
Q-flow 3.0: Organizational Model

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Q-flow 3.0

Organizational Model

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Introduction

The purpose of this manual is to explain the organization model used by Q-flow 3.0, and the tool which allows it to be modified.

Organization of this manual

This manual has two parts. The first part explains the organizational model used by Q-flow 3.0 and the concepts that this model uses. The second part explains the functioning of the Organization Model Manager, which is the tool which allows you to modify the Q-flow 3.0 organizational model.

The Organizational Model

This section describes the organizational model, the elements that make it up and some concepts that are needed to comprehend it.

Elements of the Organizational Model

The Q-flow organizational model manages three types of elements:

- Nodes
- Groups
- Users

Nodes

Nodes are useful for organizing in hierarchical form the organizational model's structure. There is a node which is the root of the structure. A node can contain groups and users, and it can also contain other nodes. A node is a container of other elements, and the set of nodes form a hierarchy structure similar to the structure of folders that is used to organize the files of a compute. The Organizational Model Manager shows that hierarchy structure.

Just as with folders, nodes have names which allow them to be identified. Besides, nodes have security properties which allow you to define who can see them or modify them, and in what way they may do so.

Groups

Groups are collections of users that share certain properties. Aside from containing users, a group can contain other groups.

Users

Users represent the Q-flow users. A user can be a member of several groups, but cannot be in more than one node. It is possible to import users and their data from Active Directory.

Important concepts

Below is an explanation of the security role and manager concepts, which are necessary for understanding some parts of the rest of this document.

Security roles

Security roles can be linked to the organizational model's elements. Security roles are linked to nodes, groups and users, and are useful for grouping permissions. The fact that a node may have a certain role means that the members of that node have the permissions that are associated with that role. For example, if a node has among its roles a role called "Editor", and that role has permission to edit the node, all the users and groups that belong to that node can edit it.

The Organization Model Manager allows you to add, modify and delete security roles, and define, for each element, which roles are related to it.

Security roles should not be confused with process roles, which are a way of abstracting the tasks of a process from the users who are performing them, and which are defined in the business process designer.

Managers

The concept of manager of users is the same as the concept of manager in Q-flow 2.3. It is a special role that can be carried out by a user or a group, and which allows hierarchy relationships to be defined within the organizational model. Managers can be selected as addressees of alerts for workflows which are waiting for actions to be carried out by their subordinates. Furthermore, in the Q-flow personal site there is an option which allows one to see the tasks of users who are managed by a certain user.

Differences with Q-flow 2.x

Unlike Q-flow 2.x, Q-flow 3.0 does not handle in its organizational model the concepts of organization roles (sometimes called “positions”) and work queues.

Q-flow 3.0 handles the concept of packages, which is similar to the folders concept. A package can contain several elements, amongst them being templates, roles and other packages. Since a package that is within another package inherits the elements of the package containing it, a defined role in a package can be used for templates contained within it, and can furthermore be used for templates that belong to packages that are further down in the hierarchy. That being so, if a role is defined in the root package, it can be used in any template, and in practice fulfills the same function that was fulfilled by the organizational roles in Q-flow 2.x.

On the other hand, Q-flow 3.0 roles can be carried out by many users, which is why they also fulfill the same functions as the work queues from Q-flow 2.x.

For more information about packages, templates and roles, see the business process designer manual.

The Organization Model Manager

The Organization Model Manager is the tool which allows you to modify and maintain Q-flow’s organizational model.

General description of the tool

Figure 1 shows the Organization Model Manager’s main panel, and shows what icons represent nodes, users and groups.

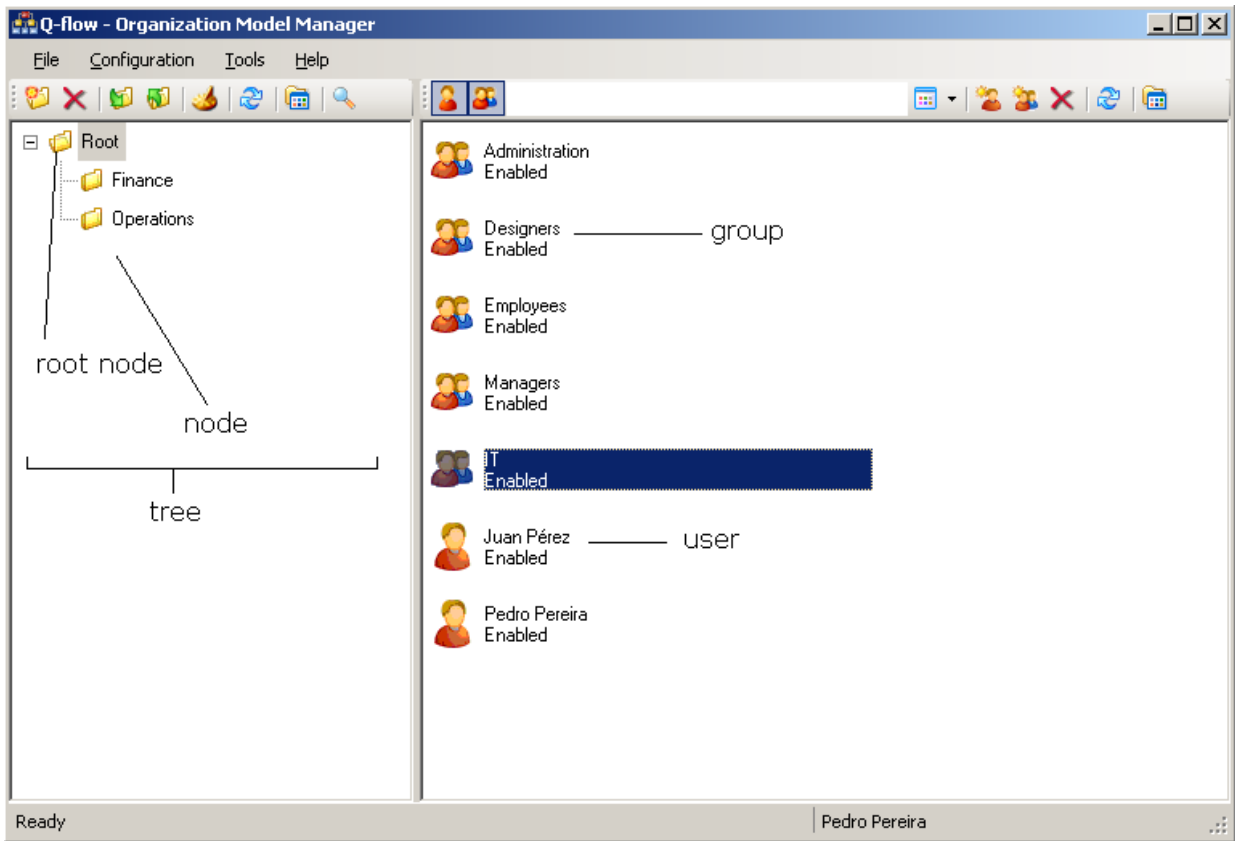


Figure 1 Main screen of the Organization Model Manager

Figure 1 shows on the left hand side of the screen a hierarchy tree which represents the structure of the organizational model, and that is composed of nodes. The right hand panel shows the groups and users that belong to the node that is selected in the tree.

In the upper part of the tree there is a tool bar. Figure 2 shows the elements of this bar, and describes what functions they fulfill.

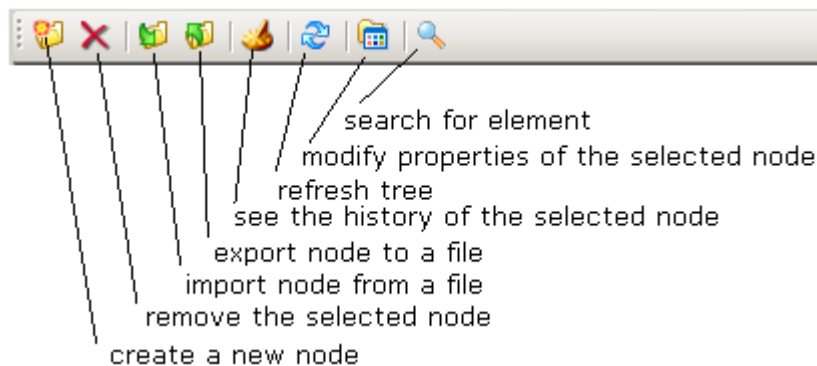


Figure 2 Node tree toolbar

Below is a description of the operations mentioned in the previous figure:

- **Create a new node:** creates a new organizational node. When a user clicks on this icon, Q-flow shows a window which allows them to enter the name of the node and a description (see Figure 3).
- **Remove selected node:** remove the selected node. It may occur that Q-flow cannot remove a node because the node is being used. In this case, Q-flow will show a message.
- **Import node from file:** imports a node (that is, the whole branch defined by the node) that had been exported in another environment, and puts it inside the selected node. When elements are imported whose identifiers coincide with those of existing elements, they are updated with the imported data. If they are in a node different from the selected node, they are moved to it.
- **Export node to a file:** exports the branch defined by the selected node. This file may be used later to import the exported branch in a different Q-flow environment. In addition to the selected node and its contents (descendant nodes, users, groups), all security providers, calendars and security roles are exported.
- **See the history of the selected node:** shows a window with a list of all changes that have been carried out for the node, along with the dates in which they were made and the name of the user who made them (see Figure 5).
- **Refresh tree:** reloads the node tree, causing it to reflect the modifications made in other computers since the last time it was loaded.
- **Modify properties of the selected node:** shows a window which allows you to modify the selected node's properties.
- **Search for element:** searches the tree for an element. When a user clicks on this button, Q-flow shows a window like the one in FIGURE. To search for an element by its name, write the name in the text box corresponding to the name and click on "Next". Q-flow will search and mark the first element found that meets the criterion. Si you click on "Next" again, Q-flow will mark the following element that meets the criterion, and so forth. It is possible to search for users by logon too.

