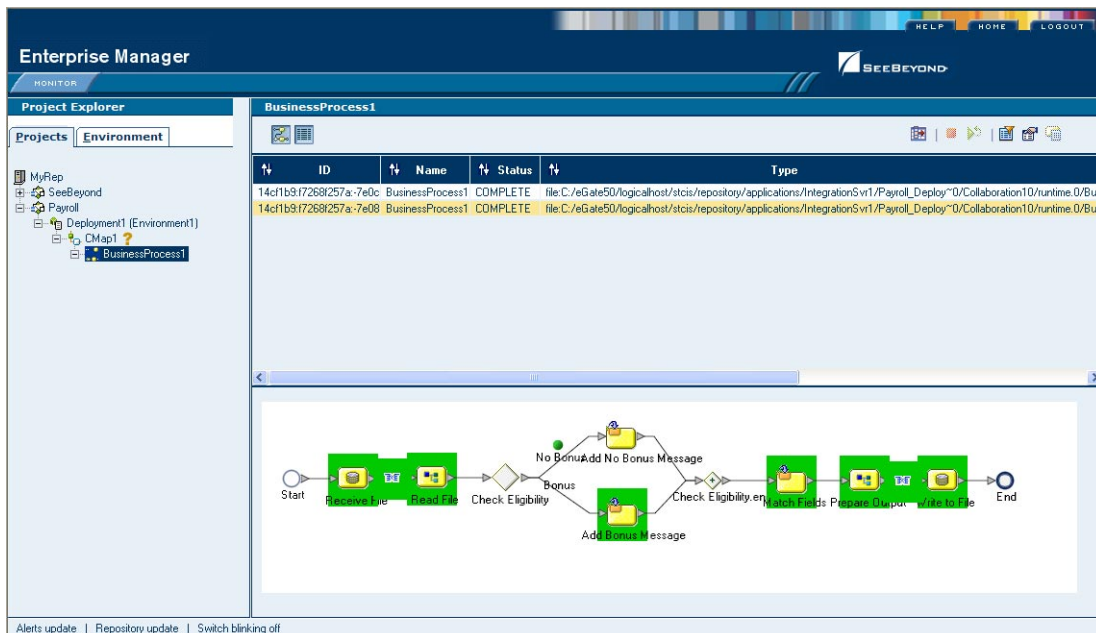**To monitor an imported project**

1 Import the project.

2 Check Out the business process(es).

3 Open and save each business process.

Note: *If your business process has any User Activities or special OTDs, you should also open and close each of these to make sure they will register with the monitor.*

4 Right-click each business process and select Check In.

5 Right-click each business process and select Check Out.

6 Rerun the database scripts (see **Run Database Scripts** on page 65).

7 Save the business process.

8 Activate the deployment profile.

9 Launch the Enterprise Manager.

10 Select the Home tab.

11 Select the Monitor icon to bring up the tree structure which allows you to navigate through projects or environments.

12 Select the Projects tab.

13 Navigate to the correct Project/Deployment Profile/Connectivity Map, and select the Business Process name.

8.2.1 Monitoring Options

Using the monitor console, you can view and interact with Business Processes instances in both Project and Environment views.

- In Project view, you can start, stop and set the cache.

- In Environment view, you can start, stop, and examine Business Process Instances using an exact graphical model of the business process.

Business Process Monitoring Tools

Interactive monitoring tools allow you to control the view of Business Process Instances, and manage the display of Instance details. The monitor console provides a suite of controls arrayed in toolbar format across the top of the Details window. Before you start monitoring, you should be well acquainted with these tools. This page describes the tools, in left-to-right order, as they appear in the console.

Controlling the Business Process display mode

The display of Business Process Instances and the Instance List in the console viewer are controlled by the buttons described in the following table. (These buttons are located in the upper left of the Details window.)

Table 7 Monitor: Display Mode

	Hide SVG hides the rendered image of a Business Process Instance in the **Details** window.
	Show SVG renders the image of a Business Process Instance in the **Details** window.
	Show Instance List displays the attributes of the current Business Process Instance in list format, and adds the tools described in the following table.
	Hide Instance List hides the attributes of the current Business Process Instances, and removes the instance tools from the interface.

Controlling the display of instance data

When the monitor is in Instance monitoring mode, you can manipulate the view of Instance data using the buttons described in the following table. (These buttons are located in the upper right of the Details window).

Table 8   Monitor: Display Instance Data

	Choose Preferences allows you to add, move, and sort the columns in the Business Process Instance.
	Start starts a stopped Business Process Instance.
	Stop stops a Business Process Instance.
	Filter Instances allows you to set criteria to display a specific instance or group of Instances.
	Business Process Instance Attributes displays the attributes of an Instance when the instance is selected in the **Instance List**.
	Activity Details allows you to see the details of an Activity. Defines a step within a particular Business Process. when the Activity is selected in the **Instance List**.

Note: *Please see the Enterprise Manager Help for more information about monitoring business processes.*

<div align="right">

Chapter 9

</div>

Implementation

The case study in this chapter is designed to illustrate functionality, in addition to showing a working example of a business process implementation.

9.1 Overview

Implementing a business process is translating the vision of the business user into a functioning system. You implement a business process model by using modeling components. Business process modeling components are mostly pre-configured but some may require modification.

About the Sample

This chapter will guide you through creating a simple eInsight project or you may download and import the project, instead.

This sample and the accompanying files can be found in the eInsight_Sample.zip file. You may download the eInsight_Sample.zip file from the Documentation tab of the Enterprise Manager. It is one of the files avaialble when your upload the eInsightDocs.sar file.

Download the eInsight Sample Project

1   Open the Enterprise Manager and click on the Documentation tab.

2   Select eInsight Business Process Manager from the Products list.

3   Select Download Sample and save to your local drive.

This compressed file contains the eInsight_Payroll_Sample.zip file as well as:

- input.dtd
- output.dtd
- bonus.xml
- no_bonus.xml

Import the Sample Project

To run the project, you must import the eInsight_Payroll_Sample.zip file.

1   Right-click your Repository folder in the Enterprise Explorer and select Import.

The Import Manager dialog appears.

2 Click Browse and find eInsight_Payroll_Sample.zip.

3 Select the file and click Import. Close the Import Manager dialog.

4 Click Refresh all from Repository in the Enterprise Explorer toolbar.

Once the import is complete, you will still need to read **"Create a new Environment" on page 78** and **"Step 5: Run and Test the System" on page 75** to make your sample run.

9.1.1 Road Map

Each type of implementation involves a different approach, however, there are certain similarities. To give you an overview of the complete process, the following implementation road map contains high-level steps for this implementation. The road map is further refined and given more detail in the case study that immediately follows.

Figure 47, illustrates the major steps in the integration process for this implementation.

Figure 47   Integration Road Map
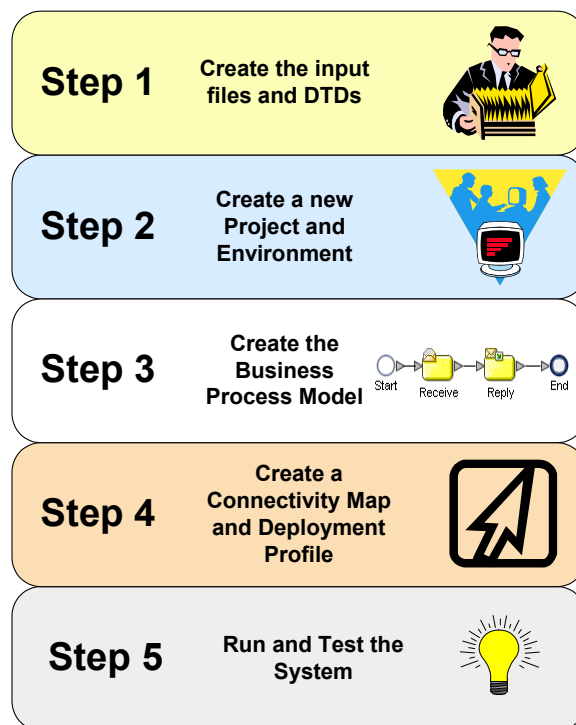
Step 1: Create the Input Files and DTDs

The first step in this implementation requires that you create two input files for the system. In an actual implementation, your input files may come from an external system.

The first step also entails creating your Document Type Definition (DTD) files. The DTD file tells the system which elements it should expect from the input files and how to format the output data.

Step 2: Create a New Project and Environment

In the second step of this implementation, you will create a new Project where your business process will reside and a new Environment for your Project.

Step 3: Create the Business Process Model

In this step, you will create a new business process, add the modelling elements and link them together. You will also configure the modelling elements and links to process the data.

Step 4: Create a Connectivity Map and Deployment Profile

When you create the Connectivity Map, you are making the connections between the system components and the external systems. You will also create a Deployment Profile that you will activate when you put the system into production.

Step 5: Run and Test the System

To run the system, you must invoke the Bootstrap. This action will pick up your Deployment Profile and execute your business process. Once the system processes your input files, an output file is created. To verify that this implementation has completed properly, check the output file.

9.2 Case Study: Payroll Processing

This case study begins with a description of the scenario and then shows how to set it up. The case study discussed in this chapter illustrates a simplified implementation of payroll processing. In this case, eInsight receives payroll data as XML files.

Once eInsight has received the data, a check is made to see if the employee is eligible for a bonus, if they are, the bonus is set. Finally, the payroll is processed and a message added to the paystub, indicating whether a bonus was paid. Figure 48 shows the components involved in the business process implementation.

Figure 48   Business Process Model
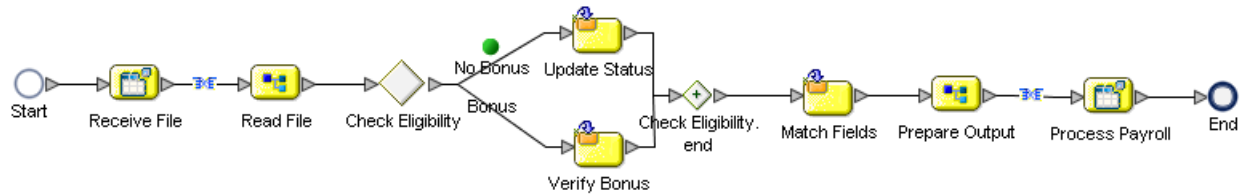
1   The first File eWay picks up the input XML files containing the employee's information from a local folder on your computer. The payroll information is used to start a business process instance. eInsight retrieves the information and uses it to execute the decision logic.

2   eInsight uses the decision logic information it contains to check the employee's probation status and continues along one path or the other, depending on that status.The decision logic determines whether the employee is eligible for a bonus, and then moves forward to the next activity in the business process based on the result.

3   If the employee is eligible for a bonus, the next activity is **Set Bonus**; if the employee is not eligible, the next activity is **Update Status**.

   ▪ Let's assume the employee is not eligible for a bonus because they have been employed for less than three months. The Probation status is *true*, therefore eInsight proceeds to the corresponding activity, **Update Status,** in the business process. Once the Comment and Bonus fields are updated, eInsight moves forward to the next activity in the business process—**Match Fields**.

   ▪ Otherwise, the employee is eligible for a bonus and eInsight uses the information to verify eligibility. When the **Verify Bonus** activity is finished, eInsight moves forward to the next activity in the business process—**Match Fields**.

   ▪ The **Match Fields** activity uses the Business Rule function to match the data fields in your input file to the data format of your output file.

4   eInsight then proceeds to the **Prepare Output** activity and finally the **Process Payroll** activity. **Process Payroll** is a File eWay that performs two functions: it sends a status report to the payroll system, and also writes the data to the output file.

5   eInsight has performed the final activity in the business process and completes successfully.

9.2.1 Before You Begin

To complete this exercise, you need to have the following:

   ▪ ICAN 5.0 products installed:

      ◆ eGate Integrator

      ◆ eInsight Business Process Manager

      ◆ File eWay

   ▪ A directory on your local drive named **data**.

Input Files and DTDs

The sample system you are creating requires input information. For this exercise, you will create two input files: **Bonus.xml** and **No Bonus.xml**. These files are in an XML format. You do not need to have an XML editor to create these files. Any simple text editor will work.

The system you are creating also needs a structure for receiving information. That structure is described in the Document Type Definition (DTD) files.

Input XML Files

The XML files that you create here, contain the data that the system receives and changes to create your final output.

Create the Input files

1 Copy the following code sections each to separate text files:

- Bonus.xml

```
<?xml version="1.0" encoding="UTF-8"?>
    <Payroll>
        <FirstName>Vanessa</FirstName>
        <LastName>Smith</LastName>
    <Probation>false</Probation>
        <Comments></Comments>
        <Bonus></Bonus>
    </Payroll>
```

- **No Bonus.xml**

```
<?xml version="1.0" encoding="UTF-8"?>
    <Payroll>
        <FirstName>Tonya</FirstName>
        <LastName>Lee</LastName>
    <Probation>true</Probation>
        <Comments></Comments>
        <Bonus></Bonus>
    </Payroll>
```

2 Rename the files to **Bonus.xml** and **No Bonus.xml**.

3 Save the files to **C:\data**.

Input and Output DTD Files

Create the Document Type Definitions

These files are later used to define the way data is mapped in the system.

1 Copy the following code sections each to separate text files:

- **Input.dtd**

```
<?xml version="1.0" encoding="UTF-8"?>
<!ELEMENT Payroll (FirstName, LastName, Probation, Comments, Bonus)>
<!ELEMENT FirstName (#PCDATA)>
<!ELEMENT LastName (#PCDATA)>
<!ELEMENT Probation (#PCDATA)>
<!ELEMENT Comments (#PCDATA)>
<!ELEMENT Bonus (#PCDATA)>
```

▪ **Output.dtd**

```
<?xml version="1.0" encoding="UTF-8"?>
<!ELEMENT Payroll (FName, LName, Message, BonusTotal)>
<!ELEMENT FName (#PCDATA)>
<!ELEMENT LName (#PCDATA)>
<!ELEMENT Message (#PCDATA)>
<!ELEMENT BonusTotal (#PCDATA)>
```

2 Rename the files to **Input.dtd** and **Output.dtd**.

3 Save the files to a local folder.

9.2.2 Create a New Project and Environment

Create a new Project

1 Launch the Enterprise Designer.

2 Right-click your Repository and select **Project.**

A new Project appears in your Project Explorer tree structure.

3 Rename the Project to **Payroll**.

4 Click the **Save All** toolbar button to save your changes.

Add the Input and Output DTD files to your Project

1 Right-click your Payroll Project and select **New: Object Type Definition**.

The **New Object Type Definition Wizard** appears.

2 Select the **DTD** option from the choices given.

3 Click **Next** to continue.

4 Navigate to the local folder where your **Input.dtd** and **Output.dtd** files are located.

5 Select the **Input** and **Output** DTD files. (You can select multiple files using the CTRL key).

6 Click **Next** to continue.

The **Select Document Elements** dialog appears.

7 Select both **DTD** files.

8 Click **Next** to continue.

The **Select OTD** dialog appears.

9 Click **Finish** (do not change any of the default settings).

Environment

Create a new Environment

1 Select the **Environment Explorer** tab from the Enterprise Designer.

2 Right-click on your **Repository** and select **New Environment**.

3 Right-click on your **Environment** and select **New Logical Host**.

4 Right-click on your **Environment** and select **New File External System**.

The system prompts you to name the **File External System**.

5 Enter **Pay_IN** as the name of your **File External System**.

6 Select **Inbound File eWay** as the **External System Type**.

7 Repeat step 4 and name the **File External System**: **Pay_OUT**.

8 Select **Outbound File eWay** as the **External System Type**.

9 Right-click the **Logical Host** and select **New SeeBeyond Integration Server**.

Your new Environment will look like Figure 49.

Figure 49   New Environment
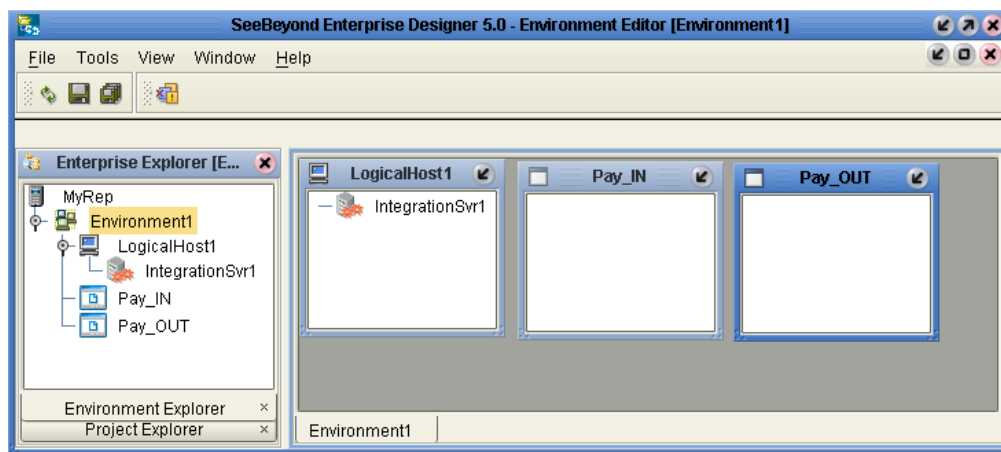
9.2.3 Create the Business Process Model

Create a new Business Process

1 Click the **Project Explorer** tab and right-click on your **Payroll** project.

2 Select **New**: **Business Process**.

A new Business Process appears in your directory tree under your Payroll project and a blank Business Process appears in the Business Process Designer (right pane).

Add Modelling Elements to the Business Process Model

This section contains detailed instructions to build your model.

Add the File Receive Activity

This activity uses an inbound **File eWay**.

1 Double-click the **SeeBeyond Project** from the Project Explorer tree view.

2 Double-click **eWays** under the SeeBeyond Project.

3 Double-click **File** under eWays.

4   Double-click **FileClient** under File.

5   Select and drag the **Receive** activity from **FileClient** to the Business Process Designer.

6   Place the **Receive** activity to the right of the **Start** activity.

Add the Unmarshal Activity

This activity unmarshalls the input data.

1   Double-click your **Payroll** project from the Project Explorer tree view.

2   Expand the **Input_Payroll DTD**, located under your Project.

3   Select and drag the Input_Payroll **Unmarshal** activity.

4   Place the activity to the right of the **FileClient Receive** activity.

Add the Decision Element

The decision element contains logic that determines what will happen to the incoming data. You will configure the logic in a later step.

1   Select **Branching Activities** from the Business Process Toolbar.

2   Select **Decision** from the **Branching Activities** drop-down list.

3   Drag the **Decision** to the Business Process Designer.

    The **Decision** element and **Decision.end** appear on the Business Process Designer canvas.

4   Place the Decision to the right of the **input _Payroll.unmarshal** activity. Leave a space between the Decision and Decision.end.

Add the Business Rule Activities

The Business Rule Activities allow you to map and transform data. You will configure the Business Rule Activities later in this exercise.

