



SERENA®

BUSINESS MANAGER

SBM Application Administrator Reference

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Overview

Beginning with SBM 10.1, many administrative capabilities are available in SBM Application Administrator, a modern Web interface that provides quick and easy access to commonly used features, such as projects, users, groups, and notifications.

Various component names have been modified as a result of these changes:

- Web Administrator is now SBM Application Administrator
- SBM Application Administrator is now SBM Application Repository

From the **Administrator portal**, use a single control to search for projects, users, and groups. Select an item from the results list, and you are presented with options applicable to that item, such as editing a selected user.

Pagination and search features throughout the interface allow for greatly improved performance when you are working with projects, large sets of users, and more.

To support this change, many features have been removed from the SBM System Administrator. Many new features have been added to SBM Application Administrator, and some features have been deprecated.

This document is intended to describe those changes. For guidance on using the SBM Application Administrator, refer to the *SBM Application Administrator Guide* or the online help.

Accessing SBM Application Administrator

To use SBM Application Administrator, administrators need:

- **Adobe Flash Player**

If the Flash Player is not installed or enabled for your browser, you are prompted to install or enable it when you open SBM Application Administrator.

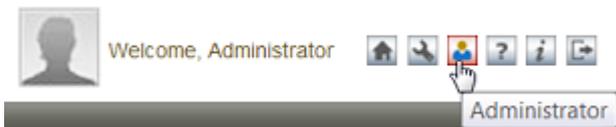
- **Remote Administration Privilege**

SBM Application Administrator does not use an ODBC connection, so administrators must be granted the Remote Administration privilege.

- **Managed Administration Privileges**

Users with Managed Administrator product access should be granted privileges to the features they manage, such as projects and groups. For details, refer to the "Managing Administrators" chapter of the *SBM Application Administrator Guide*.

To open *SBM Application Administrator Guide*, click the **Administrator** icon in the SBM User Workspace:



Quick List

Component Name Changes

- Web Administrator is now SBM Application Administrator
- SBM Application Administrator is now SBM Application Repository

Moved to SBM Application Administrator

- Projects
- Selection management for user-type fields for primary items
- Transition restrictions by group
- Transition overrides
- State overrides
- Notifications
- Users
- Groups
- Role assignments
- Record locks (release only)
- Business Calendars
- Mailbox creation for e-mail submission
- E-mail template editing (notifications and e-mail submission)
- Manage data (now referred to as Auxiliary Data)

Moved to SBM Configurator

- Notification Server configuration and stop/start
- Mail Client configuration and stop/start

New features in SBM Application Administrator

- Optimistic locking
- Import users from spreadsheet
- Import data from spreadsheet
- Date-based escalations
- WYSIWYG e-mail template editor (notifications and e-mail submission)
- Add change history to notifications (through e-mail template tag)
- Add attachments and notes to notifications (through e-mail template tag)

- Application variable overrides
- Compare and modify multiple user and group accounts

For features staying in SBM System Administrator, refer to [Features Staying in SBM System Administrator \[page 10\]](#).

For deprecated features, refer to [Deprecated and Removed Features \[page 12\]](#).

Features Moved to SBM Application Administrator

The following features have been moved from SBM System Administrator to SBM Application Administrator.

- **Projects**

- Add, edit, delete, and reorder projects
- Assign workflows to projects
- Enable or disable submissions for projects
- Set primary item numbering sequence
- Override default state and transition forms
- Override default project, state, and transition field ordering when quick forms are used
- Override field attributes and default values for projects and transition fields
- Override display options for fields in projects and transition fields (except *Binary/Trinary, Date/Time, Numeric, and Text* fields)
- Set dependent *User, Multi-User, or Multi-Group* field selections for independent *User* fields
- Override dependent field selections for independent *Single Selection* fields
- Web service enumeration mapping for state and transition actions

- **Workflows**

The **Workflows** tab was not moved from SBM System Administrator to SBM Application Administrator. The following workflow features have been added to projects, however:

- Restrict transitions by group
- Adding, editing, and deleting user and group selections for *User, Multi-User, and Multi-Group* fields
- Setting default values for *User, Multi-User, and Multi-Group* fields

Default values for user-type fields apply to a specific project. Transition restrictions for groups and selection management for user-type fields apply to all projects assigned to a workflow.

- **States and Transitions**

States and transitions have been combined in a single tab in the projects area of SBM Application Administrator. You can:

- Override the inherited form for states and transitions
- Override default field ordering for states and transitions when quick forms are used
- Override transition button ordering for states
- View transition restrictions by role
- Override transition button ordering
- Override authentication settings for transitions
- Override project settings for Post Item and Create Subtask transition types
- Override calculations for *Date/Time* and *Numeric* fields for transitions

- **Notifications**

Notifications are now created in SBM Application Administrator. You can:

- Create notifications and rules for workflows and auxiliary tables.
- Escalation settings have been merged with general notification settings. The process for creating escalations has not changed, however.
- Web service function selection and input/output mapping.
- Create custom e-mail templates for notifications.