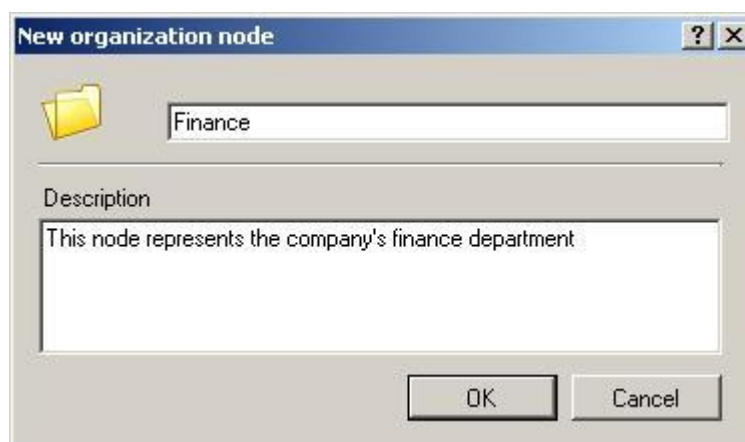


Figure 3 Creating a node

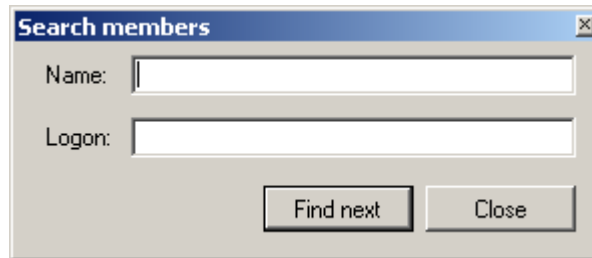


Figure 4 Search window

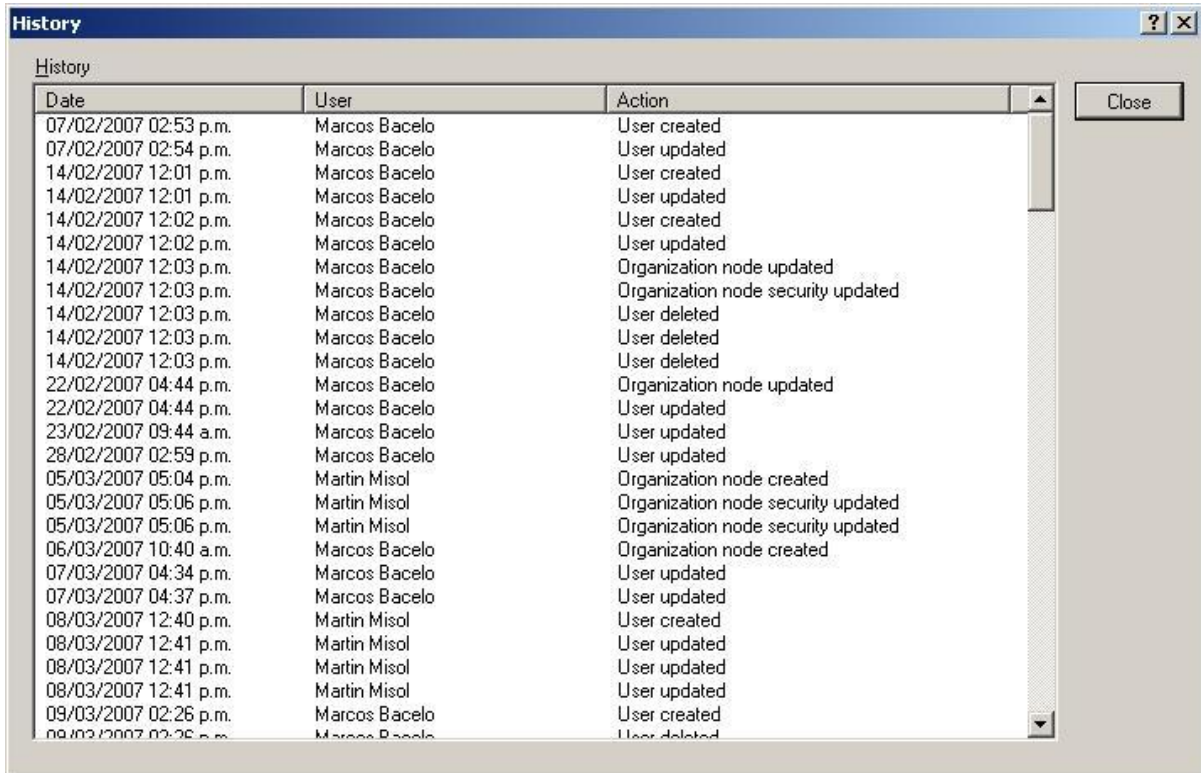


Figure 5 Node history

In the upper part of the panel there is also a toolbar. Figure 6 shows the elements of this bar, and describes their functions:

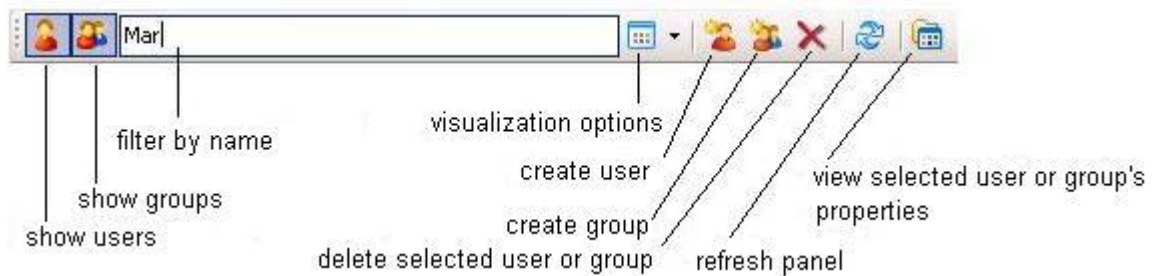


Figure 6 Panel toolbar

Below is a description of the options mentioned in the figure:

- **Show users:** shows or hides the users. If the button is activated (in the figure it is activated) they are shown, Otherwise, they are hidden.
- **Show groups:** shows or hides the groups.
- **Filter by name:** allows a small text to be written and filters the users and groups according to this text, showing only those users and groups whose names begin with that text.
- **Visualization options:** allows you to modify the way in which Q-flow shows the users and groups. The options are similar to those offered by Windows for viewing the files of a folder, and are as follows:
 - **Tiles:** this is the default option, and is shown in Figure 1. It shows the groups and users in a list of large icons. In addition to the name of each user or group, it shows its state (enabled or disabled).
 - **Icons:** shows the users and groups as large icons, one next to the other. In addition to the icon, it only shows the name of the user or group.
 - **List:** shows the users and groups as a list of small icons. This allows one to see more users and groups in the same amount of space.
 - **Details:** shows the users and groups as a list of small icons, and also shows the description and the state (enabled or disabled) for each user or group.
- **Create user:** creates a new user. When you click on this icon, Q-flow shows a window which allows you to enter the new user's name and description.
- **Create group:** creates a new group. When you click on this icon, Q-flow shows a window which allows you to enter the new group's name and description.
- **Delete selected user or group:** deletes the selected group or user, unless it is being used. In this case, Q-flow will show an error message.
- **Refresh panel:** reloads the users and groups, causing the panel to reflect modifications carried out in other computers since the last time it was loaded.
- **View the selected user or group's properties:** shows a window which allows you to modify the properties of the selected user or group.

Context menus

The Organization Model Manager allows you to perform some of the operations available in the tool bar through context menus. To open a context menu, right-click on the element on which you wish to carry out an operation. For example, to create a node in the tree, click on the node you want to contain the new node.

The tree's context menu also appears if you right-click on any part of the area where the tree is located. In that case, Q-flow supposes that the selected node is the root node. If you create a new node this way, Q-flow will create the new node within the root node.

The same happens with the context menus for group and user panels, but in that case, Q-flow does not consider there to be a selected group or user, and only the options that do not apply to any user or group in particular will have effect. These are the options "New" and "Refresh".

Figure 7 shows the hierarchy's context menu. Figure 8 shows the contextual menus for groups and users.

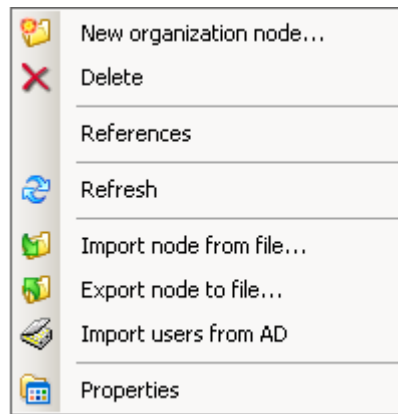


Figure 7 Node tree context menu

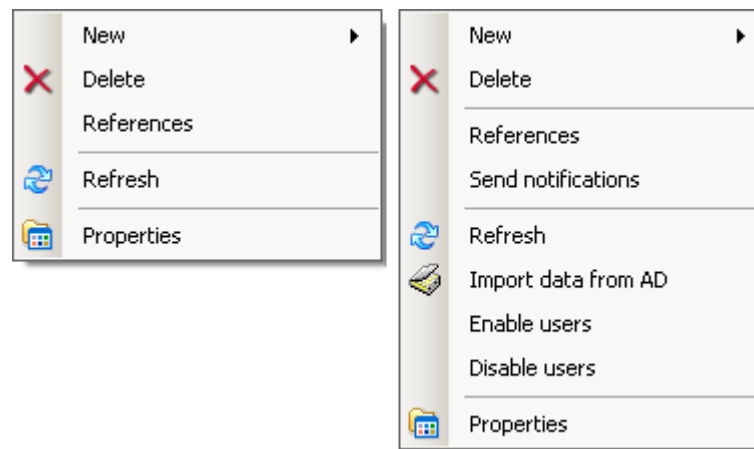


Figure 8 Group contextual menu (left) and user contextual menu (right)

A description of the operations of the contextual menus follows:

- **New organization node..:** creates an organizational node inside the node you clicked.
- **New**
 - **User:** creates a new user inside the selected node. It works even if you right-clicked on the panel. In this case, the selected node is the one that had been selected before, i.e. the one whose elements are being shown in the panel.
 - **Group:** creates a group inside the selected node. It works even if you right-clicked on the panel. In this case, the selected node is the one that had been selected before, i.e. the one whose elements are being shown in the panel.
- **Delete:** deletes the selected element.
- **References:** shows the elements that reference the selected object, including templates roles, security roles, nodes, groups and security definitions (Figure 9). For example, if a user is a member of a group, when viewing that user's references, this group will be shown.
- **Send notifications:** allows one to resend to a user messages corresponding to his active tasks.
- **Refresh:** updates the screen with the latest changes.
- **Import data from AD:** allows one to load a user's data with data imported from Active Directory. More details on this functionality can be found at "Importing user data from Active Directory".
- **Properties:** shows the selected element's property window.

- **Enable users:** enables all selected users.
- **Disable users:** disables all selected users.