1   Select the **Business Rule** Activity from the Business Process Toolbar and drag the activity to the Business Process Designer.

2   Repeat step 1 until you have three **Business Rule Activities** on your canvas.

3   Group the **Business Rule Activities** as shown in Figure 50.

Figure 50   Building the Model
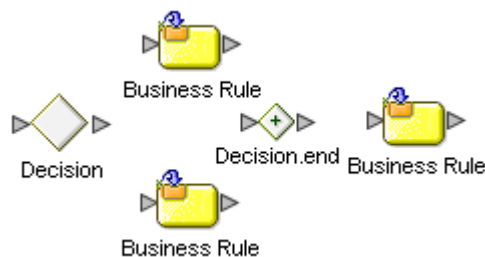
Add the Marshal Activity

This activity marshals the data and prepares it for output.

1 Double-click your **Payroll** project from the Project Explorer tree view.

2 Click the icon next to **output_Payroll DTD** to expand.

3 Select and drag the output_Payroll DTD **Marshal** operation to the Business Process Designer.

4 Place the activity to the right of the last **Business Rule** Activity.

**Add the File Write Activity**

This activity is an outbound **File eWay**.

1 Double-click the **SeeBeyond Project** from the Project Explorer tree view.

2 Double-click **eWays** under the SeeBeyond Project.

3 Double-click **File** under **eWays**.

4 Double-click **FileClient** under **File**.

5 Select and drag the **Write** activity from **FileClient** to the Business Process Designer.

6 Place the **Write** activity to the left of the **End** activity.

9.2.4 Configure Modeling Elements

Draw links to connect the model

1 Move your mouse over the **Start** activity until a hand appears.

2 Click and hold your mouse to drag a **Link** between the elements.

3 Repeat steps 1 and 2 to connect the entire model as shown in Figure 51

Figure 51 Linked Model
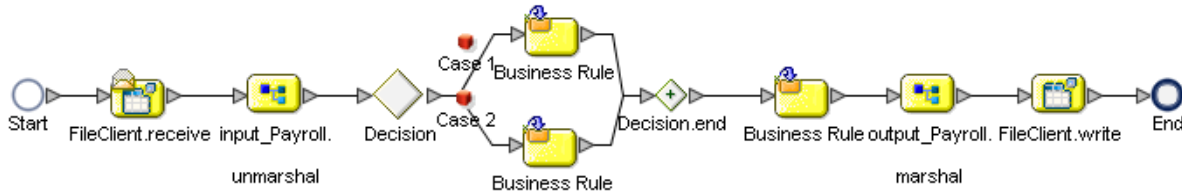
Rename Modeling Elements

You should rename the elements to represent the activity's role in the business process. This makes it easier to understand the model.

1 From the Business Process Designer, click an element label (the name or title under the activity).

   A sunken box appears around the label.

2 Type to rename the element.

3 See Table 9 and rename each of the elements as described in steps 1 and 2.

Table 9 Rename Elements

Current Name	Rename to
FileClient.Receive	Receive File
input_Payroll.unmarshal	Read File
Decision	Check Eligibility
Case 1	Bonus
Case 2	No Bonus
Business Rule (upper)	Update Status
Business Rule (lower)	Set Bonus
Business Rule	Match Fields
output_Payroll.marshal	Prepare Output
FileClient.write	Process Payroll

Configure Business Rules

Add Business Rules to Links

There are two links in this exercise that use Business Rules applied to links, to move data through the business process model.

1 From the Business Process Designer, select the link between **Receive File** and **Read File**.

2 Right-click on the link and select **Add Business Rule**.

3 Double-click the link with the new Business Rule icon or select the toolbar icon called **Map Business Process Attributes**.

   The Business Rules Designer appears in the lower pane of the Business Process Designer.

4 Link the **text** node to the **contents** node, as shown in **Figure 52 on page 83**.

Figure 52 Add Business Rules to Links
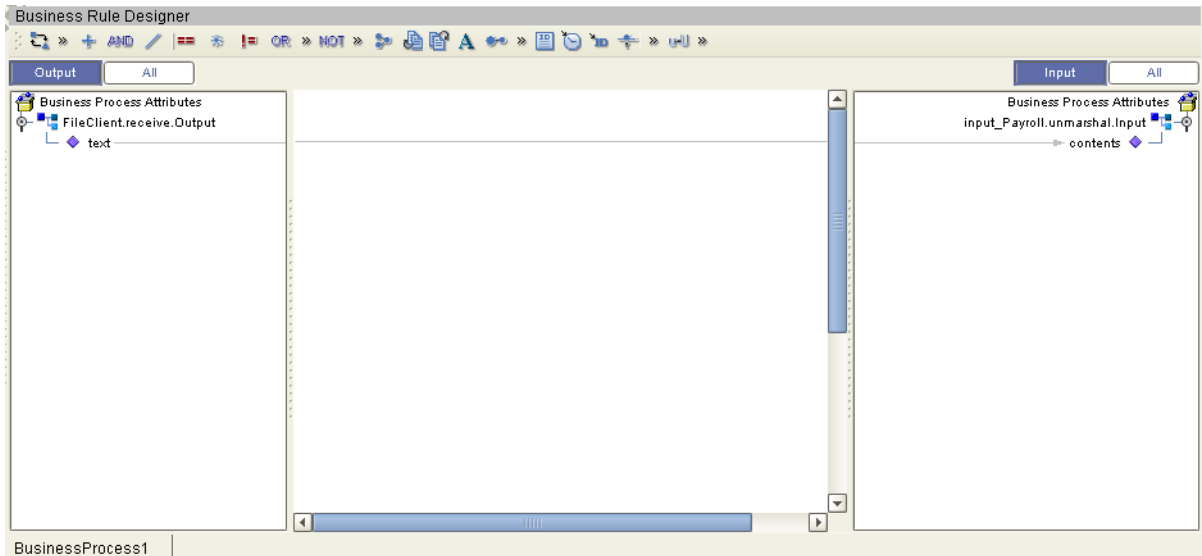
5   Select the link between **Prepare Output** and **Process Payroll**.

6   Right-click on the link and select **Add Business Rule**.

7   Double-click the link with the new Business Rule icon or select the toolbar icon called **Map Business Process Attributes**.

The Business Rules Designer appears in the lower pane of the Business Process Designer.

8   Link the **contents** node to the **text** node.

Decision Element

Configure the Decision Logic

1   Double-click the **Decision** element.

The **Decision Gate Properties** dialog appears, shown in Figure 53.

Figure 53 Decision Properties
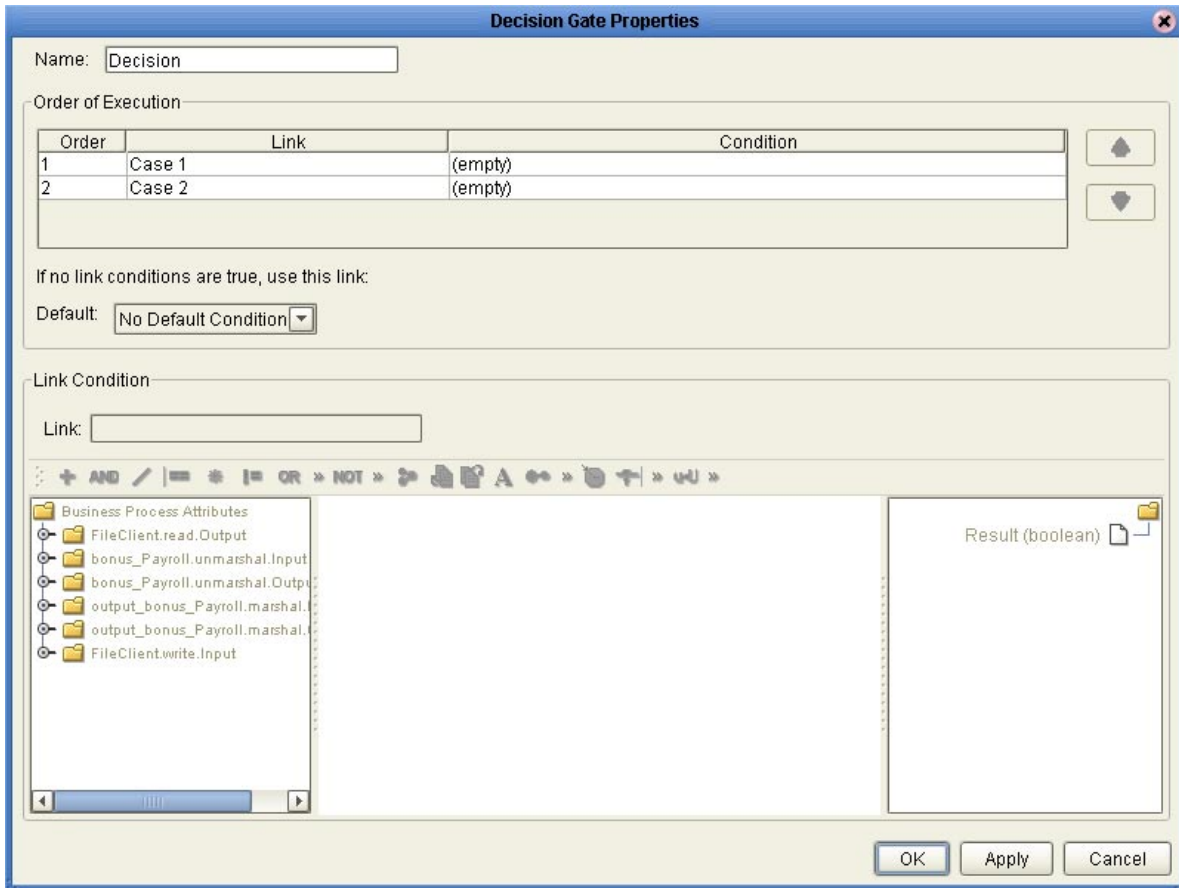
Configure Case 1

2 Select the case: **No Bonus**.

3 Select the **String Literal** icon from the **Method Pallet** and drag it to the Business Rules Designer.

   The **Input** dialog appears.

4 Type **true** and click **OK**.

5 Select the **equal** method from the Method Pallet and drag it to the Business Rules Designer.

6 In the **Link Condition** section, find the **input_Payroll.unmarshal.Output** node and expand it.

7 Expand the **Payroll** node and select **Probation**.

8 Drag a link from the **Probation** node and connect it the **equal** method box, where you see **Any 1**.

9 Drag a link from the **equal** method box where you see **Any 2** to the **String Literal** method box, and connect.

10 Drag a link from the **Return Boolean** section of the **equal** method box, to the **Result (boolean)** pane on the right.

Your **Decision** mapper should look like **Figure 54 on page 85**.

Figure 54 Completed Decision Gate Properties
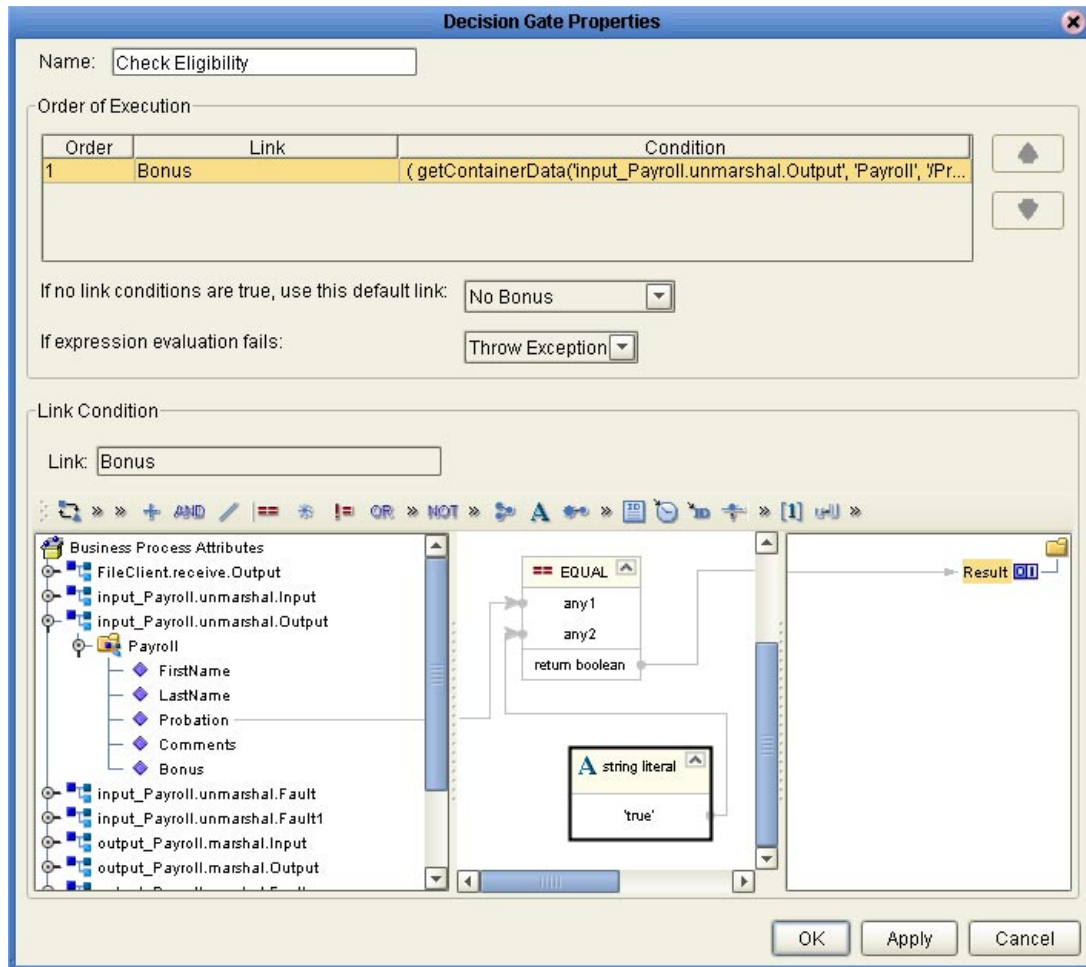
Configure Case 2

    1 Select the case: **Bonus**.

    2 Locate the **Default Condition** drop-down menu.

    3 Click **OK** to exit the **Decision Gate Properties** dialog.

Your business process model should look like **Figure 48 on page 76**.

9.2.5 Configure Business Rule Activities

Update Status Activity

If an employee, in our example, is on Probation, the employee is ineligible for a bonus. In this case, the activity will take the path of the **Update Status** Activity. The **Comments** field is set to let the employee know that they are ineligible for a bonus and the **Bonus** field is set to **$0.00**.

Configure the Update Status Activity

1 Select the **Update Status** Activity.

2 Click the **Map Business Process Attributes** toolbar icon to see the Business Rules Designer.

3 Drag the **Concat** method onto the Business Rules Designer from the Method Palette.

4 Drag the **String Literal** method onto the Business Rules designer from the Method Palette.

The **Input** dialog appears.

5 Type **Not Eligible for Bonus**.

6 Link the **String Literal** method to **string1** on the **Concat** method

7 On the left pane, expand the **input_Payroll.unmarshal.Output** node and then expand the **Payroll** node.

8 Select **Comments** and drag a link to **string2** on the **Concat** method.

9 On the right pane, expand the **input_Payroll.unmarshal.Output** node and then expand the **Payroll** node.

10 Drag a link from **Return String** on the **Concat** method to **Comments** on the right pane.

11 Drag another **Concat** method onto the Business Rules Designer from the Method Palette.

12 Drag a **String Literal** method onto the Business Rules designer from the Method Palette.

The **Input** dialog appears.

13 Type **$0.00** to set the Bonus amount.

14 Link the **String Literal** method to **string1** on the **Concat** method

15 On the left pane, expand the **input_Payroll.unmarshal.Output** node and then expand the **Payroll** node.

16 Select **Bonus** and drag a link to **string2** on the **Concat** method.

17 On the right pane, expand the **input_Payroll.unmarshal.Output** node and then expand the **Payroll** node.

Drag a link from **Return String** on the **Concat** method to **Bonus** on the right pane.

When you are done, your screen should look like Figure 55.

Figure 55 Update Status Activity
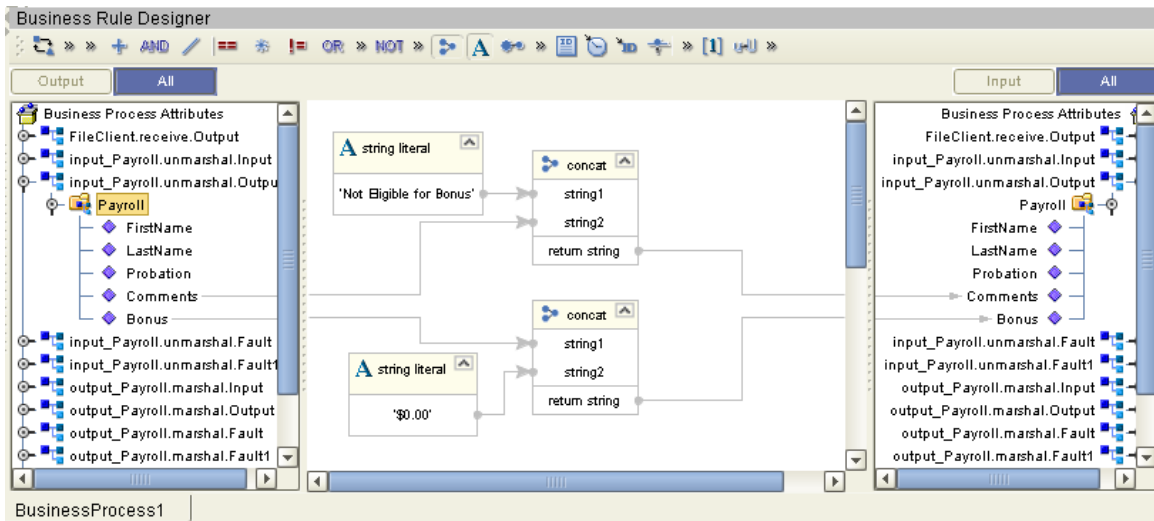
Set Bonus Activity

The S**et Bonus** Activity sets the **Bonus** and **Comments** fields for employees that are eligible for a **Bonus**.

1 Select the **Set Bonus** Activity.

2 Click the **Map Business Process Attributes** toolbar icon to see the Business Rules Designer.

3 Drag the **Concat** method onto the Business Rules Designer from the Method Palette.

4 Drag the **String Literal** method onto the Business Rules Designer from the Method Palette.

   The **Input** dialog appears.

5 Type **Eligible for Bonus**.

6 Link the **String Literal** method to **string1** on the Concat method

7 On the left pane, expand the **input_Payroll.unmarshal.Output** node and then expand the **Payroll** node.

8 Select **Comments** and drag a link to **string2** on the **Concat** Method.

9 On the right pane, expand the **input_Payroll.unmarshal.Output** node and then expand the **Payroll** node.

10 Drag a link from **Return String** on the **Concat** method to **Comments** on the right pane.

11 Drag another **Concat** method onto the Business Rules Designer from the Method Palette.

12 Drag a **String Literal** method onto the Business Rules Designer from the Method Palette.

   The **Input** dialog appears.

