



SERENA®
BUSINESS MANAGER
SBM Administrator Reference

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Part number: Product version: 10.1.4

Publication date: 2014-06-11

Table of Contents

Overview	4
Quick List.....	4
Features Moved to SBM Application Administrator	6
Features Moved to SBM Configurator	8
New Features in SBM Application Administrator	9
Features Staying in SBM System Administrator	9
Deprecated Features.....	11

Overview

Beginning with SBM 10.1, many administrative capabilities have been migrated to 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

To support this change, many features have been removed from the SBM System Administrator. Some system-level features were migrated to the SBM Configurator, and some features have been deprecated.

This document is intended to describe those changes as they apply to SBM 10.1.4.

Earlier versions of this document are available here:

- [SBM 10.1](#)
- [SBM 10.1.2](#)
- [SBM 10.1.2.1](#)
- [SBM 10.1.3](#)

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.

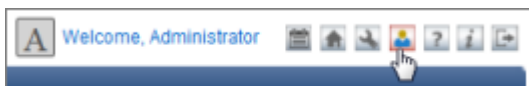
- **Remote Administration Privilege**

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
- Workflows for managing:
 - User and group selections for *User*, *Multi-User*, and *Multi-Group* fields
 - Default values for *User*, *Multi-User*, and *Multi-Group* fields
 - 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)
- LDAP imports for user accounts and contact records

Moved to SBM Configurator

- Application Engine database upgrades
- Authentication settings and password settings
- Notification Server configuration and stop/start
- Mail Client configuration and stop/start

Helpful Links

- [Features Staying in SBM System Administrator \[page 9\]](#)
- [New Features in SBM Application Administrator \[page 9\]](#)
- [Deprecated Features \[page 11\]](#)

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**

- Manage user and group selections for *User, Multi-User, and Multi-Group* fields. This eases administrative tasks by ensuring that selections are available for all projects assigned to workflow and to sub-workflows.
- Set default values for *User, Multi-User, and Multi-Group* fields.
- Set transition restrictions for groups.

- **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.
 - **Imports from LDAP**

You can import and update user accounts and *Contacts* record information from a directory using LDAP. This feature is available to global administrators in on-premise systems only.
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Features Moved to SBM Configurator

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

- **SBM Authentication Settings and Password Settings**

System authentication settings formerly located in the **Options | Settings | Server** tab in SBM System Administrator have moved to SBM Configurator. You now select the authentication source and choose a session management option in the **Authentication** tab in SBM Configurator. Additional sub-tabs appear depending on the authentication method that you select. Note that LDAP authentication requires that you configure LDAP server connection settings in SBM Configurator. After you successfully connect to your LDAP server and apply the changes in SBM Configurator, the connection settings appear in the **LDAP Setup & Tools** dialog box in SBM System Administrator for informational purposes.



Tip: You still use SBM System Administrator to configure Auto Add from LDAP settings (after you have configured LDAP authentication in SBM Configurator).

The **Passwords** tab in SBM System Administrator has been moved, and is now a sub-tab under the **Authentication** in SBM Configurator.

- **Application Engine Database Upgrades**

The Application Engine database upgrade is now performed by SBM Configurator. After you run the installer and launch SBM Configurator, click the **Upgrade Database** link on the **Database Servers** tab to upgrade the database.

- **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, the sender that appears in subject and body, and the start date.
- 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.
- Maximum attachment size and inline note size limit.
- Browser e-mail template selection. You can now select and customize the desired browser e-mail template from within SBM Configurator.
- Channel plugins that enable you to send notification messages to users from other mediums besides standard e-mail.

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- 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.

Additionally, you can now manage performance settings for the Notification Server and Mail Client in the **Performance** tab of SBM Configurator.

New Features in SBM Application Administrator

Along with feature migration from SBM System Administrator to SBM Application Administrator, a substantial number of new features have been added the new web-based administration interface.

For details on new features, refer to the "What's New" and "Additional Changes" of the following readmes:

- [SBM 10.1.4 Readme](#)
- [SBM 10.1.3.1 Readme](#)
- [SBM 10.1.3 Readme](#)
- [SBM 10.1.2 Readme](#)
- [SBM 10.1 Readme](#)
- [SBM 10.1.2.1 Readme](#)

Features Staying in SBM System Administrator

The following features remain available in SBM System Administrator.

- **Database Utilities**

- Database upgrades (applies to TeamTrack only; upgrades from earlier versions of SBM are now performed in SBM Configurator)
 - Create Database Wizard (includes creation of primary system administrator)
 - Archive Wizard
 - 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
- **Administrative Access Wizard**

Use this tool to reset the passwords of administrative users. This enables them to log on to SBM Application Administrator and other components if they lose or forget their password.
- **Seat License Resolution**

If you use seat licenses, the number of user accounts in your system cannot exceed the number of seat licenses added to Serena License Manager. If you inadvertently exceed the number of allowed user accounts, users receive an error when they attempt to log in.

Because user accounts are now managed in SBM Application Administrator, you must resolve this problem in SBM System Administrator.

Beginning with SBM 10.1.1.3, the **Users** tab in the SBM System Administrator is enabled automatically if you encounter this problem. Open SBM System Administrator and delete or modify user accounts so that they are in compliance with their seat licenses. (If you encounter this problem and the SBM System Administrator is already open, you need to close it and reopen it for the **Users** tab to appear.) Once you resolve user accounts, the **Users** tab is not visible the next time you open the SBM System Administrator.



Note: If you encounter this problem in a version earlier than SBM 10.1.1.3, contact Customer Support for a resolution.

- **System Settings**

Some of the options on the **Settings** dialog box remain in SBM System Administrator. Authentication settings and password management have moved to SBM Configurator.

- **Folders**

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

- **LDAP "Auto Add"**

The ability to configure LDAP user "auto add" remains in SBM System Administrator.

You can also use SBM System Administrator to import and update user account and Contact record information from a directory using LDAP. These features have also been migrated to SBM Application Administrator.

- **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 Features

The following features are no longer available.

- System authentication settings. The **Authentication** group box in SBM System Administrator, and the options in the **Passwords** tab are all now configured in SBM Configurator. LDAP server connection settings have been moved from the **LDAP Setup & Tools** dialog box into SBM Configurator as well.
- Database upgrades. Application Engine database upgrades from earlier versions of SBM are now performed using SBM Configurator.
- 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:

- 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
- 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.
 - 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 with 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.