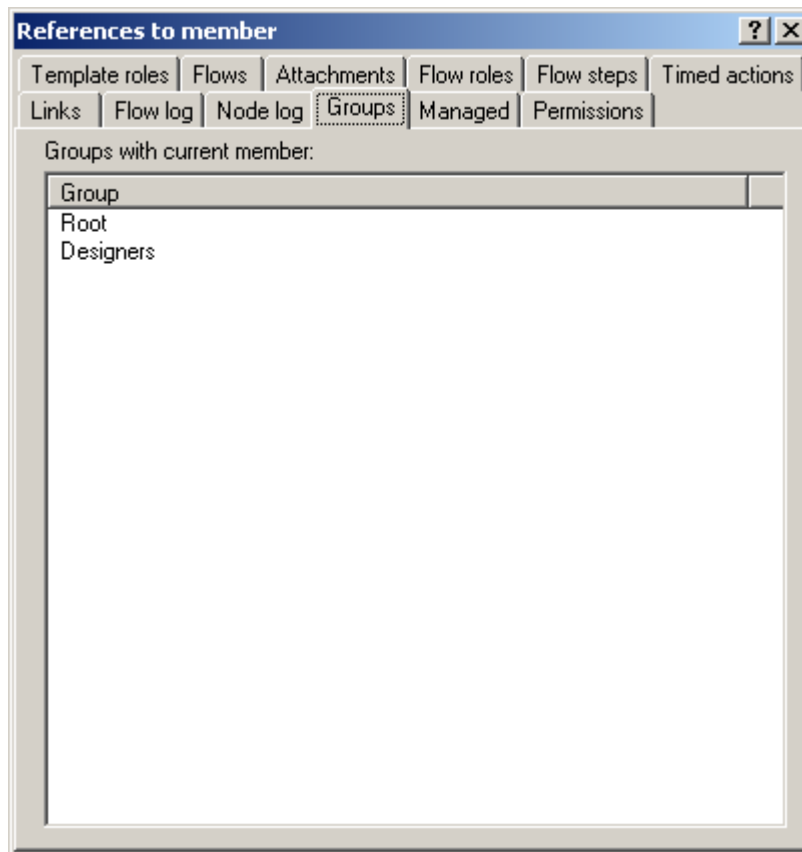


Figure 9 References to a user

Node properties

To modify a node's properties, click on the corresponding button on the toolbar (see Figure 2) or select the option "Properties" from the contextual menu. Q-flow will display the screen shown in Figure 10:

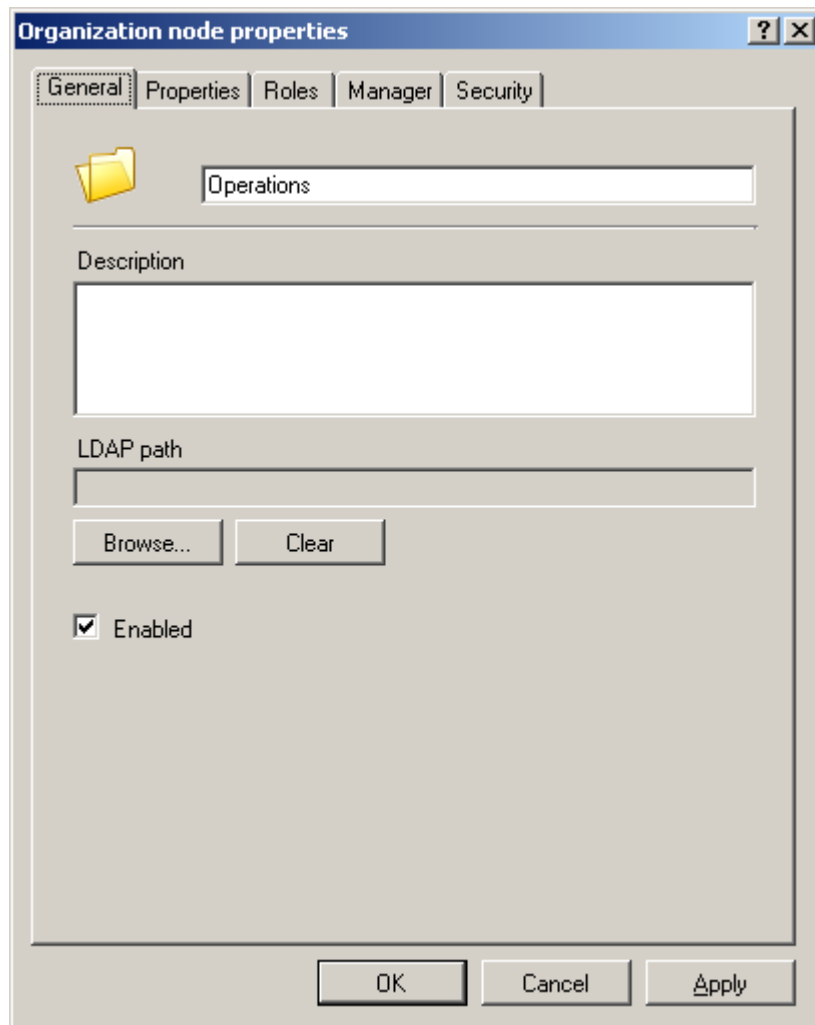


Figure 10 Node properties

The window divides the node's properties into four groups:

- **General:** name and description of the node.
- **Roles:** allows you to add or remove security roles to the node, so that it is associated with them.
- **Properties:** allows you to see and modify the node's extended properties. Extended properties are not defined in Q-flow. They are properties defined by your organization so that they complement the properties included in the product.
- **Manager:** shows the list of users and groups that act as the node's managers, and allows the list to be modified.
- **Security:** allows you to specify which users, groups and security roles have permissions for a node, and what these permissions are.

General

These are the same properties as those that can be modified when a node is created:

- **Name:** it is the name that appears next to the node in the tree. In Figure 10, the name is "Operations"

- **Description:** a brief description of the node.
- **Enabled:** allows you to enable or disable the node.
- **LDAP path:** the LDAP path to the corresponding node in Active Directory. Defining this path makes it possible to synchronize the node's data with the data stored in Active Directory without the need of specifying each time which Active Directory node corresponds to this node. It is sufficient to specify this path, which is stored by Q-flow, and Q-flow will use it to perform the synchronization (see "Synchronize with LDAP"). To choose this path:
 - Click on "Browse". This causes Q-flow to open a window like the one shown in Figure 11.
 - Select the domain you want, in the list that appears to the left of the "Load" button, and click on that button. This will load the list that appears in the lower part of the window (Figure 12). The window shows Active Directory organizational units, and allows you to select one of them, or a group. To view a group, open the organizational unit that contains it (Figure 13).
 - Select from the list the element you wish to associate to the node you are modifying and click on "OK". You may select a group or a node from Active Directory.

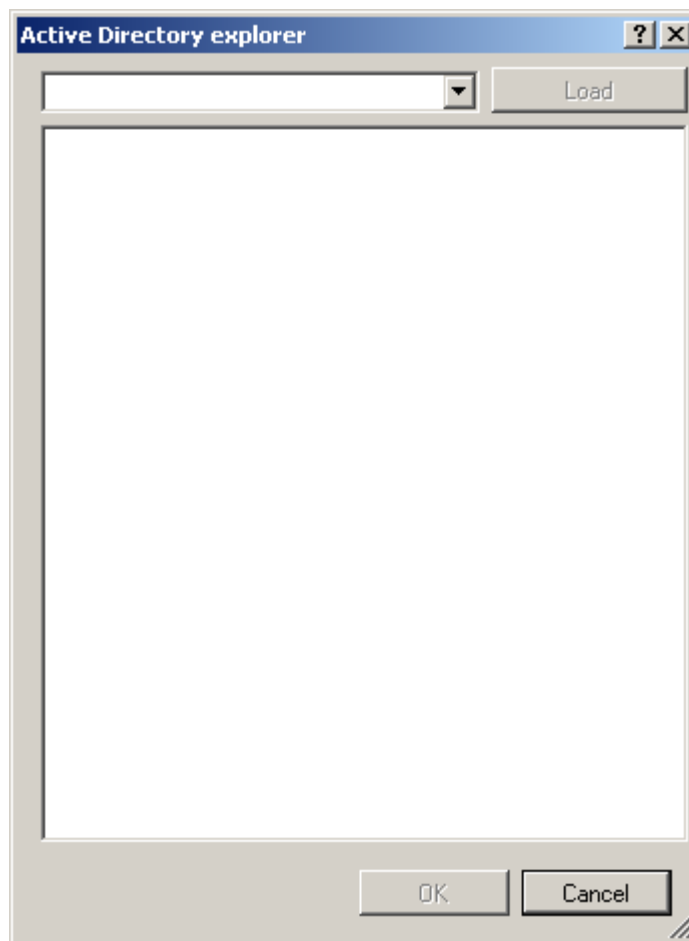


Figure 11 Selecting a node's LDAP path

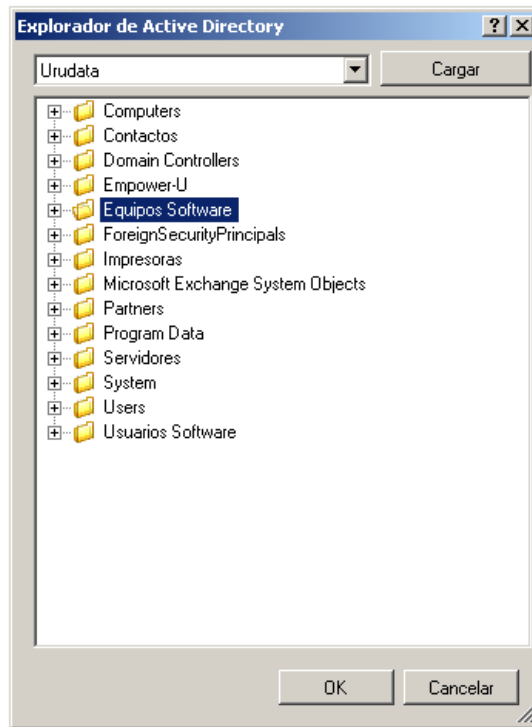


Figure 12 Active Directory explorer with loaded data

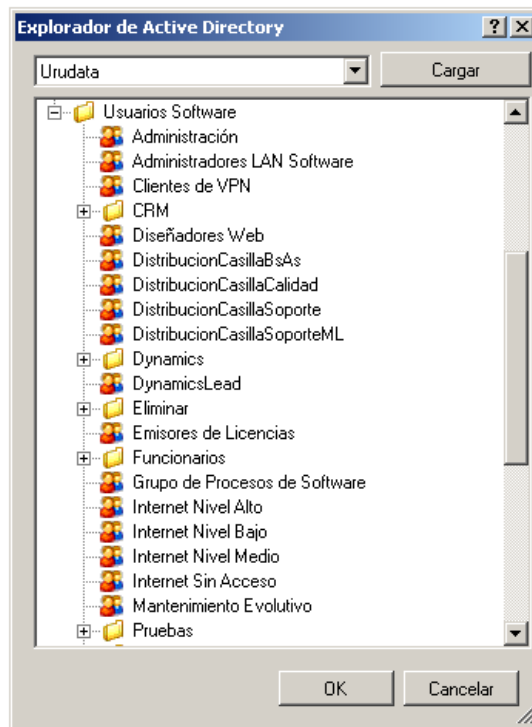


Figure 13 An open organizational unit with all its groups

Properties

The “Properties” tab shows the node’s extended properties. For more information on extended properties, see “Extended properties”.