13   Type **$1500** to set the bonus that all eligible employees will receive.

14   Link the **String Literal** method to **string1** on the **Concat** method

15   On the left pane, expand the **input_Payroll.unmarshal.Output** node and then expand the **Payroll** node.

16   Select **Bonus** and drag a link to **string2** on the **Concat** Method.

17   On the right pane, expand the **input_Payroll.unmarshal.Output** node and then expand the **Payroll** node.

18   Drag a link from **Return String** on the **Concat** method to **Bonus** on the right pane.

When you are done, your screen should look like Figure 56.

Figure 56   Set Bonus Activity
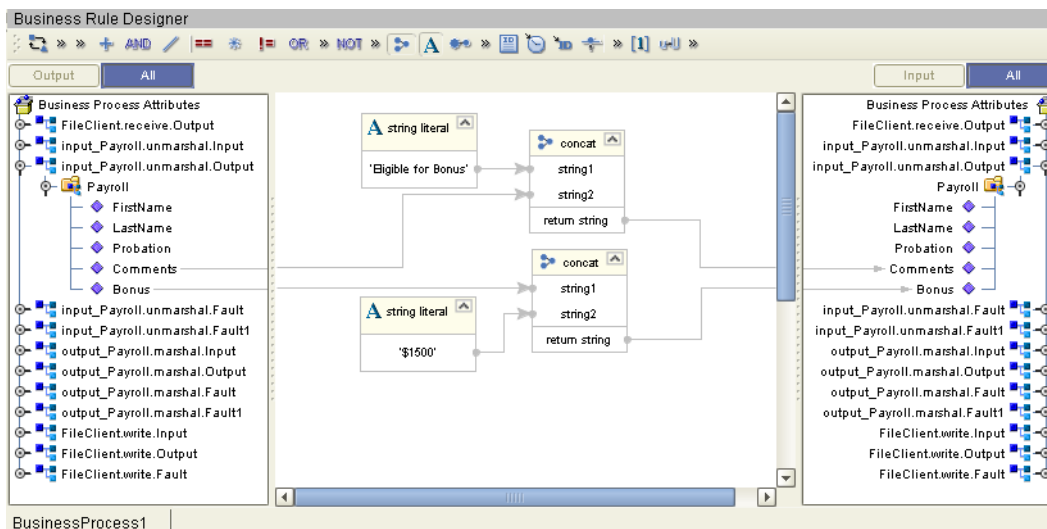
Match Fields Activity

The Match Fields Activity maps the input data into the proper format for output.

1   Select the **Match Fields** Business Rule Activity.

2   On the left pane, expand the **input_Payroll.unmarshal.Output** node and then expand the **Payroll** node.

3   On the right pane, expand the **output_Payroll.marshal.Input** node and then expand the **Payroll** node.

4   Draw a link between the following fields:

Table 10   Match Fields

From	To
FirstName	FName
LastName	LName
Comments	Message

Table 10 Match Fields

From	To
Bonus	BonusTotal

Your screen will look like Figure 57, when you are finished.

Figure 57 Match Fields Activity
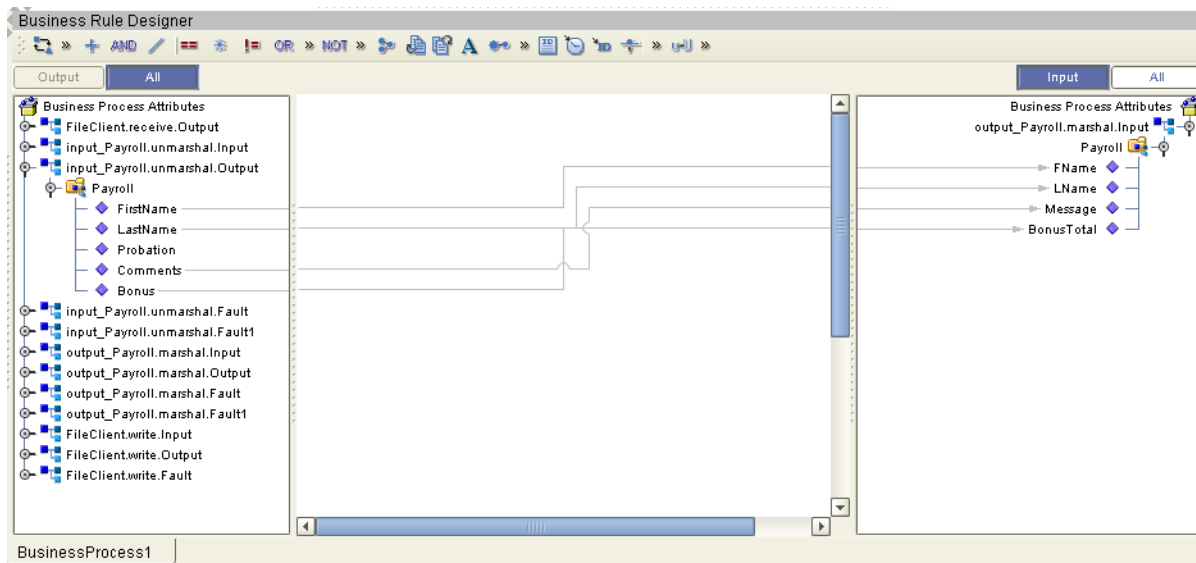
9.2.6 Create a Connectivity Map and Deployment Profile

Create the Connectivity Map

1 Right-click your Project and select **New: Connectivity Map**.

   A new node will appear under your Project. The default name is **CMap1**.

2 Select the **External Applications** toolbar icon and select **File External Applications**.

3 Drag the **File** icon to the Connectivity Map canvas.

4 Drag a second **File** icon to the canvas.

5 Select **BusinessProcess1** from the Project Explorer and drag it to the canvas.

6 Place the **Business Process** between the two **File** icons.

Configure the Business Process

1 Select your **Business Process** from the Project Explorer and drag it to the canvas.

2 Double-click the **Business Process**.

   The **Business Process Service** dialog appears as shown in Figure 58.

3 Drag a link from **File Sender** Service to the **File1** icon.

4 Drag a link from the **File Receiver** Service to **File2** icon.

5   Click the minimize button on the **Business Process** dialog to close the dialog.

Figure 58   Configure Binding
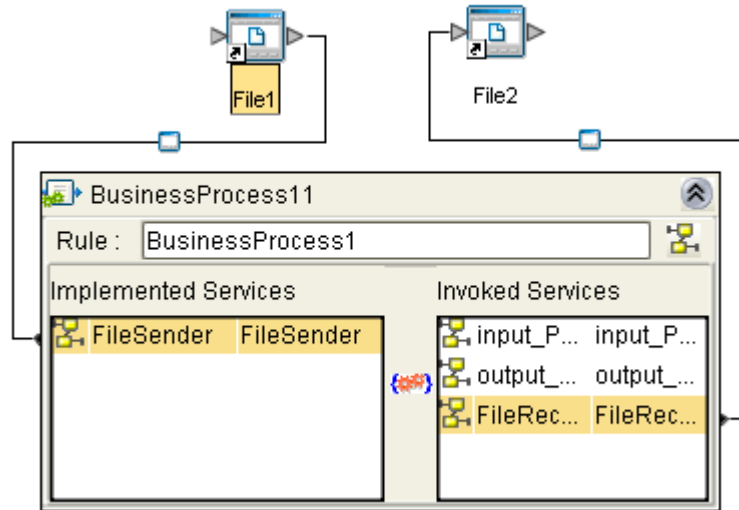
Configure the File Systems

Configure the Inbound File eWay

1   Double-click the link to **File_input** to configure it.

The **Templates** dialog appears.

2   Select Inbound **File eWay** and select **OK**.

The **Properties** dialog appears, as shown in **Figure 59 on page 91**.

3   Change the **Directory** to **C:\data**.

Figure 59 Inbound File eWay
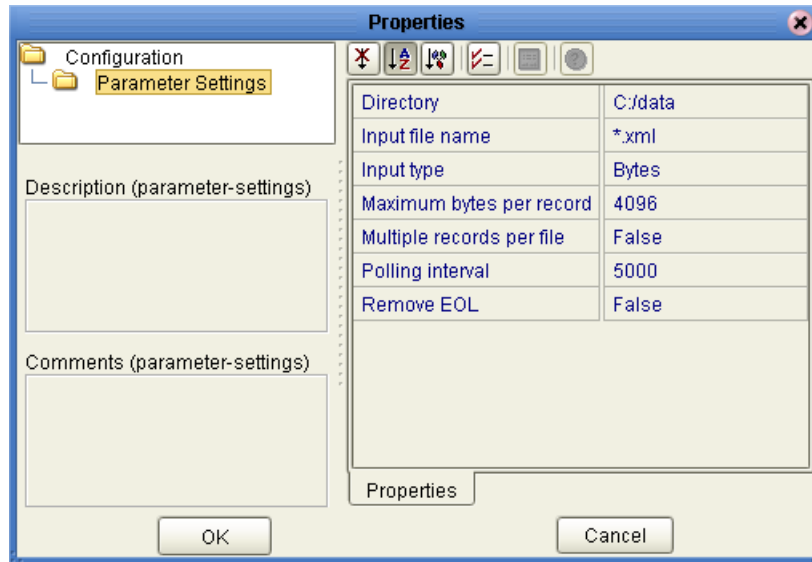
4   Change **Input** file name to ***.xml**.

5   Click **OK** to save changes.

Configure the Outbound File eWay

1   Double-click the link **File_output** to configure it.

2   Connect File Receiver to **File_output**.

The **Templates** dialog appears.

3   Select **Outbound File eWay** and select **OK**.

The **Properties** dialog appears, as shown in **Figure 60 on page 92**.

4   Change the **Directory** to **C:\data**.

Figure 60   Outbound File eWay
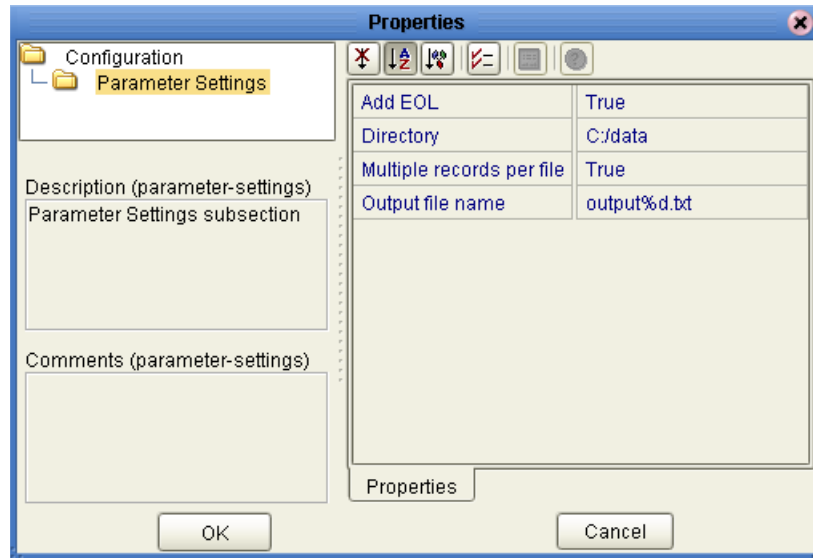
5   Change the **Output** file name to **output%d.txt.**

6   Click **OK** to save changes.

Deployment Profile

Create the Deployment Profile

1   Right-click your **Project** from the **Project Explorer**.

2   Select **New: Deployment Profile**.

3   The **Create Deployment Profile** dialog appears.

4   The **Deployment Profile** is called **Deployment1** by default. You can accept the default name.

5   Select the **Environment** (**Environment1**) that you created previously.

Configure the Deployment Profile

1   Drag **BusinessProcess11** from the middle pane to the **Integration Server** (**IntegrationSvr1**) located in the **LogicalHost** window.

2   Drag **File1 -> BusinessProcess11** from the middle pane to the **Pay_IN** window.

3   Drag **BusinessProcess11 -> File2** to the **Pay_OUT** window.

4   Click **Activate**.

Figure 61   Deployment Profile
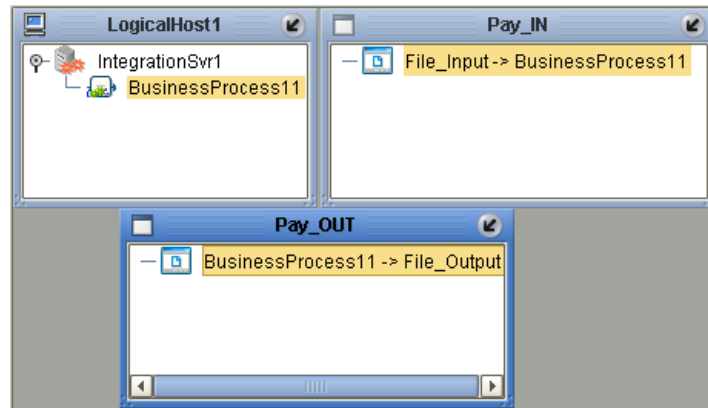
5   Click **No**, so the change will not apply to the **Logical Host** immediately. (This is because your Logical Host is not running yet.)

9.2.7 Run and Test the System

Start the Logical Host

The Bootstrap process executes your **Payroll Project** and begins the process of polling your input data. The Bootstrap process is performed from a command prompt. Bootstrap will pick up the deployment profile the first time it runs; after that you would select reactivate and click **Yes** to apply the most recent changes to the Logical Host.

Note: *The Bootstrap command is case sensitive on Windows.*

To run the Bootstrap

1   Open a Windows command prompt as shown in the following Figure 62.

2   Navigate to where you installed the Logical Host; for example, **ican50\logicalhost\bootstrap\bin**, then type the following command:

```
CD \ican50\logicalhost\bootstrap\bin
```

3   To start the Bootstrap process, type the following command:

```
bootstrap -e environment_name -l logicalhost_name
 -r repository_URL -i username -p password
```

environment_name is the name of your environment (for example, *Environment1*),

logicalhost_name is the name of your Logical Host (for example, *LogicalHost1*),

repository_URL is the full URL of your Repository including the Repository name (for example, *http://localhost:12000/MyRep*),

username is your user name, and

password is your password.

Figure 62   Bootstrap Command Example

```
C:\WINDOWS\System32\cmd.exe

C:\ican50\logicalhost\bootstrap\bin>bootstrap - Environment1 -l LogicalHost1 -r
http://localhost:12000/MyRep -i Administrator -p STC
```
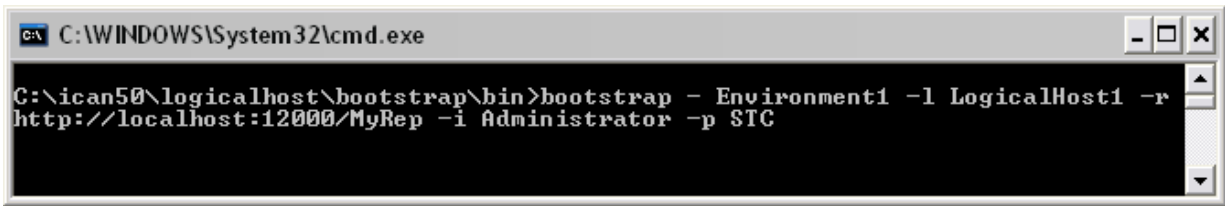
Check output

1 Navigate to **C:\data** and check for an **output.txt** file.

2 Open the **output.txt** file and examine the data. It will look like this:

```
<?xml version="1.0" encoding="UTF-8"?>
<Payroll>
     <FName>Vanessa</FName>
     <LName>Smith</LName>
     <Message>Eligible for Bonus</Message>
     <BonusTotal>$1500</BonusTotal>
</Payroll>
<?xml version="1.0" encoding="UTF-8"?>
<Payroll>
     <FName>Tonya</FName>
     <LName>Lee</LName>
     <Message>Not Eligible for Bonus</Message>
     <BonusTotal>$0.00</BonusTotal>
</Payroll>
```

Chapter 10

Task Assignment

This chapter covers the User Activity and its role in Task Assignment. The case study in this chapter is designed to illustrate the functionality of the User Activity, in addition to showing a working example of Task Assignment using the Worklist Manager and Worklist Viewer.

10.1 User Activity Overview

The User Activity allows users to participate in business processes. eInsight supports the definition of organization hierarchies and user roles for task assignment. Tasks can be escalated and delegated by users from custom worklists and activity processing windows. Working with SeeBeyond eVision Studio, eInsight can create tailored workflow tasks with processing pages that are tailored specifically for each task. See **Case Study: Audit Processing** on page 105 for a complete Task Assignment example.

1 Create the Business Process and add a User Activity.

2 Set up a repository of users, organizational structures and roles in LDAP. (See **Organizational Roles** on page 99.)

3 Set up user assignments. See **Configure Task Assignment** on page 101.

4 Use the Worklist Manager to **Manage Tasks** on page 103.

See **"Case Study: Audit Processing" on page 105** for an end to end User Activity exercise.

10.1.1 User Activity Configuration

This section provides an overview of how to configure the User Activity. This option uses LDAP to determine who belongs to the organizational structure.

Configure a User Activity

The basic steps to configure the User Activity are as follows:

1 Create a business process model, (see **"Building a Business Process Model" on page 29**).

2 Configure your database for persistence and run the Database Scripts, (see **"Persistence and Monitoring" on page 63**).