- **Users, Groups, and Role Assignments**

Users and groups are now managed in SBM Application Administrator. Users and groups are also assigned to roles here.

- **E-mail Submission**

Mailboxes for e-mail submission are now created for individual projects in SBM Application Administrator.

- **E-mail Templates**

E-mail templates for notifications and e-mail submission are now modified in SBM Application Administrator.

- **Record Locking**

Records are now unlocked in SBM Application Administrator. Record locks are still activated for individual tables in SBM System Administrator, however, and the time-out period is also set for each table in SBM System Administrator.

- **Calendars**

Business calendars used for duration reports and notification escalations are now created in SBM Application Administrator.

- **Manage Data**

The search, submit, and update feature for auxiliary items has moved from the SBM User Workspace to SBM Application Administrator and has been renamed to Auxiliary Data. Users can still open this feature from the **Manage Data** link in the SBM User Workspace, however.

Features Moved to SBM Configurator

- **Notification Server Configuration**

The Notification Server is now powered by JBoss and managed entirely using SBM Configurator. Use SBM Configurator to configure the following Notification Server options:

- E-mail Server Type (including the new Exchange option, which replaced MAPI).
- General Notification Server options such as the maximum subject length, retry period and count, and the sender that appears in subject and body.
- Link Settings for internal and external Web servers that appear on every message sent by the Notification Server.
- Default From and Reply to addresses.
- Expired notification time and the expired messages logging option.
- Browser e-mail template selection. You can now select and customize the desired browser e-mail template from within SBM Configurator.
- General logging for both the Notification Server and Mail Client and the connection timeout setting.
- Options for sending a notification to the administrator when an error occurs.
- The option to configure SSL for the Notification Server and Mail Client has moved from SBM System Administrator and is now handled by importing certificates into the JBoss truststore.

- **Mail Client Configuration**

The Mail Client is now powered by JBoss and managed entirely using SBM Configurator. Use SBM Configurator to configure the following Mail Client options:

- Mail Server Protocol (including the new Exchange option).
- E-mail submission options that specify how the Mail Client should handle attachments and HTML formatted messages.
- E-mail Recorder. SBM Configurator now contains the E-mail Recorder mailbox connection information.
- E-mail Recorder options that specify how the Mail Client should handle attachments and HTML formatted messages.
- Note that the Insert E-mail as Note option has moved to SBM Configurator as part of the Mail Client settings as well.

New Features in SBM Application Administrator

The following capabilities have been added to SBM Application Administrator.

- **Optimistic Locks**

SBM Application Administrator uses optimistic locking. If multiple administrators make changes to features at the same time, the second administrator to save changes is given the option to overwrite the first administrator's changes, delete his or her own changes and get the changes made by the first administrator, or cancel the update.

- **Import Users From Spreadsheet**

Import new users and update existing user accounts from a spreadsheet. Spreadsheets can come from external tools, such as an Active Directory store or other Lightweight Directory Access Protocol (LDAP) providers, or you can manually create a spreadsheet.

- **Import Data From Spreadsheet**

Add new items or update existing items from a spreadsheet. You can import items into an auxiliary table or a specific project in a primary table (application table).

This feature is similar to the generic ODBC import in SBM System Administrator, which is still available.

- **Notifications**

- Delay notifications based on the value of a *Date/Time* field.
- Generate notifications for rule conditions based on empty field values.
- Apply business calendars to repeat notifications and to the new delayed notifications.
- Search for notifications and rules. In addition, you can filter the list of rules to those not referenced in notifications, and you can filter the list of notifications to those that do not have subscribers.
- See which notifications and escalations are using specific rules.
- Filter the list of notifications to show those that do not have subscribers. You can also filter the list of rules to those that are not assigned to any notifications.
- Delete multiple notifications at one time.

- **E-mail Templates**

Use a new WYSIWYG editor in SBM Application Administrator to create and modify notification and e-mail submission e-mail templates. This enables you to add and modify e-mail templates without an ODBC connection to the database server.

- **E-mail Template Tags**

The following notification template tags are now available:

- **\$ATTACHMENT()**

Adds all files attached to an item to the e-mail notification as long as the total size of all files does not exceed the size specified in the SBM Configurator.

- **\$CHANGEACTION()**

Returns the action and user that caused the notification to be generated, along with the date and time the action occurred.

- **\$CHANGES()**

Returns the change history for the item based on the action that caused the notification to be generated.