Roles

The roles tab (see Figure 14) allows security roles to be added to and removed from the node.

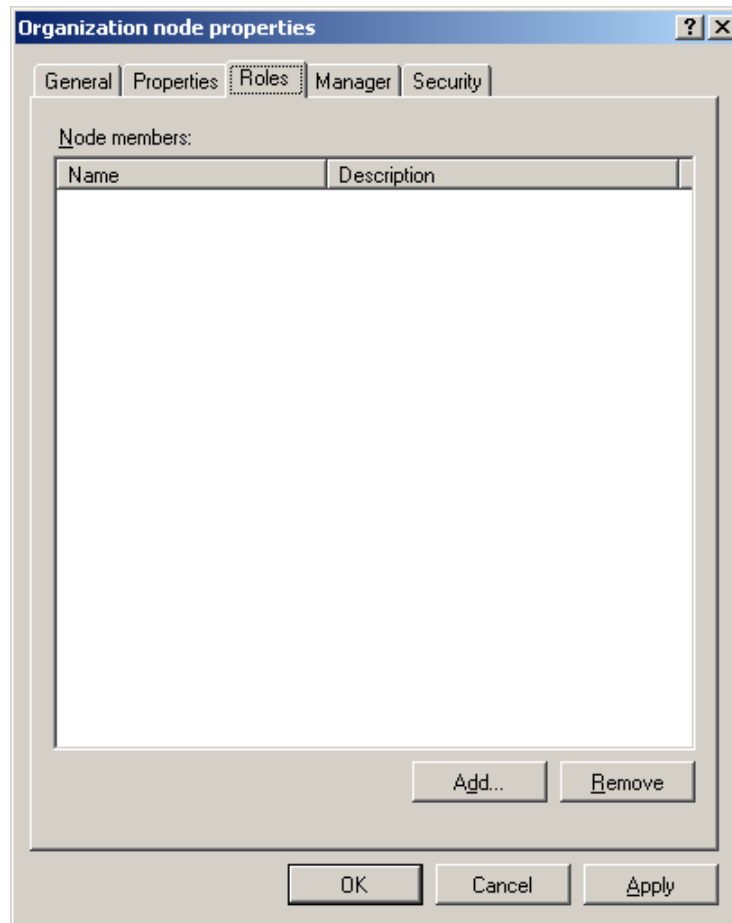


Figure 14 Window with the roles of a node

To add a role to a node:

1. Click on the button “Add...” Q-flow will display a window similar to the one shown in Figure 15.
2. Select the role you wish to add.
3. Click on “OK”.

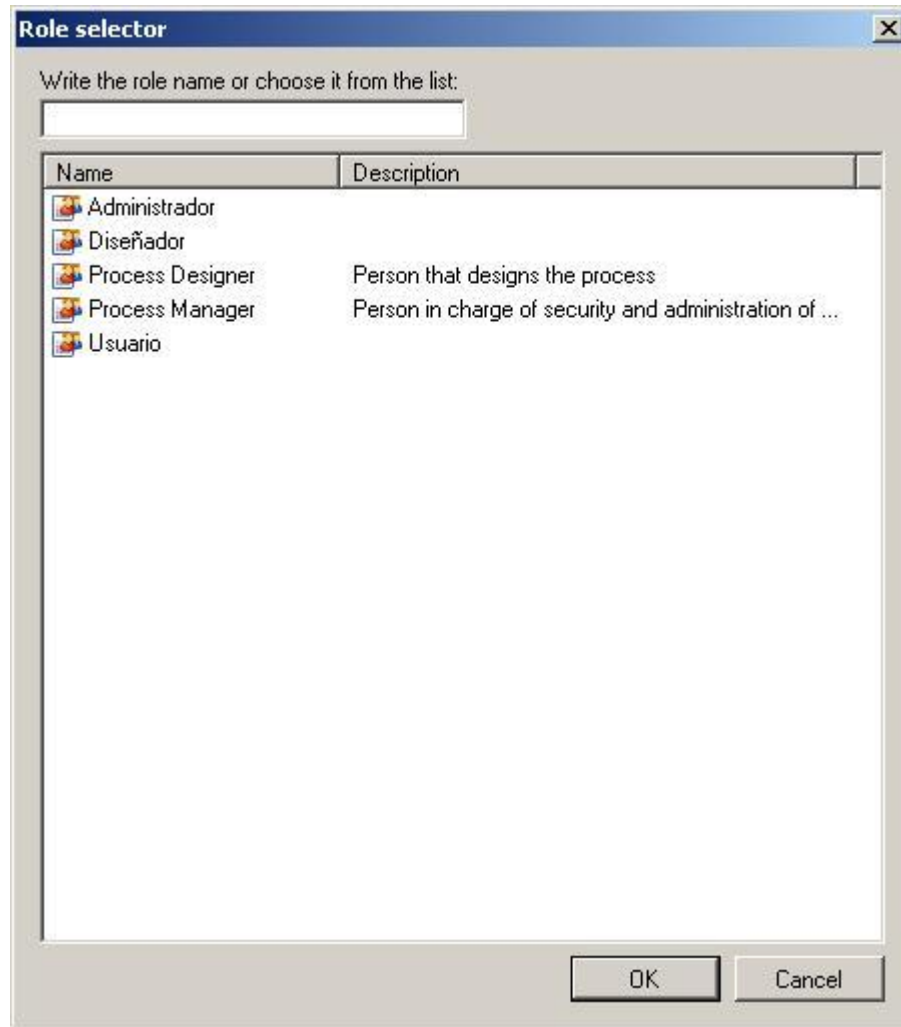


Figure 15 Window for selecting the role to be added to the node

To remove a role, select it and click on “Remove”. Note that this does not delete the role. It only removes it from the role list of the node that is being modified.

Managers

The managers tab (see Figure 16) allows users and groups to be added to or removed from the node’s list of managers.

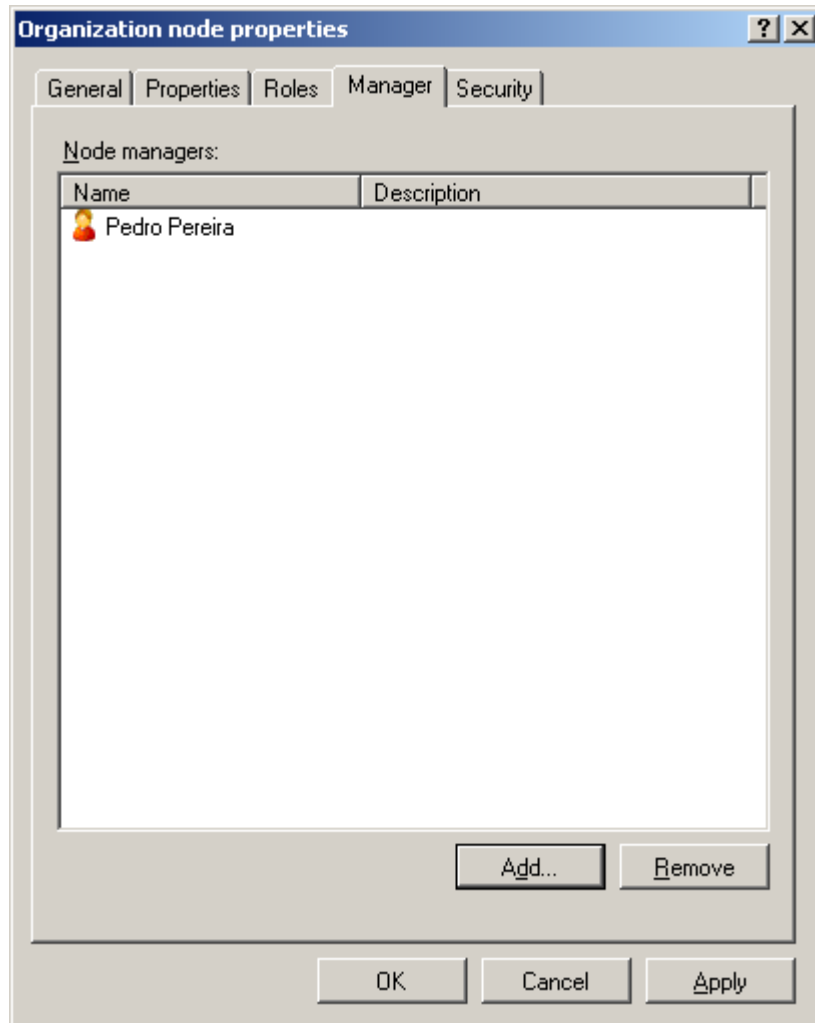


Figure 16 Window that allows managers to be added or removed

To add a manager:

1. Click on the button "Add..." Q-flow will display a window similar to the one shown in Figure 17.
2. Select the user or group you wish to add as a manager. It is possible to select several users or several groups by holding down the "Control" key while the selection is made.
3. Click on "OK".

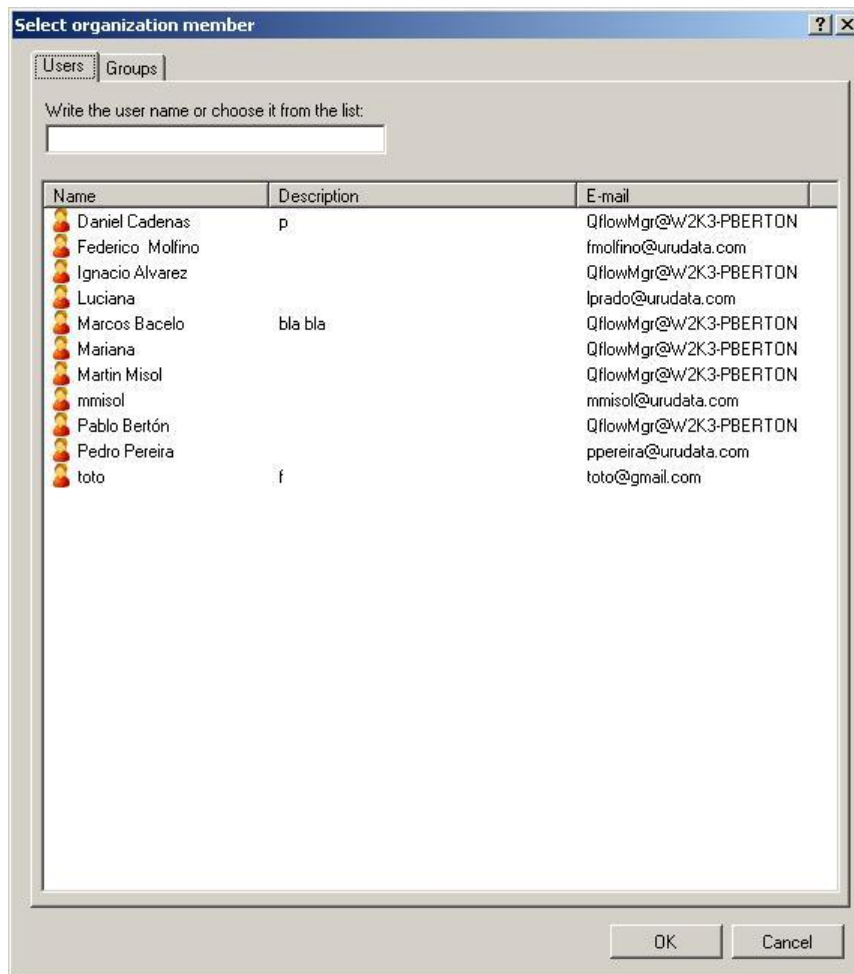


Figure 17 Window allowing users and groups to be chosen and added as managers

Security

The security tab (see Figure 18) allows you to define who has permissions to perform operations on the node, and what those permissions are. The entities that may be related to permissions for a node are the users, groups and security roles.