3 Add a User Activity as part of your business model. See **"Configure a User Activity" on page 95**.

4 Create an **eVision Studio PageFlow** (see the *eVision Studio User's Guide* for details).

5 Drag the **eVision PageFlow** to the User Activity, see **"Create the eVision Pages" on page 110**.

Figure 63 Configured User Activity

6 Add a Worklist Viewer to your Environment, see **"Create a New Project and Environment" on page 108**.

7 Add Flex Attributes (optional). See **Flex Attributes** on page 98 for details.

Figure 64 Worklist Manager Settings
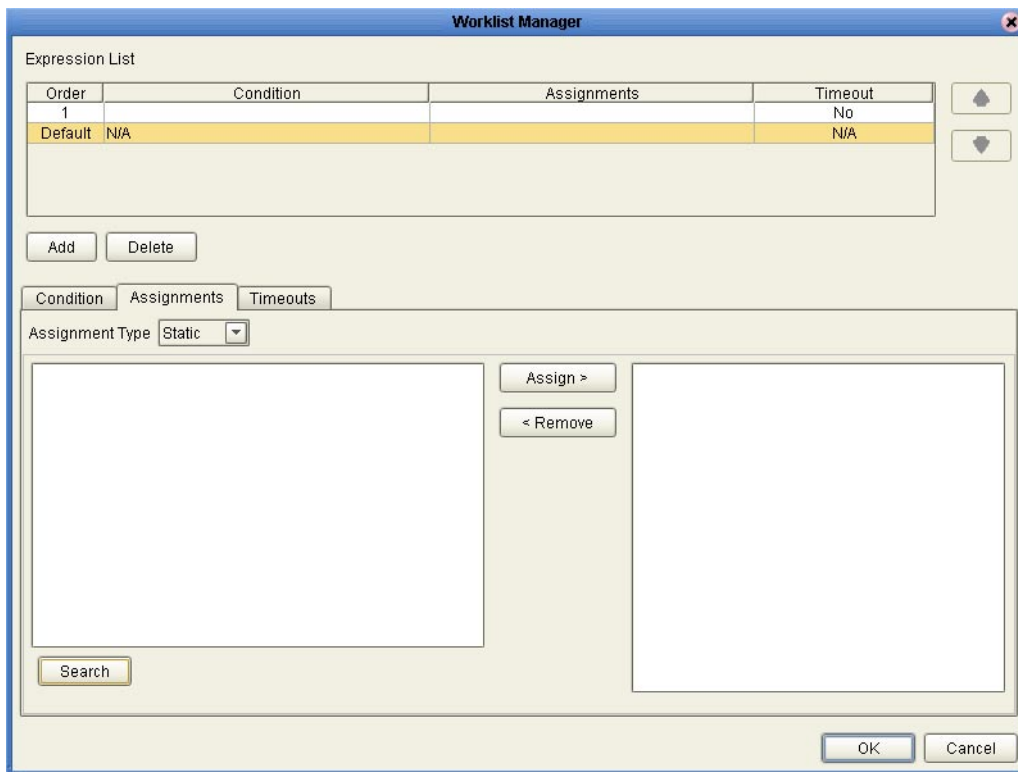
8 Run Task Assignment, see **"Task Assignment" on page 101**.

Configure a User Activity inside a While Loop

When creating a business process that includes a User Activity inside of a While Loop (see **"While" on page 36**), you must take a few extra steps in the configuration, as outlined below.

1 Configure the User Activity as described above (**"Configure a User Activity" on page 95**).

2 Add a business rule to the link leaving the User Activity.

3 Open the Business Rule Designer and expand the **WLVTask.Input** node.

4 Copy a business process attribute from the left pane to the right pane, as shown in Figure 65.

The purpose of this step is to create an output container.

Figure 65 Copy Business Process Attribute
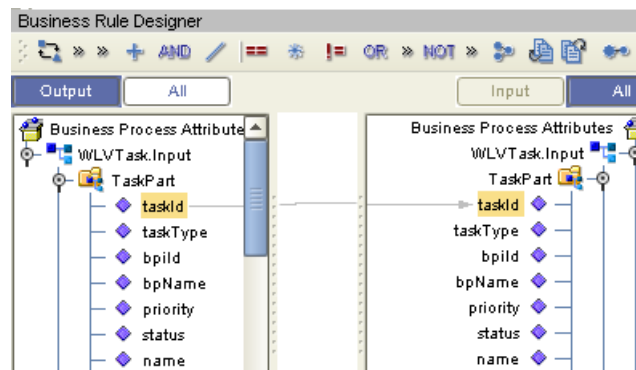
5 Open the Business Rules pane and click **Show Single Mapping**, as shown in Figure 66.

Figure 66 Business Rules
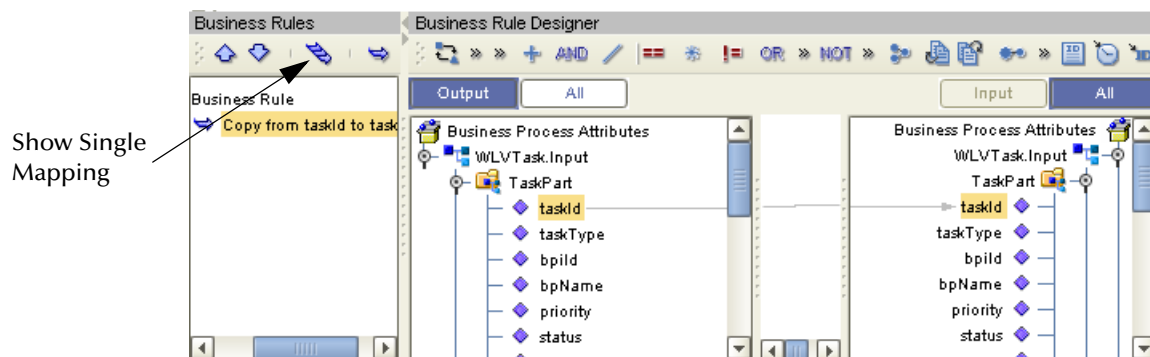
6 Right-click the copy rule and select **Reset Destination**, as shown in Figure 67.

Figure 67 Reset Destination
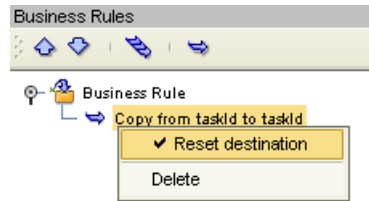
7 Save the business process.

Flex Attributes

Flex attributes are customizable attributes for use with Task Assignment. The attributes appear in the Business Rule Designer (as shown in **Figure 68 on page 98**)and also, as columns in the Worklist Manager. You can map values to these attributes in the Business Rule Designer, so that the values appear in the Worklist Manager. You can also label the attributes so they are easily identifiable in the Worklist Manager.

Figure 68 Flex Attributes in the Business Rule Designer
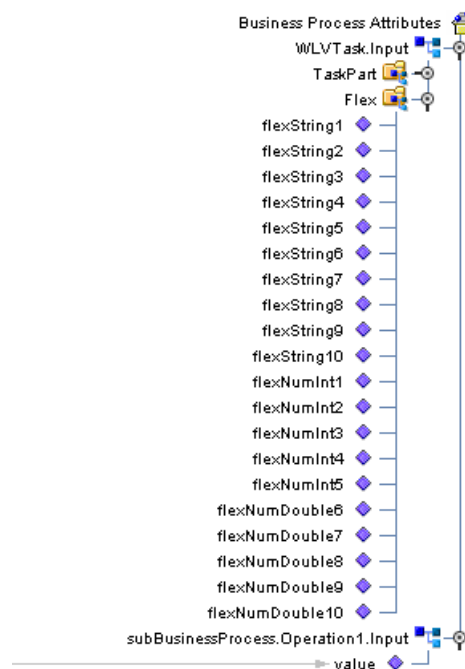
Customize Flex Attribute Labels

1 From the Environment Explorer tab, right-click the **WLV** component and select **Properties**.

2 From the **WLV Configuration** options, select **Flex Attribute Labels**, as shown in **Figure 69 on page 99**.

Figure 69 Flex Attributes
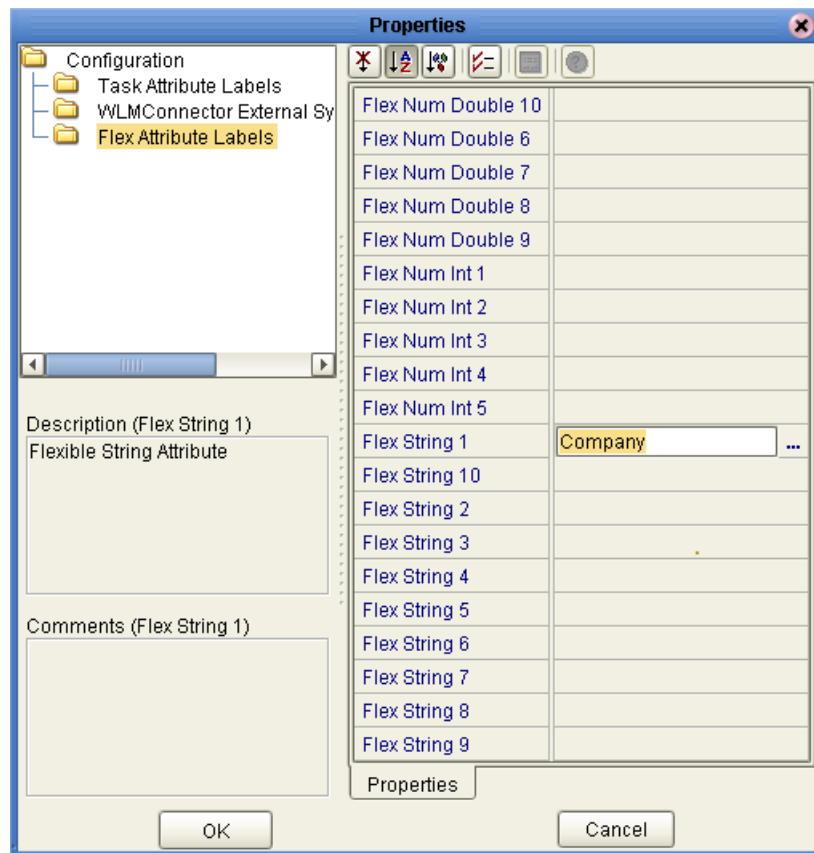
3   Create labels for as many attributes as necessary.

4   Click **OK** to save changes.

Organizational Roles

Organizational roles help define processes based on a person's position or title. By entering information about the structure of your organization, you can make processes easier to manage.

Support for LDAP means that you can use repositories of users, hierarchical organizational structures, and roles. An LDAP based applications can be used to populate the Worklist Manager with members of your organization and their organizational role. You assign rights based on organizational role assignments.

Figure 70   LDAP Connection Settings

For example, you may allow managers to view their subordinate's activity list (also called a **Worklist**) and the ability to reassign tasks in that list. As a manager, when you login to your Worklist, you see your tasks and the tasks of your direct reports.

Note: See your third party software vendor's manual for information about setting up your organization's information in LDAP.

User Activity in a UNIX Environment

If your ICAN environment includes a Logical Host on UNIX, you must configure your LDAP Provider URL to connect to your LDAP server.

Example of ICAN environment:

- Logicalhost - UNIX

- SeeBeyond Repository - Windows

- LDAP - Windows

In this environment, the LDAP Provider URL, in the WLM property sheet needs to be set to an exact URL.

Set LDAP Provider URL

1   From the Environment Explorer tab, right-click the **WLV** component and select **Properties**.

2   From the **WLV Configuration** options, select **WLM Connector External System**, as shown in **Figure 71 on page 101**.

Figure 71 WLM Connector Settings
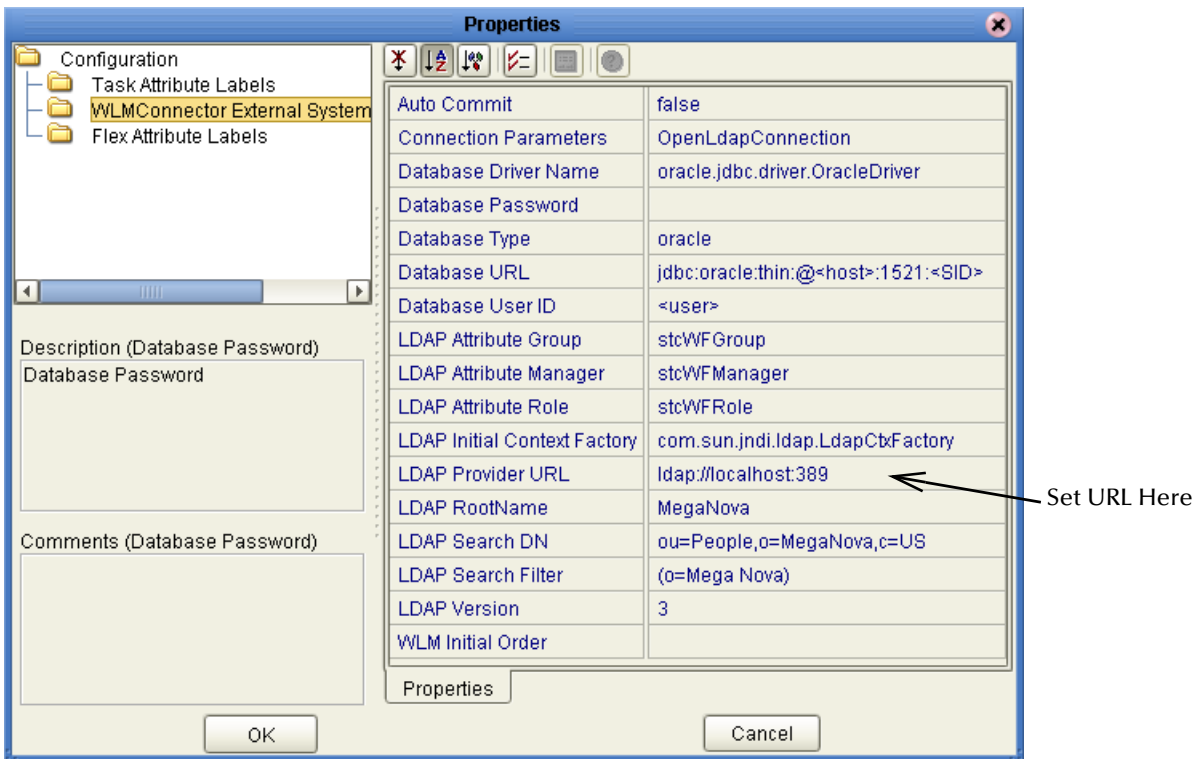
3 Enter the exact URL to your LDAP server in the LDAP Provider URL field.

4 Click **OK** to save changes.

10.1.2 Task Assignment

Task assignment allows you to set up and view tasks, depending on your organizational role. With certain management level rights, you may assign a person who will receive a task, if the activity fails. See **Case Study: Audit Processing** on page 105 for a complete Task Assignment example.

Configure Task Assignment

1 Double-click the **User Activity**.

The Worklist Manager dialog displays (see Figure 72).

2 Click **Search** to find an LDAP source, as shown in Figure 70.

The user list displays (See Figure 72).

3 Click **OK** to return to the Worklist Manager dialog.

Figure 72   Worklist Manager: Assignments Tab
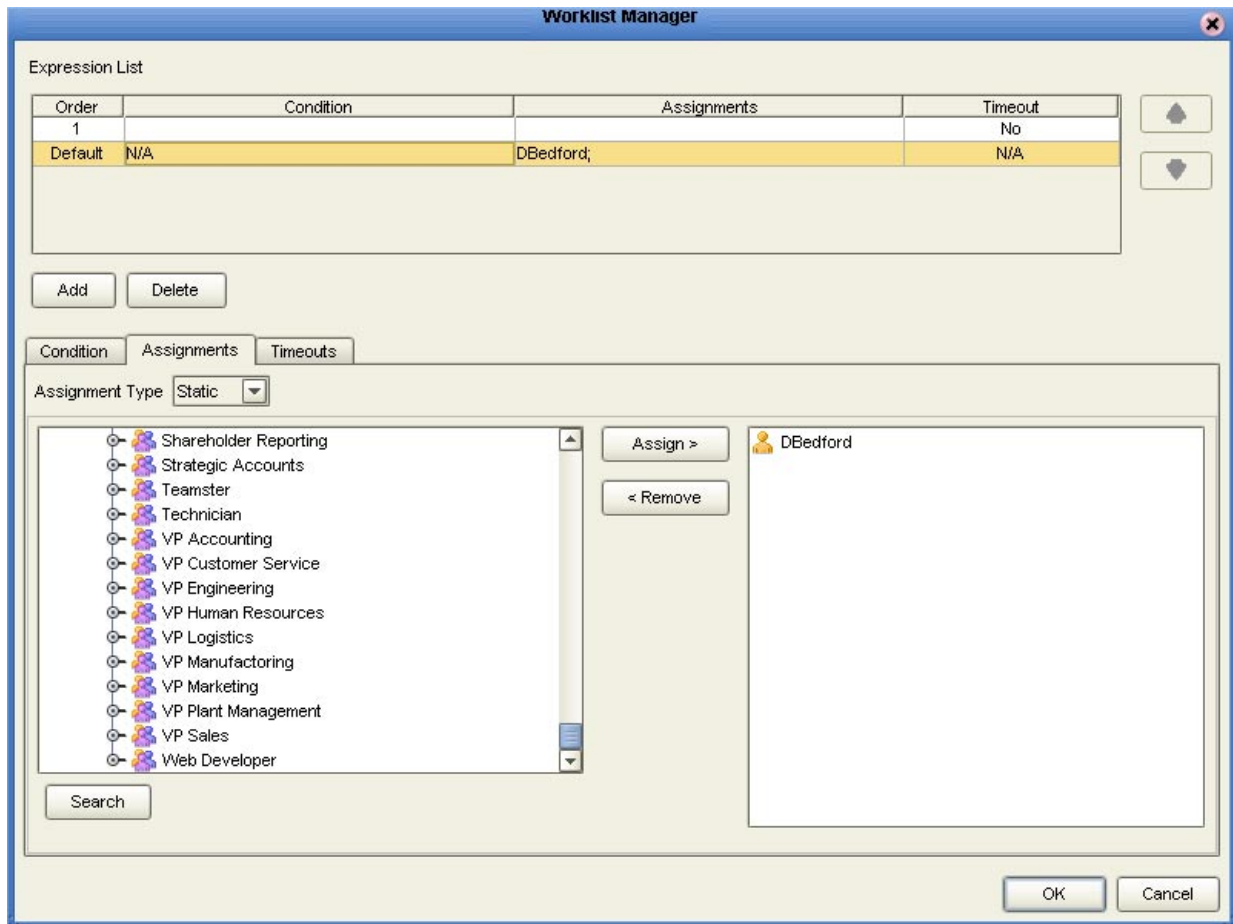
4   Navigate the Roles or Groups list to find your assignees**.**

5   Select individuals from the list and click **Assign**.

6   Select the **Condition** tab to enter an expression.

   You can create expressions in the Business Rule environment to evaluate an activity
   for user completion.

7   You may also:

   ◆ Add another rule by choosing **Add**.

   ◆ Delete an assignment from this page by selecting an expression and choosing
      Delete.

8   Click **OK** when you have completed the configuration.

Using the Worklist Manager

Login to the Worklist Manager to view your list of tasks. You will see your own tasks as
well as any subordinates assigned to you (if applicable). You can manage your tasks
and/or the tasks of your subordinates from this view. See Figure 74 for an example of a

manager's Worklist view. See **Task Assignment** on page 95 for a complete Task Assignment example.

Manage Tasks

From the Worklist Manager, you can manage your tasks and/or the tasks of your subordinates. You can access the Worklist Manager with a web browser by entering:

```
http://<localhost>:<port>/wlm
```

- <localhost>: The system where your Repository is running.
- <port>: The port number to access your Repository.