- **\$MAILHEADERPARAM()**

Use to add custom information to the e-mail header. For example, you can return sender information in the header.

- **\$NOTES()**

Includes notes added to an item by users or by e-mail messages. Individual notes that exceed the character limit specified in SBM Configurator are added to the item as attachments.

- **\$TRIGGEREDDATETIME()**

Returns the date and time the notification rule became "true" for an item. Date and time are formatted for the locale set in each user's profile.

- **Projects**

- Override application variables values used by rules.
- View transition restrictions by type.
- Pagination and searching has been added to the default value list for *User*, *Multi-User*, and *Multi-Group* fields.
- View decisions in the **States/Transitions** list.

- **Users, Groups, and Role Assignments**

- Compare and modify settings for multiple user and group accounts. This includes user preferences, and notifications subscriptions and privileges for users and groups.
- Search and sort when working with group membership.

Features Staying in SBM System Administrator

The following features remain available in SBM System Administrator.

- **Database Utilities**

- Database upgrades
- Create Database Wizard (includes creation of primary system administrator)
- Archive Wizard

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- Import Data Wizard (ODBC version)
 - Copy Database Wizard
 - Export and Import of XML strings
 - Database Locks
 - Administrative Locks (for SBM System Administrator features only)
 - Reset Administrator Access wizard (New)
 - Get Files From Database/Put Files in Database
 - Configuration of external databases used by cross-database posting (mailbox configuration has moved to SBM Application Administrator, however).
- **Tables**
 - View field properties established in Composer for primary and auxiliary tables.
 - Modify the following field properties for auxiliary tables:
 - Adding and deleting field selections for *User*, *Multi-User*, and *Multi-Group* fields.
 - Setting default values for *User*, *Single Relational*, *Folder*, *Multi-Group*, *Multi Relational*, and *Multi-User* fields.
 - Field selections for dependent *User*, *Multi-User*, or *Multi-Group* fields are established in the independent *User* and *Single Selection* fields in auxiliary tables
 - Enable caching for auxiliary tables
 - Set record locking settings for primary and auxiliary tables
 - Enable data import for primary and auxiliary tables

- **System Settings**

The options on the **Settings** dialog box remain in SBM System Administrator.

- **Folders**

Public and Knowledge Base folder management remains in SBM System Administrator.

- **LDAP Import and Update**

The ability to manage user authentication via LDAP and to import and update user account and Contact record information from a directory using LDAP remains in SBM System Administrator.

Customers can import users from a spreadsheet exported from LDAP in SBM Application Administrator, however.

- **E-mail Templates**

E-mail templates for self-registration and password change requests continue to be modified in SBM System Administrator.

- **Version Control Settings**

The options for customizing the SourceBridge/VM integration remain in SBM System Administrator.

Deprecated and Removed Features

- In SBM Application Administrator, the interface used to set preferences on behalf of users is now organized by preference type, such as display or content. In addition, the following preferences can now only be set by users in the SBM User Workspace:

- Quick form field sections (User, Manager, Advanced and System field section)
- Subtasks
- Attachments
- Hidden fields

The following preferences are available in SBM Application Administrator, but will be removed in a later release:

- Auto Spell Check
- State History Top View and Bottom View options
- Single Frame View

- The SBM Application Administrator does not provide a way to view individual workflow properties defined in SBM Composer. You can, however, view an image of the workflow by clicking the **Show Workflow** button on the project pages in SBM Application Administrator.
- You can no longer view actions and scripts assigned to states and transitions when you are configuring applications. These elements can only be viewed in SBM Composer.
- The Associate With Enabler option has been deprecated for group accounts.
- The View Folders system privilege has been deprecated. Privileges to view and update items in folders are now controlled by privileges on the Folders privilege tab.
- The **Established By** flag that indicated whether users were added to a group through an LDAP import, update, or auto-add is no longer available.
- Due to the migration of the Notification Server and Mail Client migration from SBM System Administrator to SBM Configurator, the following administrative privileges have been deprecated: Stop/Start Mail Client, Edit Mail Client Properties, Start/Stop Notification Server, and Edit Notification Server Properties.
- Because SBM Application Administrator now uses optimistic locking, the **Clear My Admin Locks** button has been removed.

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- The Amazon Search Widget has been deprecated. To create a similar query using the same information from Amazon, use the REST Grid Widget instead. By using the REST Grid Widget, if a service changes in the future, you can use SBM Composer to reimport the structure of the call, remap the elements, and then redeploy your process app.
 - New quick links cannot be created for auxiliary items opened from Manage Data.
 - The **Attributes** tab that was enabled when certain legacy integrations is no longer available for transitions. This tab listed scripts applied to a transition to enable it to perform an action in an applicable external product that is integrated with SBM.