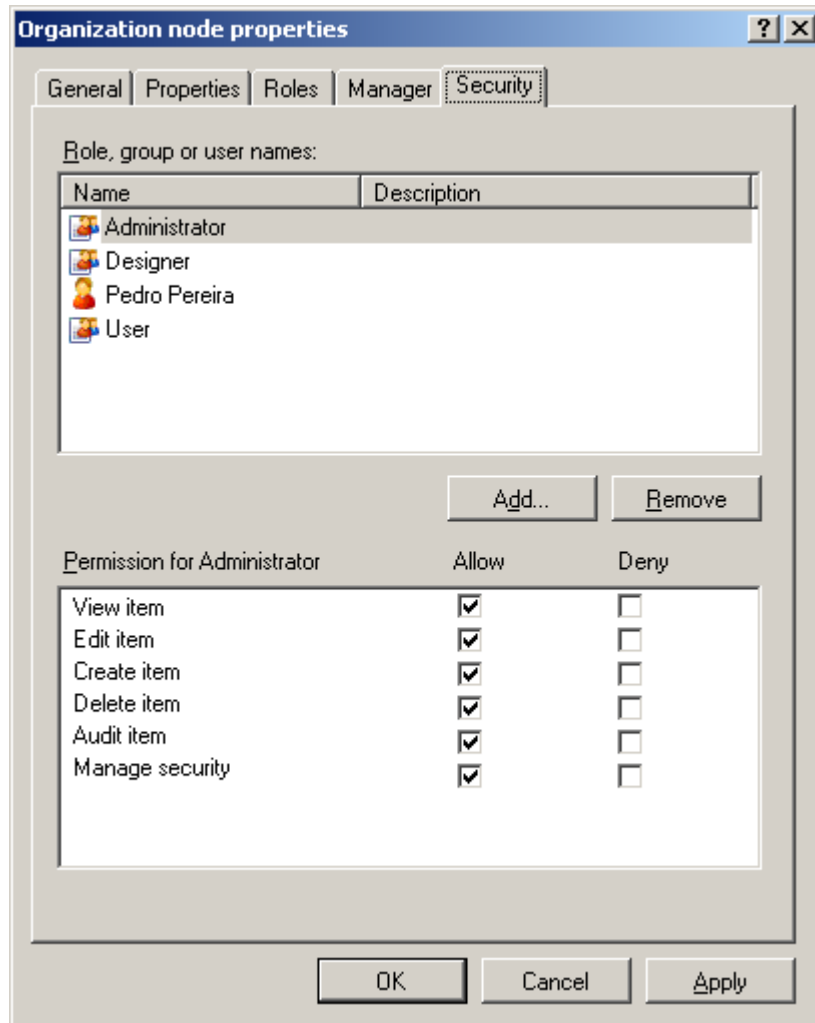


Figure 18 Security settings for a node

To add a user, group or security role to the group of entities that has permissions over nodes:

1. Click on the "Add..." button. Q-flow will display a window similar to the one shown in Figure 19.
2. Select the entity you wish to add. By default, the window shows users, but the window can be made to show roles or groups by changing the selection where it says "Role type". In Figure 19, the checked option is "Groups", and therefore the window shows groups.
3. Click on "OK".

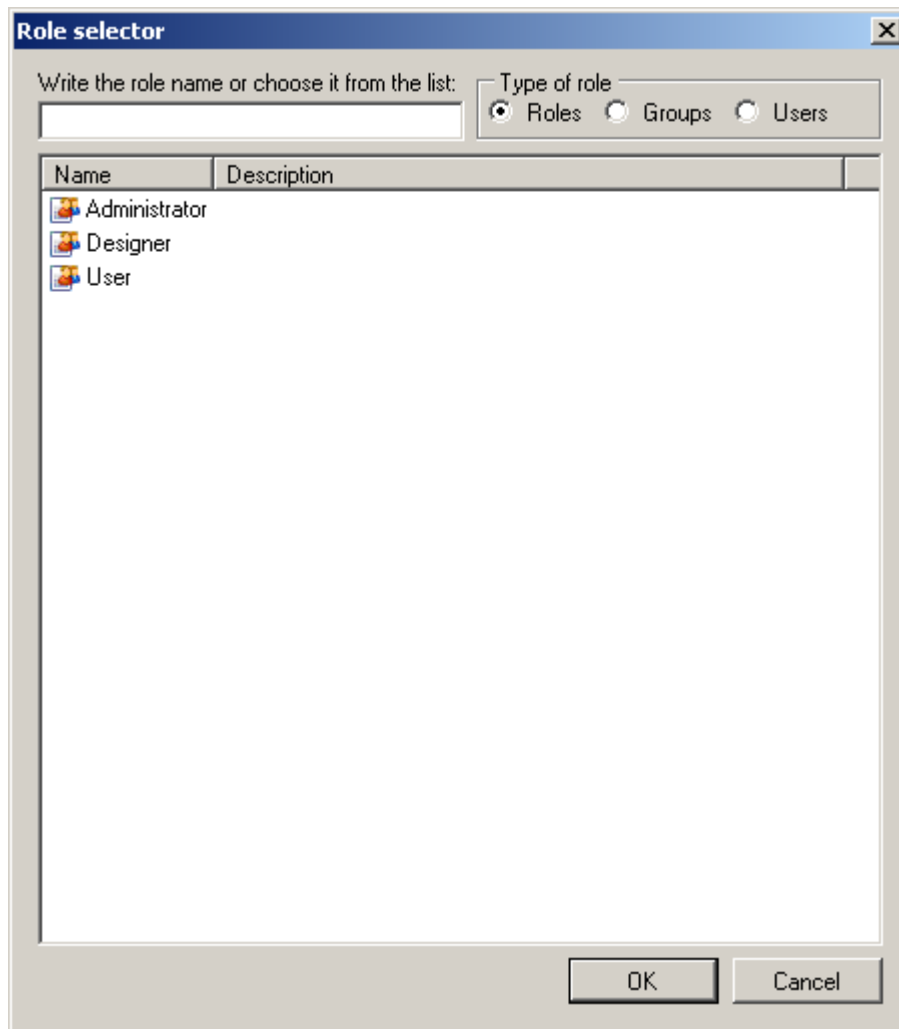


Figure 19 Window for adding a role, group or user

Once the users, roles and groups have been added, you may define which permissions each one of them will have. This is done by checking “Allow” or “Deny” next to each permission that appears in the lower part of the screen.

The possible permissions are:

- **View item:** allows the node to be seen, but not modified.
- **Edit item:** allows the node to be modified
- **Create item:** allows nodes to be created within the node.
- **Delete item:** allows the node to be deleted.
- **Audit item:** allows auditory information about the node to be visualized.
- **Manage security:** allows permissions on the node to be added and modified for users, groups, or roles.

Group Properties

To modify the properties of a group, click on the corresponding button from the tool bar (see Figure 2) or select the option “Properties” from the contextual menu. Q-flow will display the screen shown in Figure 20:

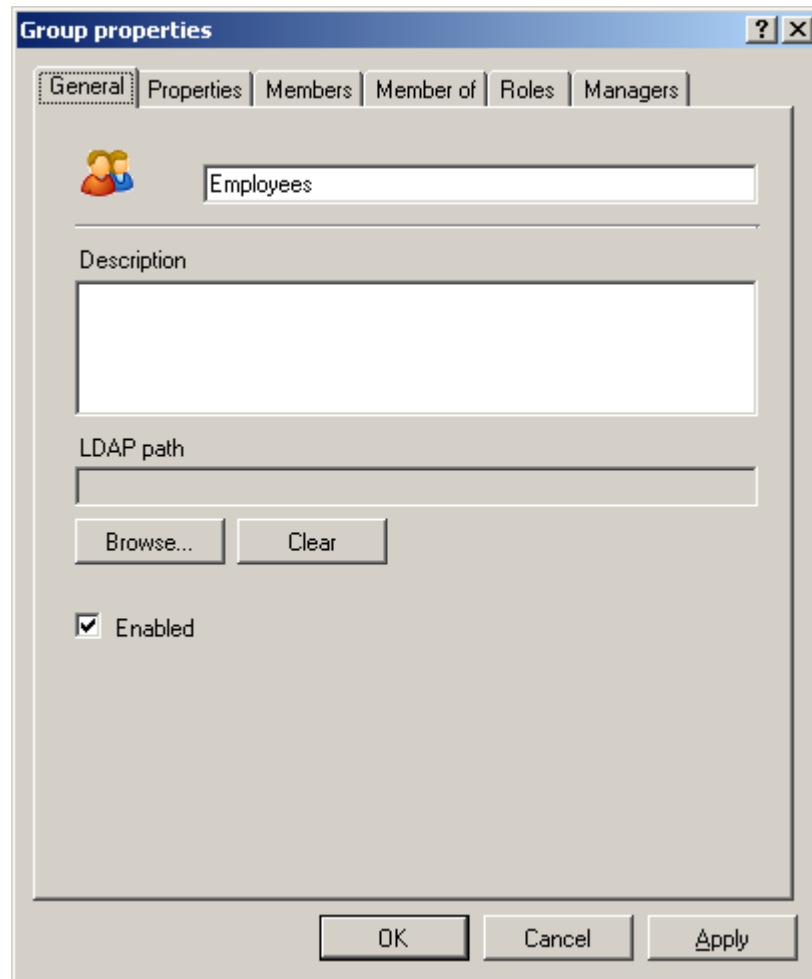


Figure 20 Group properties

The window divides a group's properties into six groups:

- **General:** name and description of the group. The “Enabled” checkbox allows you to enable or disable the group.
- **Properties:** allows you to see and modify the group's extended properties.
- **Members:** allows you to add or remove users and groups to the group.
- **Member of:** shows the groups to which the group being edited belongs.
- **Roles:** allows security roles that are associated to the group to be added or removed. It works in the same manner as the “Roles” tab of the node properties window.