Figure 73   Worklist Manager Login
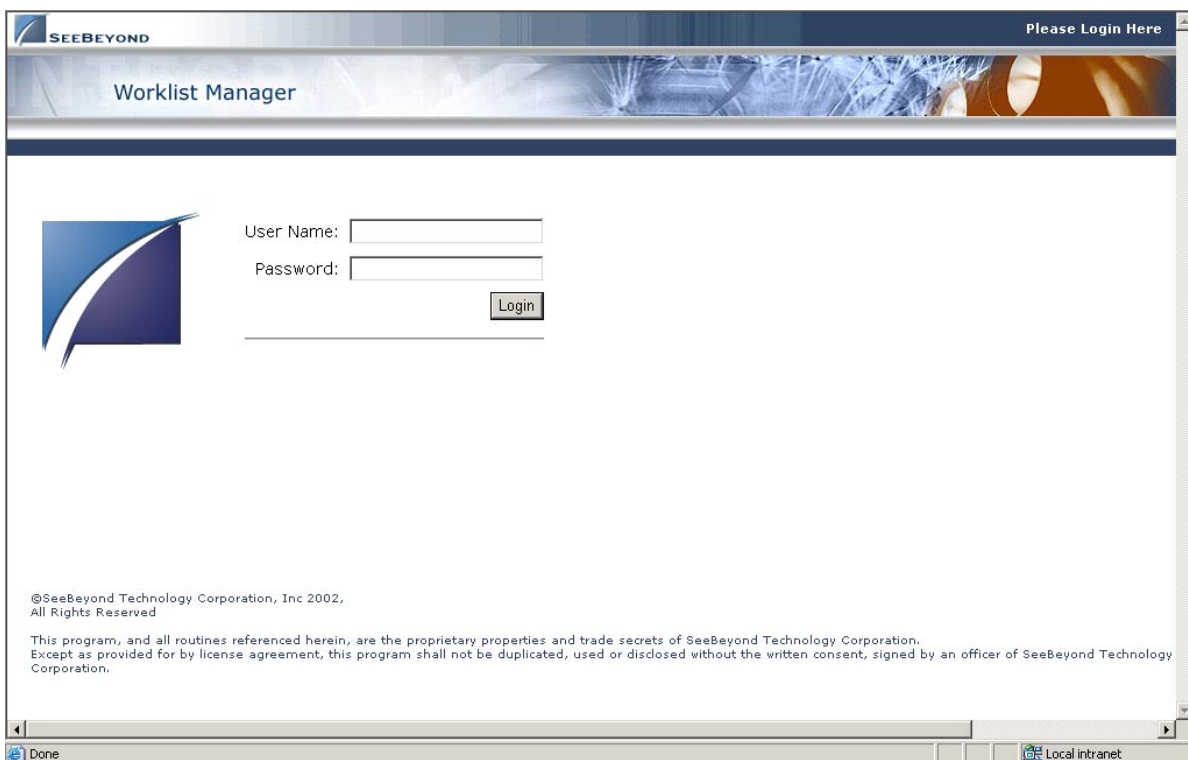
Figure 74 Worklist Manager: Task View

Here is an explanation of the options you will see:

- **Checkout/Checkin** is necessary to ensure that more than one person is not working on the same task. This is the first thing you must do before you can make any changes to a task.

- **Escalate** sends the task to the user's manager.

- **History** provides a record of all past information about the task.

- **Reassign** allows you to pass a task to another team member. Click **Reassign** and select a name from the drop-down list. This option is available for manager's only.

- **Execute** opens the task so that you can perform the task.

- **Complete** commits the changes. You must select **Complete** before leaving the Worklist Manager or your changes will be lost.

Note: *See* **Case Study: Audit Processing** *on page 105 for a complete Task Assignment example.*

10.2 Case Study Overview

Implementing a User Activity is the process of translating the vision of the business user into a functioning task assignment system. The User Activity must be configured but some may require modification.

Create the Input File

The first step in this implementation requires that you create the input file for the system. In an actual implementation, your input may come from an external system.

Create a New Project and Environment

In the second step of this implementation, you will create a new Project where your business process and eVision Pages will reside and a new Environment for your Project.

Create the eVision Pages and Business Process Models

In this step, you will create a new business process and a subprocess with a user activity that links to the task management system. You will also create the eVision Pages that act as the user interface to the system.

Create a Connectivity Map and Deployment Profile

When you create the Connectivity Map, you are making the connections between the system components and the external systems. You will also create a Deployment Profile that you will activate when you put the system into production.

Run and Test the System

To run the system, you must invoke the Bootstrap. This action will pick up your Deployment Profile and execute your task assignment system. Once the system processes your input files and data entered, an output file is created. To verify that this implementation has completed properly, check the output file.

10.3 Case Study: Audit Processing

The case study discussed in this chapter illustrates a simplified implementation of an auditing system. In this case, eInsight receives data as a text file as well as user input from an eVision page.

Once the system receives the data, a task appears in the Worklist Manager for the assigned user(s). The user has the option to complete the task or escalate the task to a manager. If the user is a manager, he/she also has the option to reassign the task to a subordinate.

10.3.1 Before You Begin

To complete this exercise, you need to have the following:

- ICAN 5.0 products installed:
  - eGate Integrator
  - eInsight Business Process Manager

◆ eVision Studio

◆ File eWay

▪ An Oracle database.

▪ An LDAP directory server. (For this example, **OpenLDAP** is used with the **MegaNova** database).

▪ A directory on your local drive named **data**.

LDAP Configuration

This sample uses the OpenLDAP application as the LDAP directory, with custom data (MegaNova). You will need to follow the instructions for your LDAP application to add data to the LDAP database. You must create your own directory data and data file. You can use the names suggested in our example, or substiture your own. If your directory structure is not the same, the sample may not run as written.

1 Install an LDAP applicaton.

For this example, OpenLDAP is used. At publication, this application is available from:

```
http://www.openldap.org
```

2 Install the binary file or compile your own. Install or uncompress it to:

```
c:\ldap
```

3 After installation, create a configuration file for your LDAP installation. See your LDAP documentation for details.

This configuration file is used in our sample:

Figure 75   Example: slapd.conf

```
include  c:/ldap/schema/core.schema
include  c:/ldap/schema/cosine.schema
include  c:/ldap/schema/inetorgperson.schema
include  c:/ldap/schema/stc.schema

pidfile  c:/ldap/slapd.pid
argsfile c:/ldap/slapd.args

databaseldbm
suffix   "o=MegaNova,c=US"
rootdn   "cn=Manager,o=MegaNova,c=US"
rootpw   secret
directoryc:/ldap/MegaNovaDB
indexobjectClasseq
```

4 Add the schema definition to your schema folder:

Example: c:/ldap/schema/stc.schema

```
# schema/stc.schema
#
# Auxiliary Object Class to be used with Person (or subtypes of it)
#
#  Roles allows a user to be cross functional
```

```
attributetype (1.3.6.1.4.1.1351.666.1.1
    NAME 'stcWFRole'
    DESC 'STC WorkFlow User Roles' SUP organizationalUnitName )

#  Group provide department level groupings
attributetype (1.3.6.1.4.1.1351.666.1.2
    NAME 'stcWFGroup'
    DESC 'STC WorkFlow User Group' SUP organizationalUnitName )

#  Manager shows hierarchy in the organization
attributetype (1.3.6.1.4.1.1351.666.1.3
    NAME 'stcWFManager'
    DESC 'STC WorkFlow User Manager'
    EQUALITY distinguishedNameMatch
    SYNTAX 1.3.6.1.4.1.1466.115.121.1.12 SINGLE-VALUE )

# stcWorkFlowPerson
# The stcWorkFlowPerson represents people who are associated with an
# organization in both a department and a role.  It is an auxiliary
class
objectclass( 1.3.6.1.4.1.1351.666.1
    NAME 'stcWorkFlowPerson'
    DESC 'STC Work Flow Assignment Person'
    AUXILIARY
    MAY (
        stcWFRole $ stcWFGroup $ stcWFManager )
    )
```

5 Start the LDAP server from the command line.

   Example: c:\ldap> slapd.exe

6 Create or add the sample data (.ldif file) to the LDAP server.

   Example: c:\ldap> ldapmodify -a -v -D cn=Manager,o=MegaNova,c=US
   -h localhost -P 2 -x -w secret -f MegaNova.ldif

   You can manually modify the .ldif file or use an LDAP software utility, such as the
   OpenLDAP browser Softerra LDAP Broswer from:

   http://www.softerra.com/products/products.php

Input File

The sample system you are creating requires input information. For this exercise, you
will create an input file: **input1.txt**. The file that you create here, contains the data that
the system receives and changes to create your final output.

Create the Input File

1 Create a text file with your name, for example:

▪ **input1.txt:**

   Mary Smith

2 Save the file to **c:\data**.

10.3.2 ICAN Configuration

Run Worklist Manager Database Scripts

1 From the Enterprise Explorer, expand the SeeBeyond folder and the eInsight folder.

2 Right-click the **Worklist Viewer** and select **Checkout**.

3 Right-click the **Database Scripts** folder and select **Properties**, as shown in Figure 76.

Figure 76 Worklist Viewer Database Properties
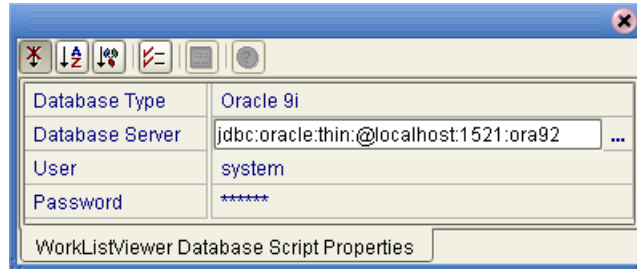
4 Configure the database properties to connect to your database.

Note: The Oracle user must have DBA privileges to create the new wlm user

5 Right-click on the **Oracle Install Scripts** and select **Run**.

A View your database to verify that the tablespace **wlm_data** exists.

B View your database to verify that the user **wlm** is defined.

10.3.3 Create a New Project and Environment

Create a new Project

1 Launch the Enterprise Designer.

2 Right-click your Repository and select **New Project.**

A new Project appears in your Project Explorer tree structure.

3 Rename the Project to **wlmProject**.

4 Click the **Save All** toolbar button to save your changes.

Create a new Environment

1 Select the **Environment Explorer** tab from the Enterprise Designer.

2 Right-click on your **Repository** and select **New Environment**.

3 Right-click on your **Environment** and select **New Logical Host**.

4 Right-click on your **Environment** and select **New File External System**.

The system prompts you to name the **File External System**.

5 Enter **File_IN** as the name of your **File External System**.

6 Select **Inbound File eWay** as the **External System Type**.

7 Repeat step 4 and name the **File External System**: **File_OUT**.

8 Select **Outbound File eWay** as the **External System Type**.

9 Right-click **Logical Host** and select **New SeeBeyond Integration Server**.

Create a Worklist Viewer and eVision External System

1 From the Environment Explorer create a **New Worklist Viewer** and name it **myWLV**.

2 Right-click on the **myWLV** and select **Properties**.

3 Select the **WLM Connector External System Configuration** and configure the following options:

    A Database Password: **wlm**

    B Database URL: enter your Oracle settings

    C Database User ID: **wlm**

4 Add an **eVision External System** and name it **eV1**.

5 Select **OK**.

Your new Environment will look like Figure 77.

Figure 77 New Environment
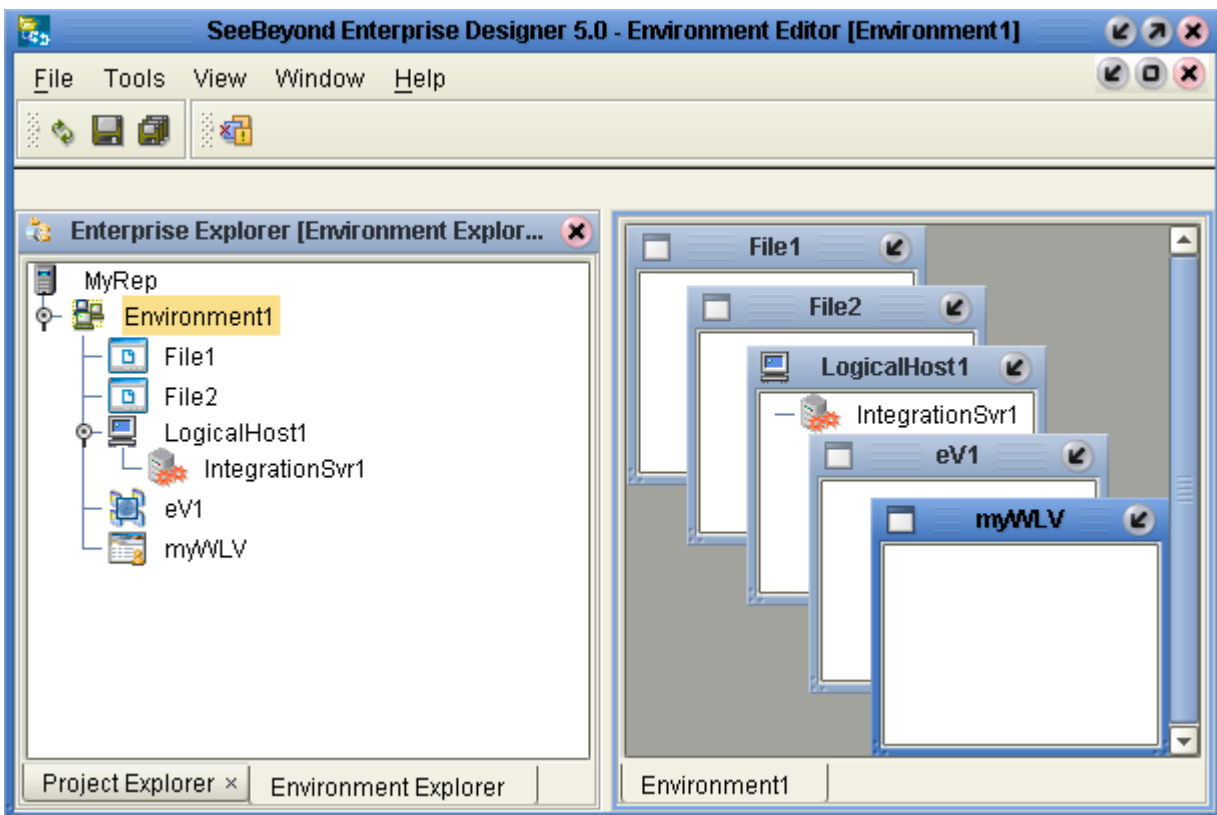
Add the LDAP users to your environment

1 Right-click on your Environment and select User Management.

2 Add the following users to the Worklist Manager:

    ♦ GRose

    ♦ CPina

    ◆ KComella

3 Fill in the Password information and Add a Role for each user, as follows:

    ◆ Password: **pass**

    ◆ Role: **all**

Figure 78   User Management

In the LDAP hierarchy for this example, the order from manager to subordinate is:

  ▪ KComella - Senior Manager

    ◆ CPina - Manager

        ◆ GRose - User

10.3.4 Create the eVision Pages

1 Right-click on your Project (**wlmProject**) and select New Page Layout.

2 Create a new Blank Page and name it **auditPage**.

    A Select the **html text** element from the Page tools and place it on the top center of the eVision page.

    B Replace the default text with **Audit Info**.

    C Select another **html text** element and place it on the page, under and to the left of Audit Info.

    D Enter **Name** for the default text.

    E Select a **textbox** element and place it on the eVision page, to the right of the Name label.

    F Place a **Submit Button** under the **textbox**, as shown in Figure 79.

Figure 79 auditPage Layout
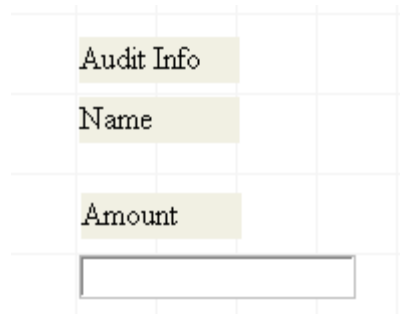
3 Create a new Blank Page and name it **exitPage**.

    A Select an **html link** element and place it near the top and center on the eVision page.

    B Enter **Close Window** as the default text.

    C Enter **javascript: void window.close()** in the property for the **href field**.

4 Click **OK** to close the properties page.

10.3.5 Create the Business Process Models

This section contains detailed instructions to build your model.

Create the SubProcess

1 Click the **Project Explorer** tab and right-click on your **wlmProject**.

2 Select **New**: **Business Process**.

A new Business Process appears in your directory tree under your Project and a blank Business Process appears in the Business Process Designer (right pane).

3 Rename the business process to **subBusinessProcess**.

4 Right-click on the business process and select the **Open Property Sheet**.

5 Click on the **Business Process Attribute** tab.

6 Click **Create** to add a new Business Process Attribute.

    A Name the new Business Process Attribute: **stringMessage**.

    B Select **SimpleDataTypes** for the namespace

    C Select **String** for the type, as shown in Figure 80.

Figure 80 New Business Process Attribute
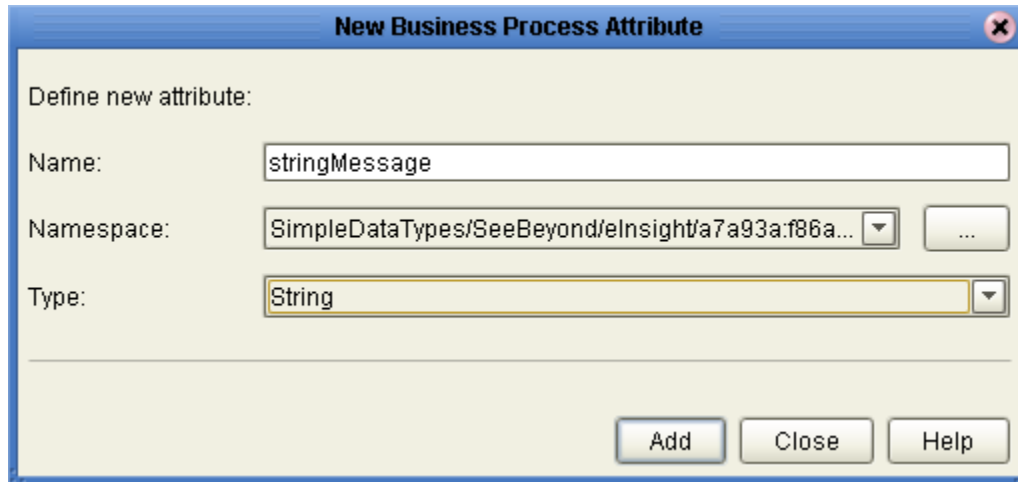
Create the WSDL file

1 Click on the WSDL tab and click **Create**.

2 Click **porttype** and **operation.**

3 Click **input operation**.

4 Go up one level to create an **output operation.**

5 For **IP_Message1**, select **stringMessage** for the Business Process Attribute.

6 For **OP_Message1**, select **stringMessage** for the Business Process Attribute.

Figure 81 New WSDL File
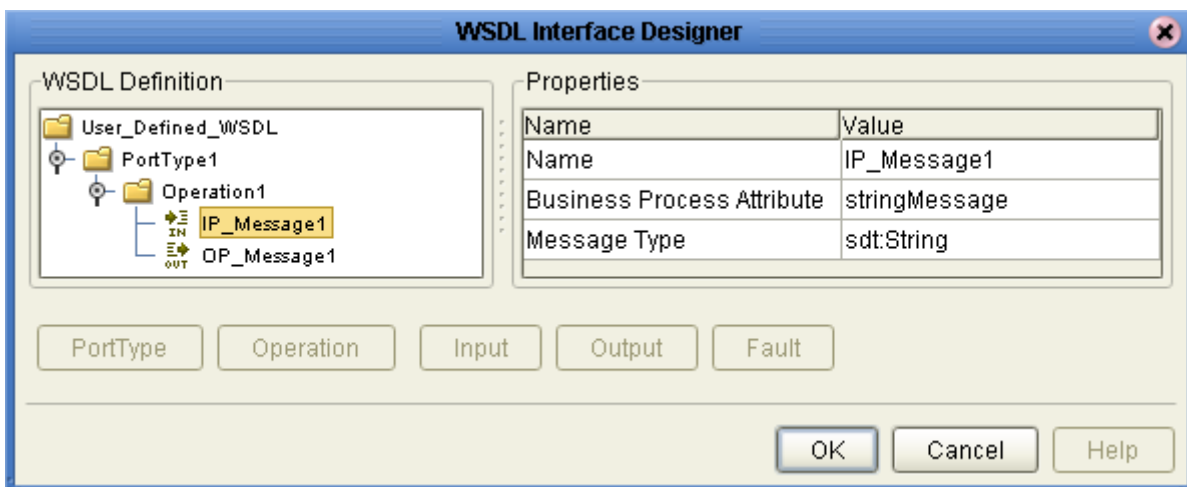
7 Select **OK**.

Create a Partner

1 Click on the **Partners** tab.

2 Create a new partner called **wlmpartner**.

Create the SubProcess Model

1 Select a Receive Activity from the eInsight toolbar and place it on the Business Process Designer (to the right of the Start Activity).

2 Select a Reply Activity from the eInsight toolbar and place it on the Business Process Designer (to the left of the End Activity).

3 Select the Show operation from the **auditPage** and place it on the Business Process Designer, between the Receive and Reply Activities.

4 Select the Show operation from the **exitPage** and place it on the Business Process Designer, to the right of the auditPage.

5 Link the activities:

A Move your mouse over the **Start** activity until a hand appears.

B Click and hold your mouse to drag a **Link** between the elements.

6 Repeat steps 5A and 5B to connect the entire model.

Figure 82 subBusiness Process
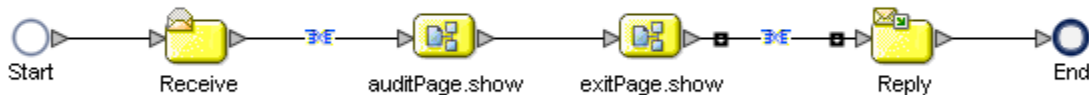
Add Business Rules to the Links

1 Right-click on the link between the **Receive Activity** and the **auditPage** and select **Add a Business Rule**.

2 Map the **stringMessage** value node to the text of the **Name** element in the input of the **auditPage**, as shown in Figure 83.

Figure 83 Add Business Rule to Link
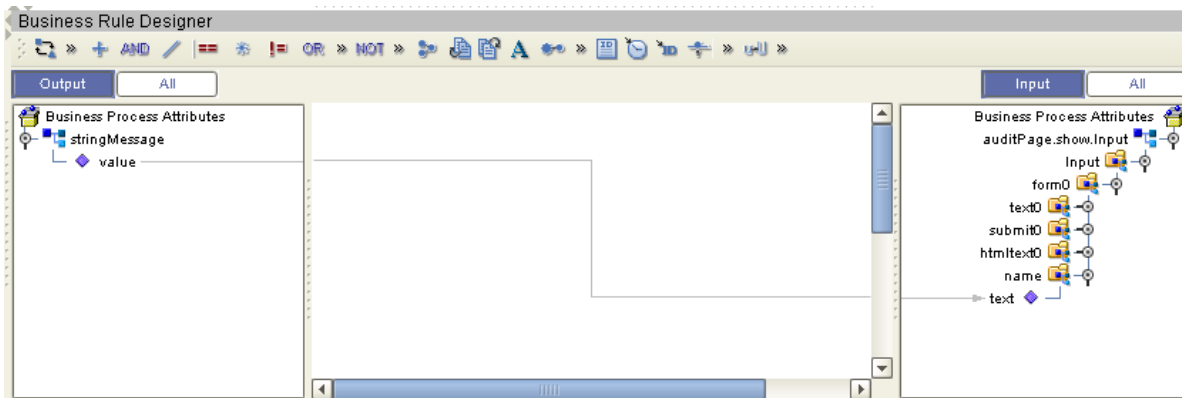
3 Right-click on the link between the **exitPage** and the **Reply Activity** and select **Add a Business Rule**.

   A Place a **Concat** Method on the **Business Rule Designer** from the Method Palette.

   B Map a link from the left pane's **Receive Activity:stringMessage** to **String1** of the **Concat** Method Box.

   C Place a **String Literal** Method on the **Business Rule Designer** and enter "**:**".

   D Map a link from the **String Literal** to **String2** of the **Concat** Method Box.

   E Place another **Concat** Method on the **Business Rule Designer**.

   F Map a link from the first **Concat** Method Box's Return String to String1 of the second **Concat** Method Box.

   G Map a link from the **text0** node under **auditPage.show.Output** to **String2** of the second **Concat** Method Box.

   H Map a link from the **Return String** of the second **Concat** Method Box to the value node under **stringMessage**.

Figure 84 Add Business Rule to Second Link
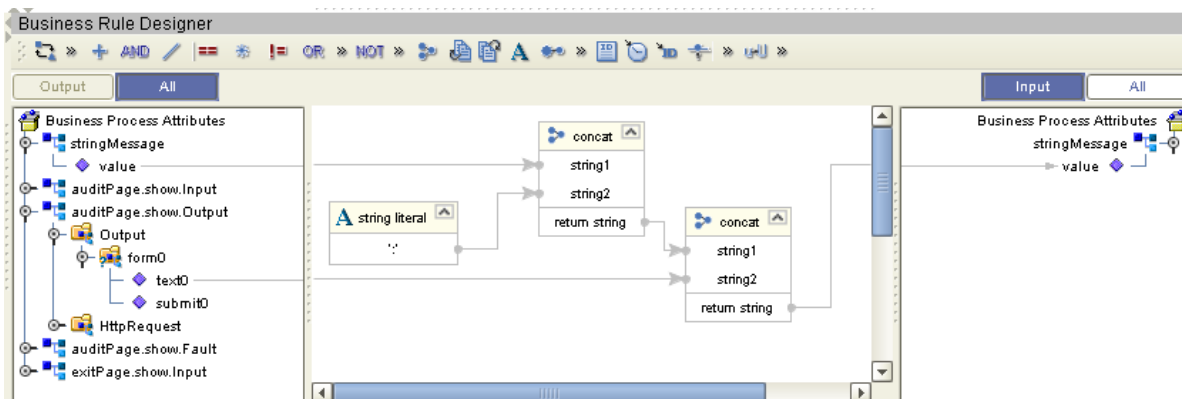
Define the WSDL for the Receive and Reply Activity

1 Select the **Receive** Activity and then click **Property Sheet** from the eInsight toolbar.

    A Select **wlmpartner** from the **Partner** field.

    B Select **sbcUserDef:PortType1** for the **Port Type**.

    C Select **Operation1** for the **Operation**.

2 Repeat for the **Reply** Activity.

Create the Parent Business Process

1 Right-click the **wlmProject** and select **New Business Process**.

2 Add a **File Receive** Activity:

    A Double-click the **SeeBeyond Project** from the Project Explorer tree view.

    B Double-click **eWays** under the SeeBeyond Project.

    C Double-click **File** under eWays.

    D Double-click **FileClient** under File.

    E Select and drag the **Receive** activity from **FileClient** to the Business Process Designer.

    F Place the **Receive** activity to the right of the **Start** activity.

3 Add the File Write Activity:

    A Double-click the **SeeBeyond Project** from the Project Explorer tree view.

    B Double-click **eWays** under the SeeBeyond Project.

    C Double-click **File** under eWays.

    D Double-click **FileClient** under File.

    E Select and drag the **Write** activity from **FileClient** to the Business Process Designer.

    F Place the **Write** activity to the left of the **End** activity.

4 Add a User Activity:

    A Select the User Activity icon from the eInsight toolbar.

    B Place the User Activity on the Business Process Designer, between the File Receive and File Write Activities.

5 Drag and drop the SubBusiness Process Operation Node (from the Project Explorer pane) onto the User Activity.

Figure 85   BusinessProcess1

10.3.6 Configure the Modeling Elements

1   Right-click on the link between the **File Receive Activity** and the **User Activity** and select **Add a Business Rule.**

2   Map a link from the **File Receive text** node to the input of the **subBusiness Process value** node.

3   Right-click on the link between the **User Activity** and the **File Write Activity** and select **Add a Business Rule**.

4   Map a link from the output **text** node of the **User Activity** to the **File Write text** node.

Configure the User Activity

1   Double-click the **User Activity**.
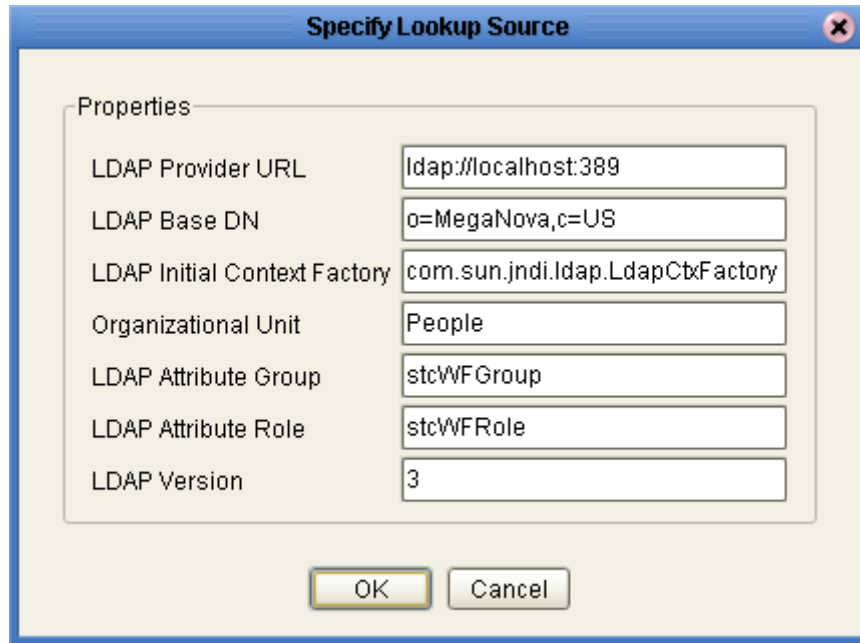
The User Activity properties appear, as shown in Figure 86.

Figure 86   User Activity Properties
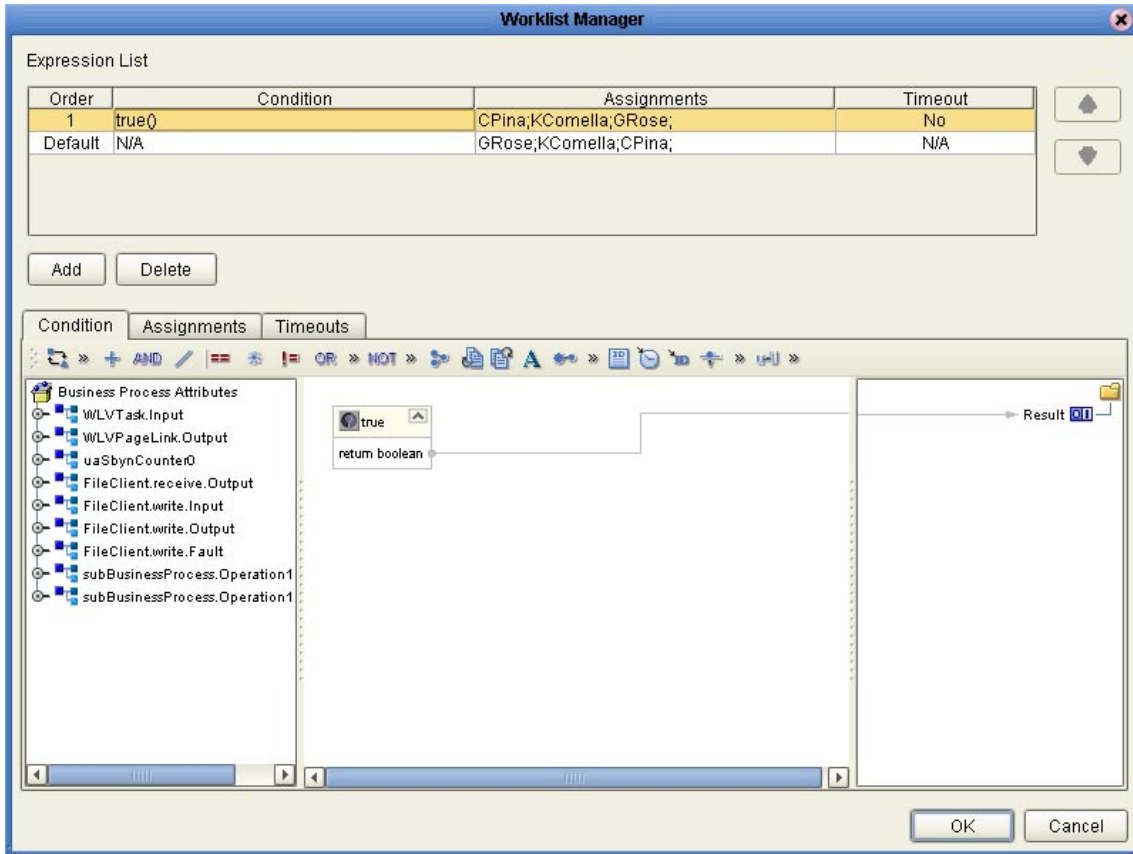
2   Click **Add** to create a new Case.

3   Click **Connect** to access the **LDAP** user directory.

Figure 87   Connect to LDAP

For this example, accept the default configuration.

4   Select the following users, for the first case and the default, from the LDAP
    directory:

    A   GRose (located under Roles:Marketing)

    B   CPina (located under Roles:Executives)

    C   KComella (located under Roles:Executives)

Figure 88   Assign Users
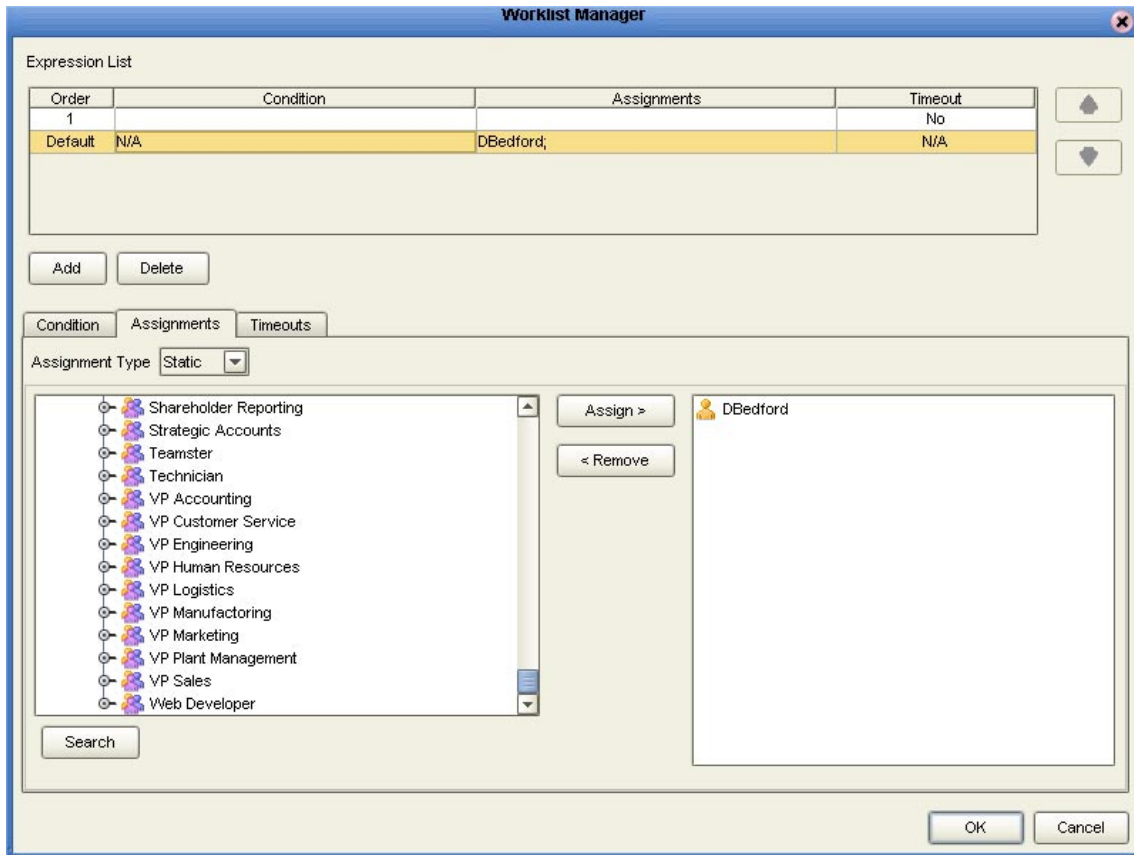
5   Create a **True** condition for the first case.

Note: *Note this is a static configuration. Dynamic allows you to assign users during runtime.*

10.3.7 Create a Connectivity Map and Deployment Profile

Create the Connectivity Map

1   Right-click your Project and select **New: Connectivity Map**.

A new node will appear under your Project. The default name is **CMap1**.

2   Select the **External Applications** toolbar icon and select **File External Applications**.

3   Drag the **File** icon to the Connectivity Map canvas.

4   Drag a second **File** icon to the canvas.

5   Select **BusinessProcess1** from the Project Explorer and drag it to the canvas.

6   Select **subBusinessProcess** from the Project Explorer and drag it to the canvas.

7   Add a **WebConnector** and a **WLM Connector** to the Connectivity Map.

Configure the Connectivity Map Elements

1 Double-click the **BusinessProcess11** and **SubBusinessProcess1**.

The **Business Process Service** dialogs appear.

A Drag a link from **File Sender** Service to the **File1** icon.

B Drag a link from the **File Receiver** Service to **File_output** icon.

C Drag a link from the **WSPProvider** to the **WebConnector**.

D Drag the **WLMPartner** to the **WLM Connector**.