- **Managers:** shows the list of users and groups that act as the groups's managers, and allows the list to be modified. It works in the same manner as the "Managers" tab of the node properties window.
- **Security:** allows you to specify which users, groups and security roles have permissions over the group, and what those permissions are. It works in the same manner as the "Security" tab of the node properties window.

General

The general properties are:

- **Name:** it is the group's name. This is the name Q-flow displays next to the icon that represents the group. In Figure 20, the name of the group is "grupox".
- **Description:** a brief description of the group.
- **Enabled:** checking or unchecking this box enables or disables a group. A disabled group is not taken into consideration by Q-flow, but can be re-enabled.
- **LDAP path:** the LDAP path corresponding to the group in Active Directory. Defining this path makes it possible to synchronize the group's data with data stored in Active Directory without the need of specifying each time which element in Active Directory corresponds to this group. It is sufficient to specify this path, which is stored by Q-flow, and Q-flow will use it to perform the synchronization (see "Synchronize with LDAP"). The procedure for modifying it is the same as the procedure for modifying the LDAP path of a node, which is described above.

Properties

The "Properties" tab shows the group's extended properties. For more information on extended properties, see "Extended properties".

Members

The members tab shows the users and groups who are members of the group, and allows more members to be added, or members to be removed. Figure 21 shows the members tab.

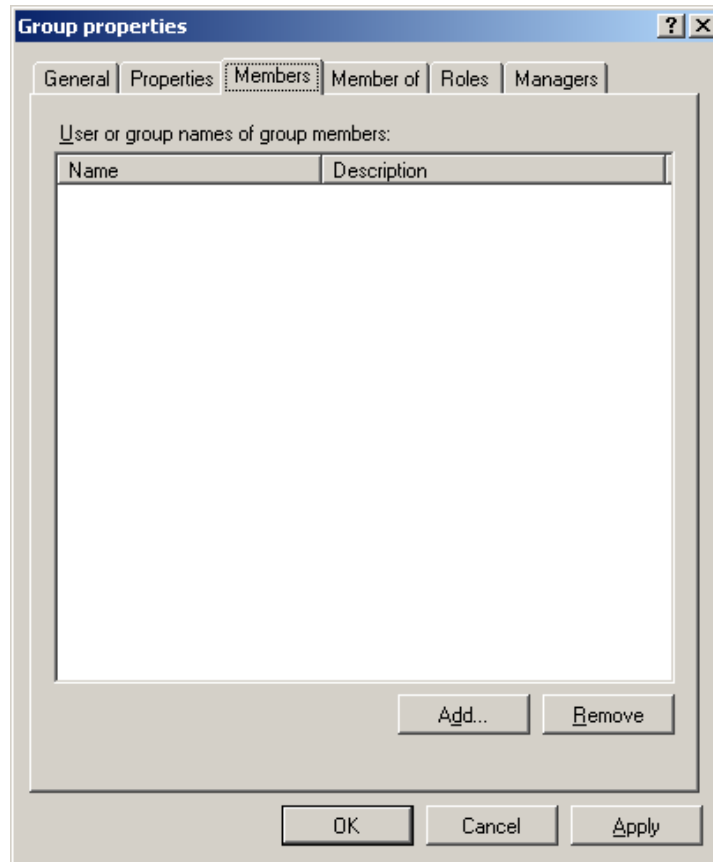


Figure 21 Members of a group

To add a member to a group:

1. Click on the "Add..." button. Q-flow will display a window similar to the one shown in Figure 17, which allows users or groups to be chosen.
2. Select the user or group you wish to add as a member. It is possible to select several users or groups by holding down the "Control" key while making the selection.
3. Click on "OK".

User Properties

To modify a user's properties, click on the corresponding button from the toolbar (see Figure 2) or select the option "Properties" from the contextual menu. Q-flow will display the screen shown in Figure 22:

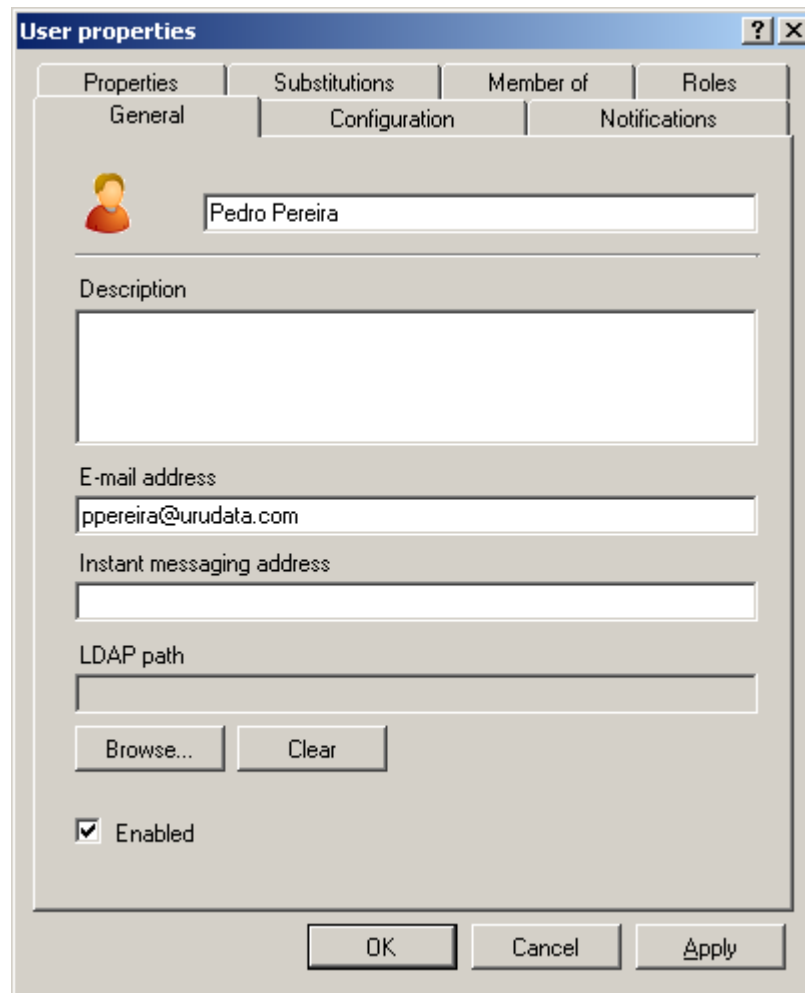


Figure 22 A user's properties

The window divides a user's properties into seven groups:

- **General:** contains the properties that identify the user and make it possible to enable and disable it.
- **Configuration:** allows you to define the user's credentials and calendar.
- **Notifications:** contains the user's mail options, used to send them notifications.
- **Properties:** allows the user's properties to be added.
- **Substitutes:** allows user's substitutes to be defined.
- **Member of:** shows the groups to which the user belongs.
- **Roles:** allows security roles that are associated to the user to be added and removed. It works in the same manner as the "Roles" tab of the node properties window.

General

The general properties are:

- **Name:** it is the user's name.
- **Description:** a brief description of the user.
- **Instant messaging address**

- **LDAP path:** this is the LDAP path corresponding to the user in Active Directory. Defining this path makes it possible to synchronize the user's data with the corresponding data in Active Directory without the need of specifying each time which Active Directory element corresponds to this user. It is sufficient to specify this path, which is stored by Q-flow, and Q-flow will use it to perform the synchronization (see "Synchronize with LDAP"). The procedure for modifying it is the same as the procedure that makes it possible to import the user's data (see "Importing user data from Active Directory"). The windows that appear are the same, and you must select a user from Active Directory. The difference is that, at the end of the process, the user's data are not imported, but the user's LDAP path is changed.
- **Enabled:** checking or unchecking this box enables or disables the user. A disabled user is not taken into consideration by Q-flow, but can be re-enabled.

Configuration

The configuration tab (Figure 23) has the following properties:

- **Security Provider:** the security provider that authenticates the user (for example, the Windows domain).
- **Login name:** the user's user name.
- **Calendar:** the calendar that defines the user's working hours. Different users can be managed by different calendars. It is useful, for example, in the case of organizations with subsidiaries in several different countries that have different working hours and holidays.



The image shows a screenshot of the 'User properties' dialog box, specifically the 'Configuration' tab. The dialog box has a title bar with a question mark and a close button. Below the title bar are four tabs: 'Properties', 'Substitutions', 'Member of', and 'Roles'. The 'Configuration' tab is selected and active. Underneath the tabs are three sub-tabs: 'General', 'Configuration', and 'Notifications'. The 'Configuration' sub-tab is selected. The main area of the dialog box contains the following fields and controls:

- 'User credentials' label with a text input field.
- 'Security provider' label with a dropdown menu showing 'Urudata'.
- 'Login name' label with a text input field containing 'fmolfino'.
- 'User configuration' label with a text input field.
- 'Calendar' label with a dropdown menu showing 'Default calendar'.

At the bottom of the dialog box are three buttons: 'OK', 'Cancel', and 'Apply'.

Figure 23 User configuration

Notifications

The notifications tab (Figure 24) allows the mail options to be configured.