E Drag the **UASubProcPartner** to the **WLMPartner** on the SubProcess.

2 Click the minimize buttons on the **Business Process** dialogs to close.

Figure 89 Completed Connectivity Map
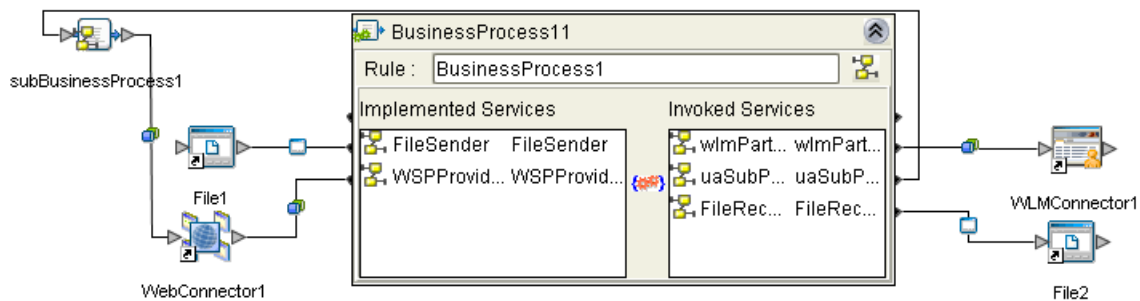
Configure the File Systems

Configure the Inbound File eWay

1 Double-click the link to **File1** to configure it.

The **Templates** dialog appears.

2 Select Inbound **File eWay** and select **OK**.

The **Properties** dialog appears.

3 Change the **Directory** to **C:\data**.

4 Change **Input** file name to **input*.txt**.

5 Click **OK** to save changes.

Configure the Outbound File eWay

1 Double-click the link **File2** to configure it.

The **Templates** dialog appears.

2 Select **Outbound File eWay** and select **OK**.

The **Properties** dialog appears.

3   Change the **Directory** to **C:\data**.

4   Change the **Output** file name to **output%d.txt.**

5   Click **OK** to save changes.

Deployment Profile

Create the Deployment Profile

1   Right-click your **Project** from the **Project Explorer**.

2   Select **New: Deployment Profile**.

3   The **Create Deployment Profile** dialog appears.

4   The **Deployment Profile** is called **Deployment1** by default. You can accept the default name.

5   Select the **Environment** (**Environment1**) that you created previously.

Configure the Deployment Profile

1   Drag **BusinessProcess11** and **SubBusinessProcess1** from the middle pane to the **Integration Server** (**IntegrationSvr1**) located in the **LogicalHost** window.

2   Drag **File1 -> BusinessProcess11** from the middle pane to the **File_IN** window.

3   Drag **BusinessProcess11 -> File2** to the **File_OUT** window.

4   Drag **WebConnector1->BusinessProcess11** to **eV1**.

5   Drag **SubBusinessProcess1->WebConnector1** to **eV1**.

6   Drag **BusinessProcess11->WLMConnector** to **myWLV**.

Figure 90 Deployment Profile
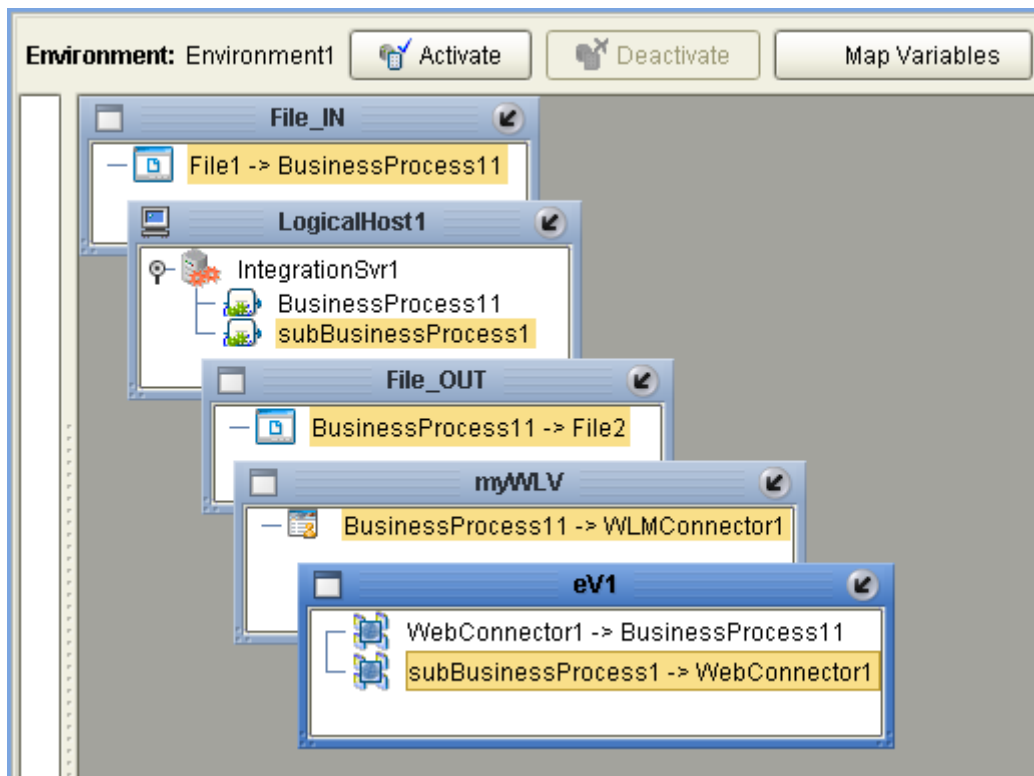
7 Click **Activate**.

8 Click **No**, so the change will not apply to the **Logical Host** immediately. (This is because your Logical Host is not running yet.)

10.3.8 Run and Test the System

Start the Logical Host

The Bootstrap process executes your **Project** and begins the process of polling your input data. The Bootstrap process is performed from a command prompt. Bootstrap will pick up the deployment profile the first time it runs; after that you would select reactivate and click **Yes** to apply the most recent changes to the Logical Host.

Note: The Bootstrap command is case sensitive on Windows.

To run the Bootstrap

1 Open a Windows command prompt.

2 Navigate to where you installed the Logical Host; for example, **ican50\logicalhost\bootstrap\bin**, then type the following command:

```
CD \ican50\logicalhost\bootstrap\bin
```

3 To start the Bootstrap process, type the following command:

```
bootstrap -e environment_name -l logicalhost_name
-r repository_URL -i username -p password
```

environment_name is the name of your environment (for example, *Environment1*),

logicalhost_name is the name of your Logical Host (for example, *LogicalHost1*),

repository_URL is the full URL of your Repository including the Repository name (for example, *http://localhost:12000/MyRep*),

username is your user name, and

password is your password.

Test the Task Assignment System

1   Connect to **http://localhost:18003/wlm** (This is the default for all WLMs).

2   Login as **GRose**.

Note: *Username: GRose, Password: pass.*

The task list is empty.

3   Copy your **input1.txt** file to **c:/data**.

4   Click refresh in the Worklist Manager.

A new task appears.

5   Select the new task and click the **Checkout** button.

6   Click **Execute** to launch the task.

The eVision **auditPage** appears, with the name portion completed with the name in your file.

7   Enter an amount in the amount text field.

The exit page appears.

8   Click Close Window.

You are back to the task view.

9   Click Complete from the task view.

The task disappears from your task list.

Other tests

1   Login as **CPina**.

2   Escalate the task.

3   Logout and login as **KComella**.

4   Allow the **KComella** to complete the task.

Check output

1   Navigate to **C:\data** and check for an **output.txt** file.

2   If the file exists, open it and examine the data. It should look like this:

```
Mary Smith:10,000
```

> *Note:* *Your input depends on the contents of your file and the entry you make in the Amount field.*

<div align="right">

Chapter 11

</div>

Upgrading eInsight Business Process Manager

This chapter discusses the steps you need to upgrade eInsight.

This chapter contains:

- **"Overview" on page 125**
- **"Integrate Existing Business Processes and Schemas" on page 126**
- **"eInsight Upgrade Procedure" on page 125**
- **"Connect Using the Schema Runtime Environment" on page 126**

11.1 Overview

When considering an upgrade to eInsight 5.0, you should examine the number and complexity of your existing Business Process Models. If you have several complex Business Process Models in production, you may choose to integrate your current configuration with eInsight. This option allows you to leave your existing processes in place, while gaining the latest monitoring abilities and allowing you to create your new Business Process Models in eInsight.

11.1.1 eInsight Upgrade Procedure

The process of installing the Schema Runtime Environment (SRE) includes these high-level steps:

1 Install the eInsight Schema Run-time Environment

2 Register Components with the Repository

3 Connect Schema Components to Projects

4 Connect Project Components to Schemas

5 Monitor Components with the Enterprise Manager

Note: *See the SeeBeyond ICAN Suite Upgrade Guide for more information about upgrading your e*Gate Integrator installation.*

11.2 Integrate Existing Business Processes and Schemas

To integrate your existing e*Insight Business Processes and related Schemas, you will use the **Schema Runtime Environment** (SRE). Integrating your Business Processes and Schemas gives you the flexibility to use your existing implementation with the benefits of the new browser-based monitoring tools available in the Enterprise Manager.

11.2.1 Connect Using the Schema Runtime Environment

The SRE allows your systems to take advantage of ICAN tools by providing existing e*Insight Schemas the ability to interact directly with the SeeBeyond JMS IQ Manager. eInsight 5.0 Projects and e*Insight 4.5.x Schemas (running in the SRE) can publish and subscribe to each other's services. This inter-operability is established without re-writing existing Java and Monk Collaborations.

The SRE includes e*Gate and e*Insight GUIs and editors needed to maintain the upgraded components. See the *SeeBeyond ICAN Suite Upgrade Guide* for a list of platforms supported by the Schema Runtime Environment.

<div align="right">

Appendix A

</div>

Method Palette

This appendix describes each method that appears in the Business Rule Designer's Method Palette.

12.3 Operators

Operators are the methods that allow you to manipulate data with standard mathematical operators.

Figure 91   Method Palette: Operator tab
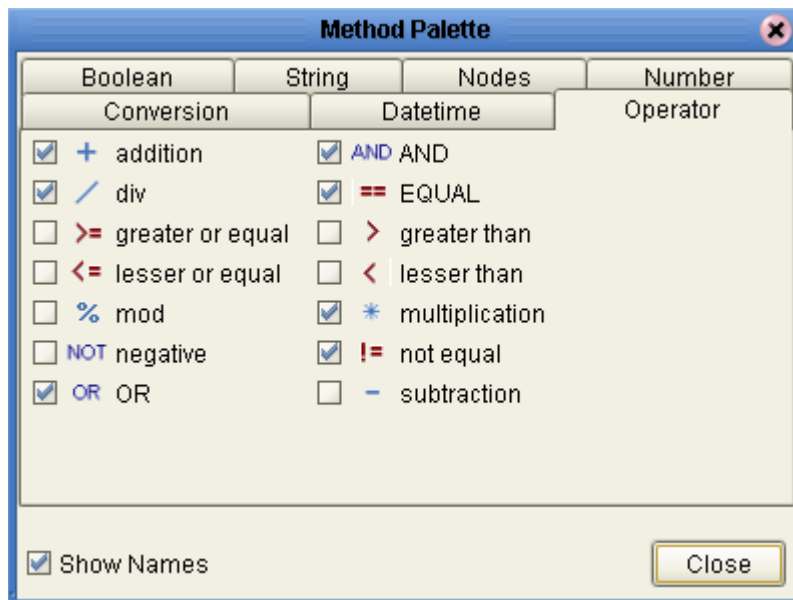
Table 11   Operator Methods
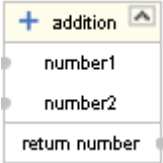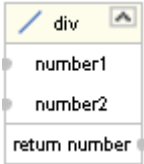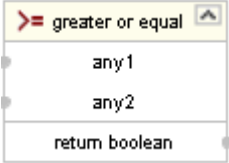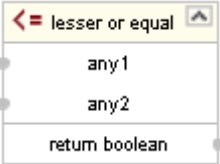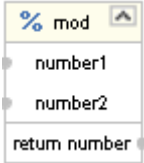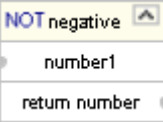
Method Box	Name	Description/Usage
	addition	Adds the value of *number1* to the value of *number2*, returns the sum.
	division	Divides the value of *number1* by the value of *number2*, returns the quotient.
	greater or equal	Returns Boolean true if *number1* is greater than or equal to *number2*; otherwise, returns Boolean false.
	lesser or equal	Returns Boolean true if *number1* is less than or equal to *number2*; otherwise, returns Boolean false.
	mod	Used to divide two numbers and return only the remainder.
	negative	Converts the input number to negative. Result is a negative number having the same absolute value as the input number.

Table 11   Operator Methods (Continued)
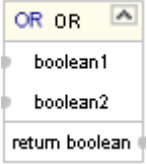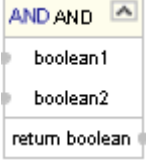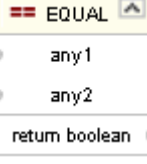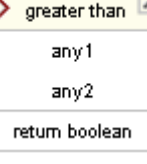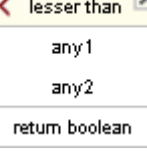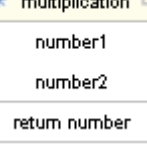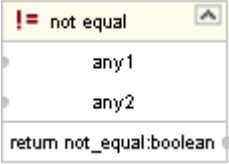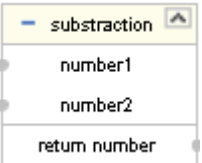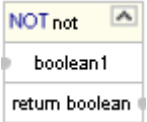
Method Box	Name	Description/Usage
OR OR boolean1 boolean2 return boolean	OR	Returns Boolean false if both *boolean1* and *boolean2* are false; otherwise, returns Boolean true.
AND AND boolean1 boolean2 return boolean	AND	Returns Boolean true if both *boolean1* and *boolean2* are true; otherwise, returns Boolean false.
== EQUAL any1 any2 return boolean	EQUAL	Returns Boolean true if *number1* is equal to *number2*; otherwise, returns Boolean false.
> greater than any1 any2 return boolean	greater than	Returns Boolean true if *number1* is greater than *number2*; otherwise, returns Boolean false.
< lesser than any1 any2 return boolean	less than	Returns Boolean true if *number1* is less than *number2*; otherwise, returns Boolean false.
* multiplication number1 number2 return number	multiplication	Multiplies the value of *number1* by the value of *number2*, returns the product.

Table 11   Operator Methods (Continued)

Method Box	Name	Description/Usage
	not equal	Returns Boolean true if *number1* is not equal to *number2*; otherwise, returns Boolean false.
	subtraction	Subtracts the numerical value of *number2* from the numerical value of *number1*, returns the difference.
	not	Returns the inverse of *boolean1*.

12.4 String

The String methods allow you to manipulate string data.

Figure 92   Method Palette: String tab
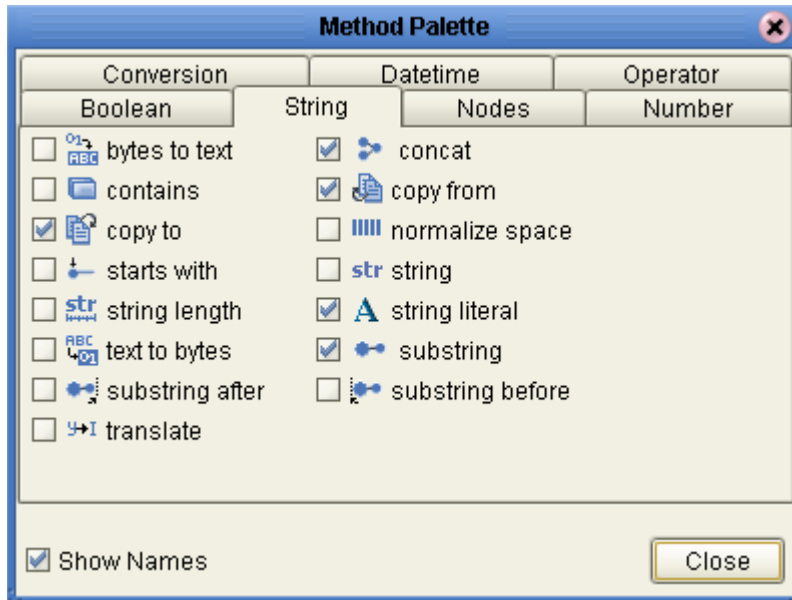
Table 12   String Methods

Symbol	Name	Description
	bytes to text	Decodes bytes into text using the specified encoding. If no encoding is specified, the platform's default encoding is used.
	contains	Returns true if the second string is contained within the first string, otherwise it returns false
	copy to	Allows you to type in the xpath expression for the destination of a copy operation. This is useful for entering xpath predicates. Note: This is for advanced users who are familiar with xpath and BPEL syntax.

Table 12   String Methods (Continued)
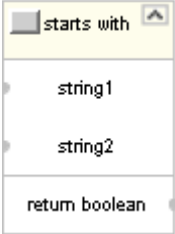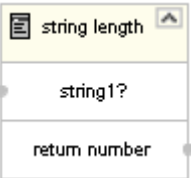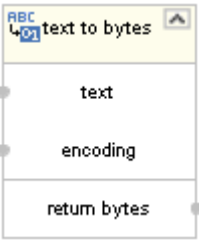
Symbol	Name	Description
	starts with	Returns true if the first string starts with the second string, otherwise it returns false
	string length	Returns the number of characters in a string
	text to bytes	Encodes the input text into a sequence of bytes using the specified encoding. If no encoding is specified, the platform's default encoding is used
	substring after	Returns the part of the string in the string argument that occurs after the substring in the substring argument
	translate	Performs a character by character replacement. It looks in the value argument for characters contained in string1, and replaces each character for the one in the same position in the string2

Table 12 String Methods (Continued)
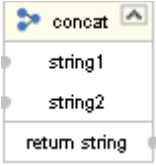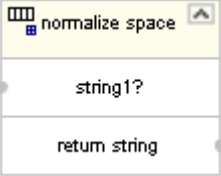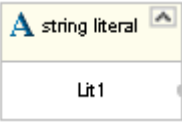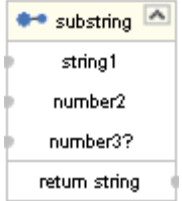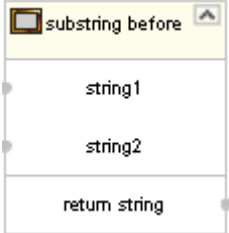
Symbol	Name	Description
concat string1 string2 return string	concat	Returns the concatenation of all its arguments
copy from /<Business process attribute1>/<Part>/<XPath Query1>	copy from	Allows you to type in xpath expression for the source of a copy operation. This is useful for entering xpath predicates. Note: This is for advanced users who are familiar with xpath and BPEL syntax
normalize space string1? return string	normalize space	Removes leading and trailing spaces from a string
string object1? return string	string	Converts the value argument to a string
string literal Lit1	string literal	A sequence of characters of fixed length and content
substring string1 number2 number3? return string	substring	Returns a part of the string in the string argument

Table 12   String Methods (Continued)

Symbol	Name	Description
	substring before	Returns the part of the string in the string argument that occurs before the substring in the substring argument.