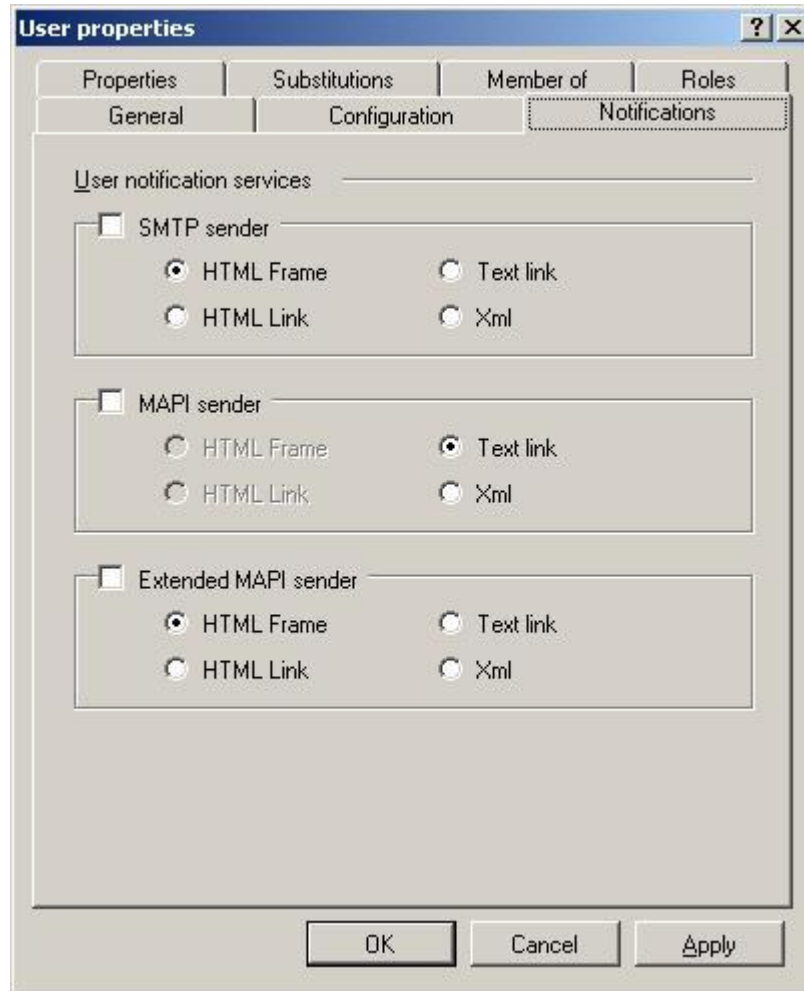


Figure 24 Mail options

The mail configuration presents four non exclusive options for sending mail:

- **SMTP sender:** if this option is checked, the SMTP mail engine will send the notifications.
- **MAPI sender:** if this option is checked, the MAPI (Exchange) mail engine will send the notifications.
- **Extended MAPI sender:** if this option is checked, the Extended MAP mail engine will send the notifications. The extended MAPI engine allows embedded HTML to be sent, and therefore messages sent this way can be visualized correctly from any client's mail. This is not possible with the common MAPI engine.

For each one of the previous options, there are also several ways to send mail:

- **HTML Frame:** does not send the entire message, but rather sends a message which, when opened by certain mail clients (for example, Outlook Express), causes the mail recipient to

- navigate to a server page. This page contains the message body. This option is not available for the MAPI engine.
- **HTML Link:** Q-flow sends an HTML formatted message which has a link to a page that contains the message body. This option is not available for the MAPI engine.
 - **Text Link:** this option is similar to the previous one, but the message is sent without HTML format, like a plain text with a link that can be recognized by some mail clients (for example, Lotus Notes).
 - **Xml:** this option sends the message as an XML document that can be interpreted by some applications.

Properties

The “Properties” tab shows the user’s extended properties. For more information on extended properties, see “Extended properties”.

Substitutions

The substitutions tab (Figure 25) allows a user’s substitutes (replacements) to be defined for certain periods. This way, if a user is on vacation, a substitute can be defined for the period in which the user is absent, and Q-flow will send the substitute all the messages that originally were addressed to the user. Thus, the substitute can carry out all of the Q-flow tasks of the replaced user.

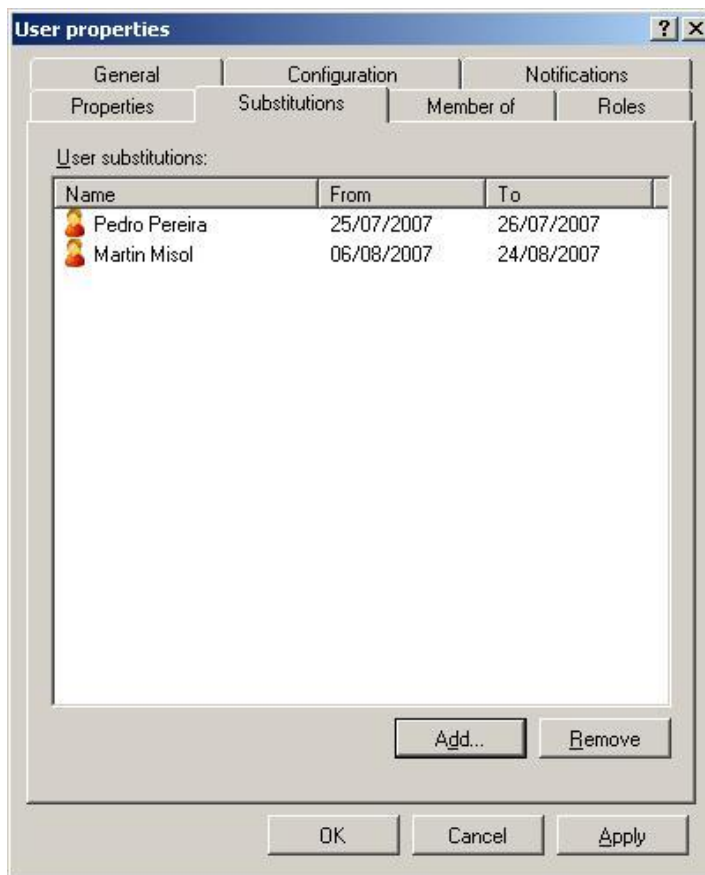


Figure 25 Substitution definition window

To add a substitute:

1. Click on the “Add...” button. Q-flow will open a window like the one shown in Figure 26.
2. Select the user who will be the substitute, the date the substitution will start and the date the substitution will end. To select the user who will be the substitute, click on the “Select” button. Q-flow will open a window that allows a user to be selected, but also allows a group to be selected. If a group is selected, all the members of the group can act as substitutes.
3. Click on “OK”.

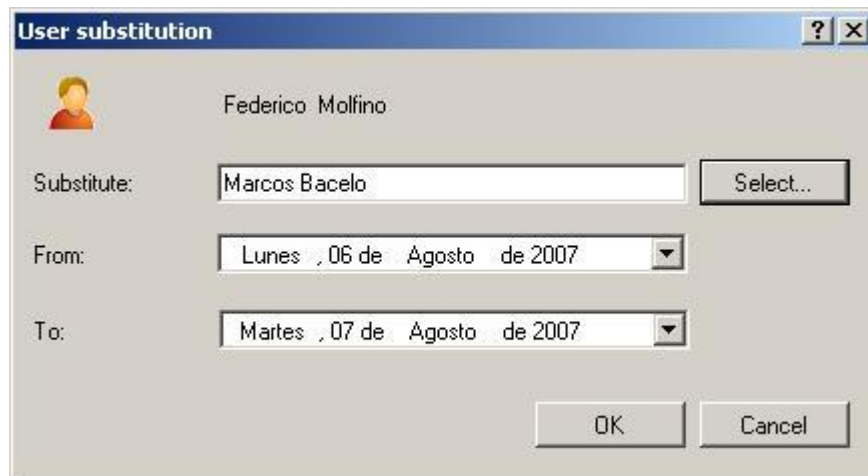


Figure 26 Add substitute

It is possible to add several substitutes.

Importing users from the Active Directory

Q-flow can import users from Active Directory. To import users to a node, do the following:

1. Right-click on the node where you wish to import the users and select from the contextual menu the option “Import users from AD”. Q-flow will show a window like the one that appears in Figure 27.
2. Near the upper left hand corner of the window opened by Q-flow, there is a list that shows the available domains. Select the desired domain and click on “Load”. This causes Q-flow to show this domain’s nodes (Figure 28).
3. Select the node that contains the users you wish to import. When selecting a node with users, the list of users is shown in the panel on the right. By default, when a node is selected, all users of that node are selected. You may select users individually with the mouse, or select several users by holding the Ctrl key and clicking on the users you wish to select. In the lower part of the window is the following option:
 - a. **Update user if it already exists:** check this option if, in the case of users from Active Directory that already exist, you only want to update their data, instead of creating new Q-flow user accounts.
4. Click on “OK”.