12.5   Number

The Number methods allow you to work with number data.

Figure 93   Method Palette: Number tab
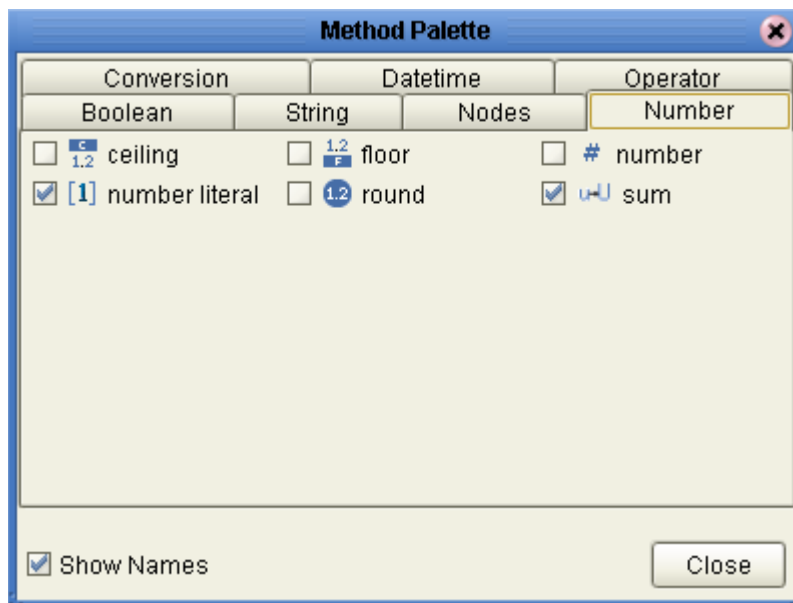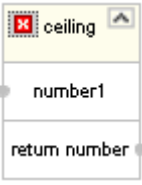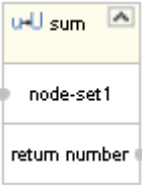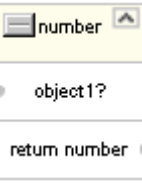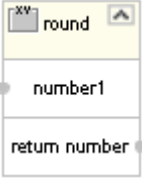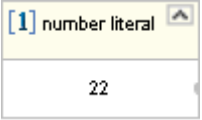
Table 13   Number Methods

Symbol	Name	Function
ceiling	ceiling	Returns the smallest integer that is not less than the number argument
sum	sum	Returns the total value of a set of numeric values in a node-set
floor	floor	Returns the largest integer that is not greater than the number argument
number	number	Converts the value argument to a number
round	round	Rounds the number argument to the nearest integer
number literal	number literal	A literal number string of fixed length and content

12.6 **Boolean**

Boolean methods allow you to apply boolean logic to your data.

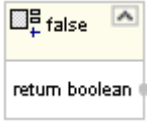**Figure 94** Method Palette: Boolean tab
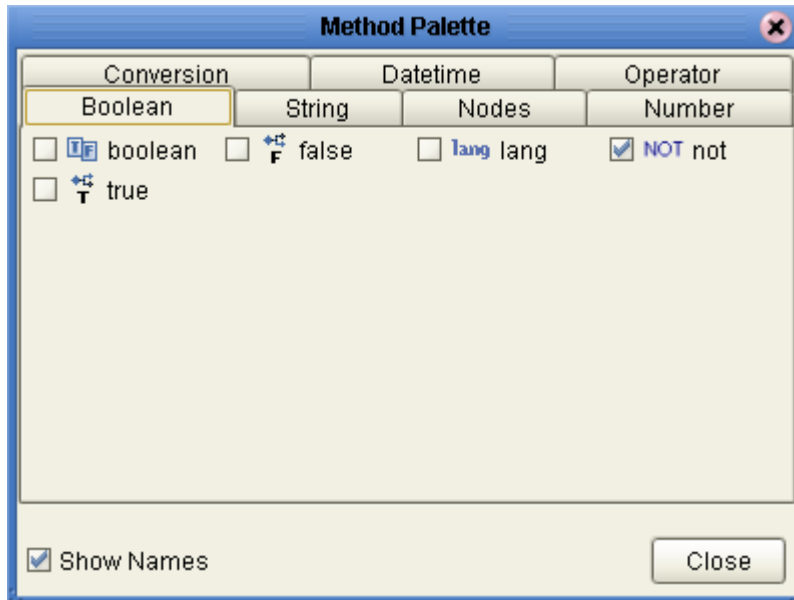
Table 14 **Boolean Methods**
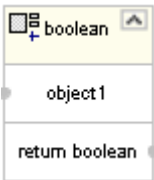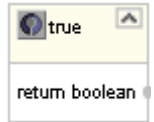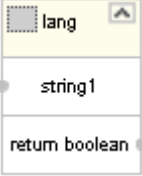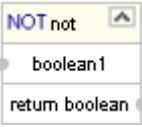
Symbol	Name	Function
boolean object1 return boolean	boolean	Converts the value argument to Boolean and returns true or false.
true return boolean	true	Returns true
false return boolean	false	Returns false

Table 14 Boolean Methods (Continued)

Symbol	Name	Function
	lang	Returns true if the language argument matches the language of the xsl:lang element, otherwise it returns false
	not	Returns true if the condition argument is false, and false if the condition argument is true

12.7 Nodes

Node methods allow you manipulate your data.
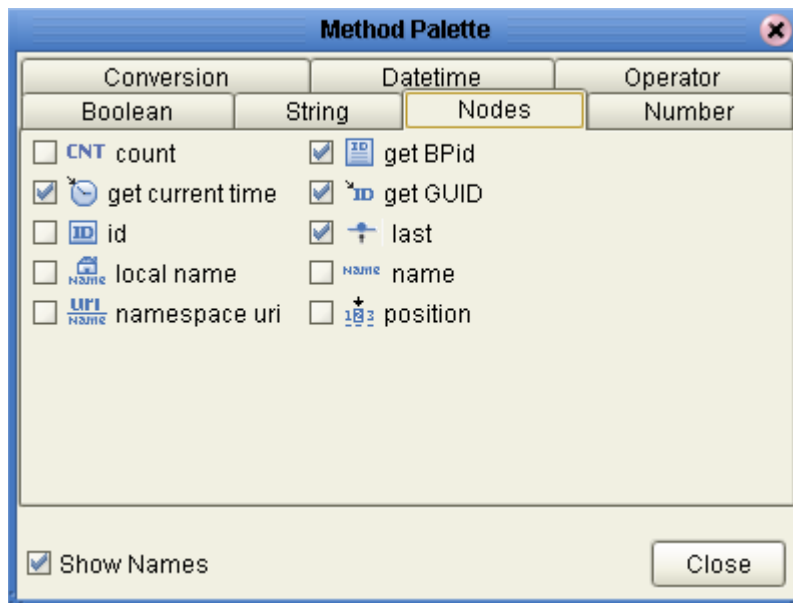
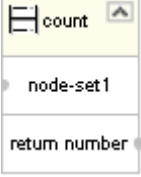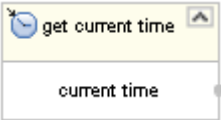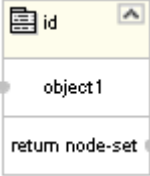**Figure 95** Method Palette: Nodes tab

Table 15   Nodes Methods
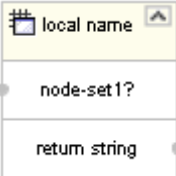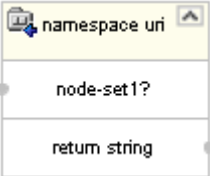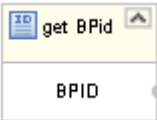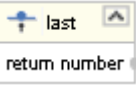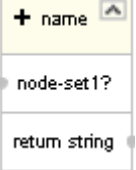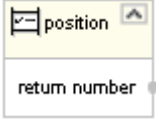
Symbol	Name	Function
count node-set1 return number	count	Returns the number of nodes in a node-set
get current time current time	getCurrentTime	Gets the current time in ISO 8601 format (e.g. 2003-08-15T02:03:49.92Z).
id object1 return node-set	id	Selects elements by their unique ID
local name node-set1? return string	local name	Returns the local part of a node. A node usually consists of a prefix, a colon, followed by the local name
namespace uri node-set1? return string	namespace uri	Returns the namespace URI of a specified node
get BPid BPID	getBPId	Gets the business process instance ID.

Table 15   Nodes Methods (Continued)

Symbol	Name	Function
	getGUId	Gets a randomly generated globally unique ID.
	last	Returns the position number of the last node in the processed node list
	name	Returns the name of a node
	position	Returns the position in the node list of the node that is currently being processed

12.7.1 Datetime

Datetime methods allow you to manipulate date, time and duration of data.

Figure 96 Method Palette: Datetime tab
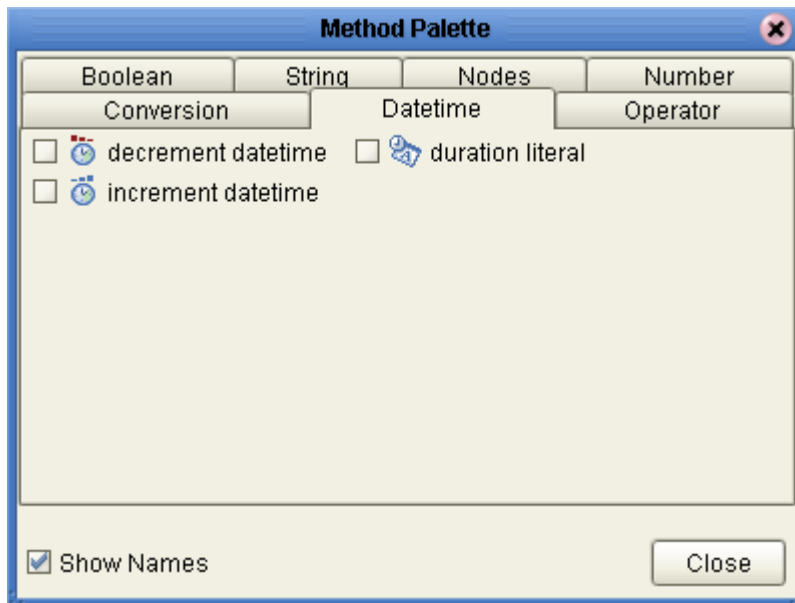
	decrement datetime	Dynamically decreases the date or time by a certain duration, such as days or hours.
	increment datetime	Dynamically increases the date or time by a certain duration, such as days or hours.
	duration literal	Allows you to set an actual date or time.

12.7.2 Conversion

The Convert method allows you to make conversions from various data types.

Figure 97 Method Palette: Conversion
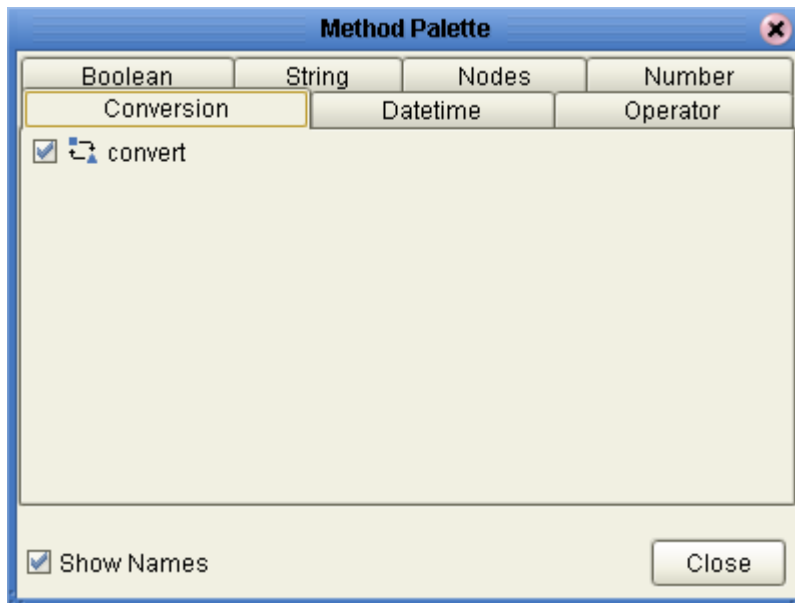
	convert	The convert function that takes in one input link and one output link. The data type conversions are described in **"Data Type Conversions" on page 141**.

12.8 Data Type Conversions

The Business Rule Designer supports a Convert function that takes in one input link and one output link. The Convert function is implemented from tree to tree mapping only. The Convert function is valid for conversions between leaf nodes. The Conversion function checks if the mapping is valid. The valid conversions are based off the following conversions.

12.8.1 String

Table 16 String

To	From
Boolean	custom
Float	parse
Double	parse

Table 16   String (Continued)

To	From
Decimal	parse
Byte	parse
Short	parse
Int	parse
Long	parse
Duration	parse
dateTime	parse
time	parse
date	parse
gYearMonth	parse
gYear	parse
gMonthDay	parse
gDay	parse
gMonth	parse
hexBinary	textToByte
base64Binary	textToByte
anyURI	parse
QName	parse
NOTATION	parse

12.8.2 Boolean

Table 17   Boolean

To	From
String	toString

12.8.3 Float

Table 18   Float

To	From
String	toString
Boolean	boolean

Table 18   Float (Continued)

To	From
Double	floatToDouble
Decimal	floatToDecimal
Byte	floatToByte
Short	floatToShort
Int	floatToInt
Long	floatToLong

12.8.4 Double

Table 19   Double

To	From
String	toString
Boolean	boolean
Float	doubleToFloat
Decimal	doubleToDecimal
Byte	doubleToByte
Short	doubleToShort
Int	doubleToInt
Long	doubleToLong

12.8.5 Decimal

Table 20   Decimal

To	From
String	toString
Boolean	boolean
Float	decimalToFloat
Double	decimalToDouble
Byte	decimalToByte
Short	decimalToShort
Int	decimalToInt
Long	decimalToLong

12.8.6 Byte

Table 21   Byte

To	From
String	toString
Boolean	boolean()
Float	byteToFloat
Double	byteToDouble
Decimal	byteToDecimal
Short	byteToShort
Int	byteToInt
Long	byteToLong

12.8.7 Short

Table 22   Short

To	From
String	toString
Boolean	boolean()
Float	shortToFloat
Double	shortToDouble
Decimal	shortToDecimal
Byte	shortToByte
Int	shortToInt
Long	shortToLong

12.8.8 Int

Table 23   Int

To	From
String	toString
Boolean	boolean()
Float	intToFloat
Double	intToDouble

Table 23   Int (Continued)

To	From
Decimal	intToDecimal
Byte	intToByte
Short	intToShort
Long	intToLong

12.8.9 Long

Table 24   Long

To	From
String	toString
Boolean	boolean()
Float	longToFloat
Double	longToDouble
Decimal	longToDecimal
Byte	longToByte
Short	longToShort
Int	longToInt

12.8.10 Duration

Table 25   Duration

To	From
String	toString
Boolean	boolean

12.8.11 dateTime

Table 26   dateTime

To	From
String	toString
Boolean	boolean
time	dateTimeToTime
date	dateTimeToDate

Table 26   dateTime (Continued)

To	From
gYearMonth	dateTimeToGYearMonth
gYear	dateTimeToGYear
gMonthDay	dateTimeToGMonthDay
gDay	dateTimeToGDay
gMonth	dateTimeToGMonth

12.8.12 time

Table 27   time

To	From
String	toString
Boolean	boolean

12.8.13 date

Table 28   date

To	From
String	toString
Boolean	boolean
gYearMonth	dateToGYearMonth
gYear	dateToGYear
gMonthDay	dateToGMonthDay
gDay	dateToGDay
gMonth	dateToGMonth

12.8.14 gYearMonth

Table 29   gYearMonth

To	From
String	toString
Boolean	boolean
gYear	gYearMonthToGYear
gMonth	gYearMonthToGMonth

12.8.15gYear

Table 30   gYear

To	From
String	toString
Boolean	boolean

12.8.16gMonthDay

Table 31   gMonthDay

To	From
String	toString
Boolean	boolean
gDay	gMonthDayToGDay
gMonth	gMonthDayToGMonth

12.8.17gDay

Table 32   gDay

To	From
String	toString
Boolean	boolean

12.8.18gMonth

Table 33   gMonth

To	From
String	toString
Boolean	boolean

12.8.19hexBinary

Table 34   hexBinary

To	From
String	byteToText
Boolean	boolean
base64Binary	hexBinaryToBase64Binary

12.8.20 base64Binary

Table 35   base64Binary

To	From
String	byteToText
Boolean	boolean
hexBinary	base64BinaryToHexBinary

12.8.21 anyURI

Table 36   anyURI

To	From
String	toString
Boolean	boolean

12.8.22 QName

Table 37   QName

To	From
String	toString
Boolean	boolean

12.8.23 NOTATION

Table 38   NOTATION

To	From
String	toString

Table 38 NOTATION (Continued)

To	From
Boolean	boolean

Glossary

activity
An organizational unit for performing a specific function. An activity defines a step of a particular business process.

activity states
The stages that activities within the business process instance go through as the business process version is being run.

Business Process Attribute
Attributes pass user-defined control information (programming arguments) to and from the eInsight Business Process Manager and its activities.

business process
A business process is a collection of actions and messages, revolving around a specific business practice, that flow in a specific pattern to produce an end result.

business process attributes
Business process attributes pass user-defined control information (programming arguments) to and from the e*Insight Business Process Manager, external sources, and internal components.

business process instance (BPI)
A unique instantiation of a business process.

business process model
The graphical representation of a business process.

business process version
A form or variant of the original business process model.

Collaboration
A component of an eWay that receives and processes Events and forwards the output to other eGate components.

eInsight Business Process Manager (eInsight)
The component within the ICAN Suite that facilitates the automation of the business process flow of business activities.

Decision
Controls the logical flow of data-based decisions in the business process model. A Decision outputs specific information when specified input conditions are met.

GUI

Graphical User Interface. A type of computer interface that enables the user to perform actions via the use of symbols, visual metaphors and pointing devices.

Business Process Designer

The Business Process Designer is the portion of the eInsight where you create the business process model, in the form of a flow chart.

security

Security is the ability to limit user access to specific items based on a pre-determined profile of the user.

state

See *activity states*

string

A sequence of text characters.

Sub-process

A sub-process is a business process which is called, or used by, another business process, as a sub-component.

tree view

The tree view displays a hierarchical representation of all the components, and their activities.

User activity

Allows external applications to access attributes in the business process.

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