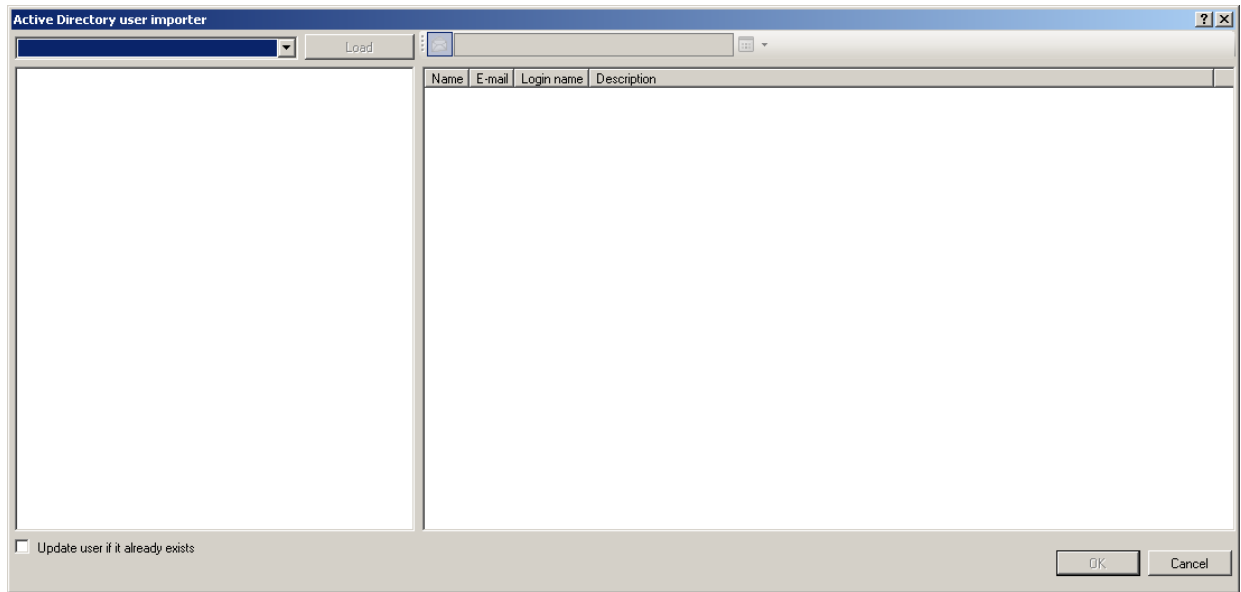


Figure 27 Active Directory node importer

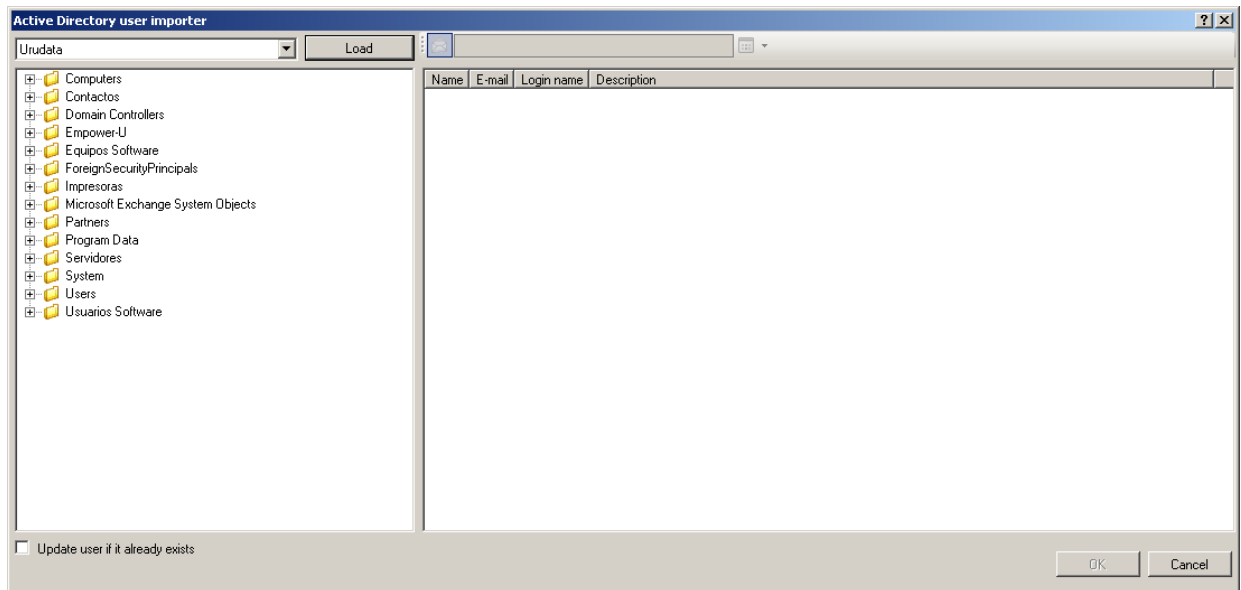


Figure 28 Active Directory node importer with a loaded domain

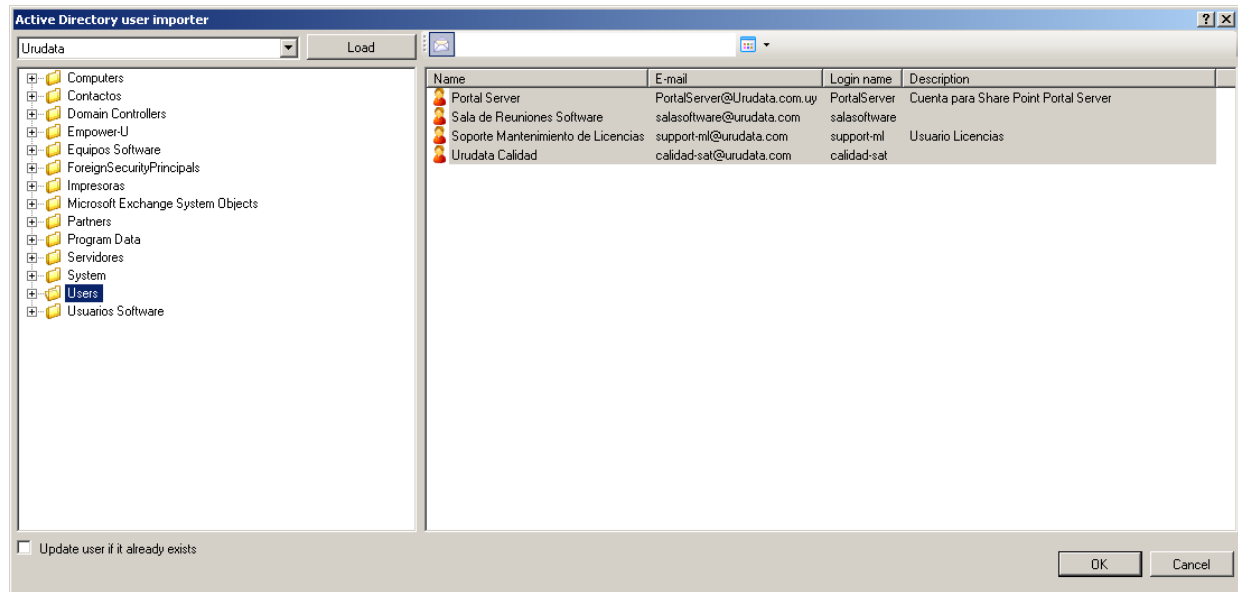


Figure 29 Active Directory node importer: the node's users are shown on the right.

Importing user data from Active Directory

As well as importing users from Active Directory, the information for a certain user that already exists in Q-flow can be imported. This allows this user's data to be updated. It is also used, after a user is created, to load their data from Active Directory (although in this case it is probably easier to directly import the user). To import a user's data, do the following:

1. Right-click on the user whose data you wish to import, and select the option "Import data from AD" from the contextual menu. Q-flow will show a window like the one in Figure 30.
2. In the list that appears below, where it says "Active Directory Provider", select the Active Directory domain to which the user whose data you wish to load belongs.
3. Click on "Load". This causes Q-flow to load the node tree of the selected domain into the left section of the window (Figure 31).
4. Select the node where the Active Directory's user whose data you wish to load is found. This causes Q-flow to show all the users of this node (Figure 32). If there are many users in this node, you can filter the user list by using the text box that appears above the list (Figure 33, in the figure only users whose names contain the combination "Mart" are shown). If you had created a user and you import its data, that user's name will be changed so that it is the same as the imported name.

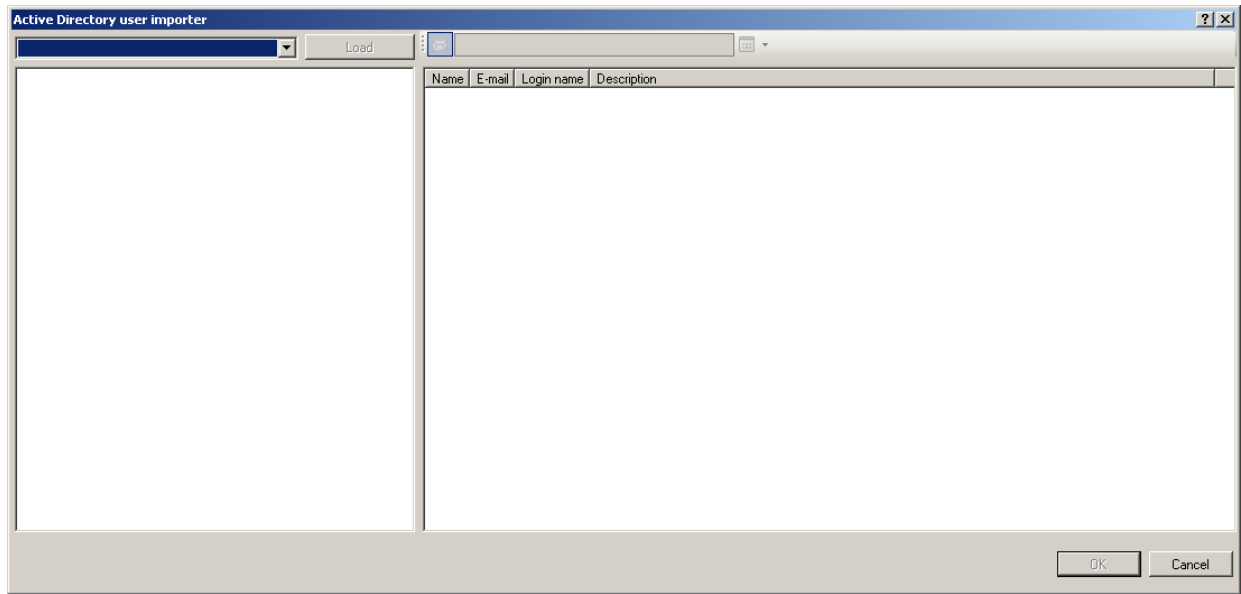


Figure 30 Active Directory data importer

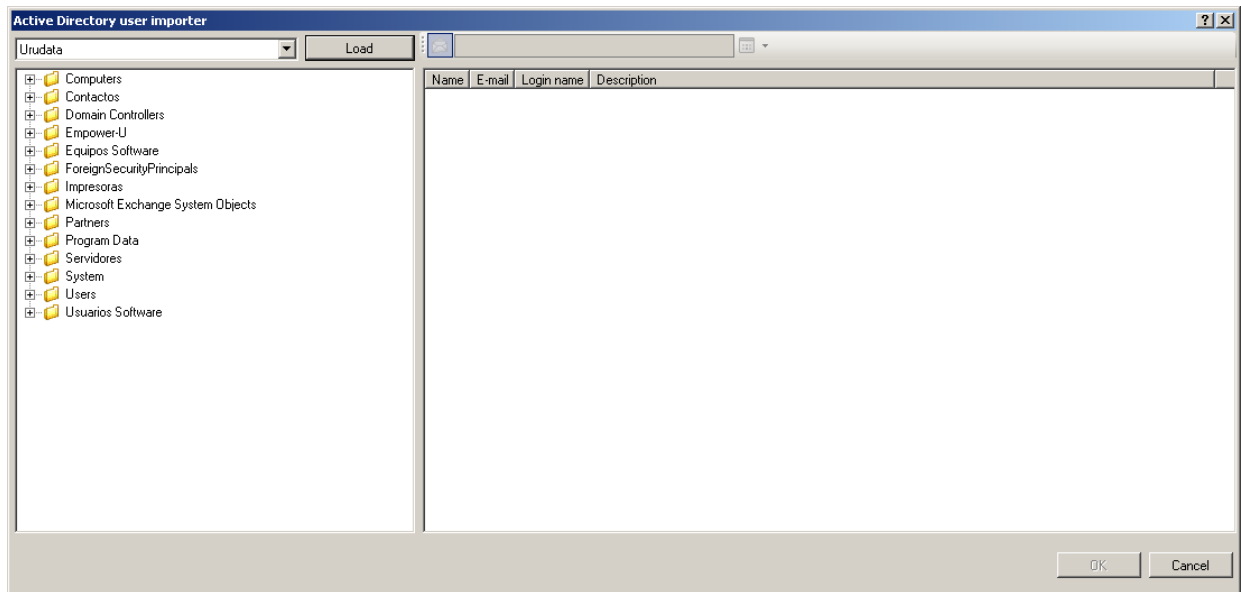


Figure 31 Active Directory data importer with the selected domain

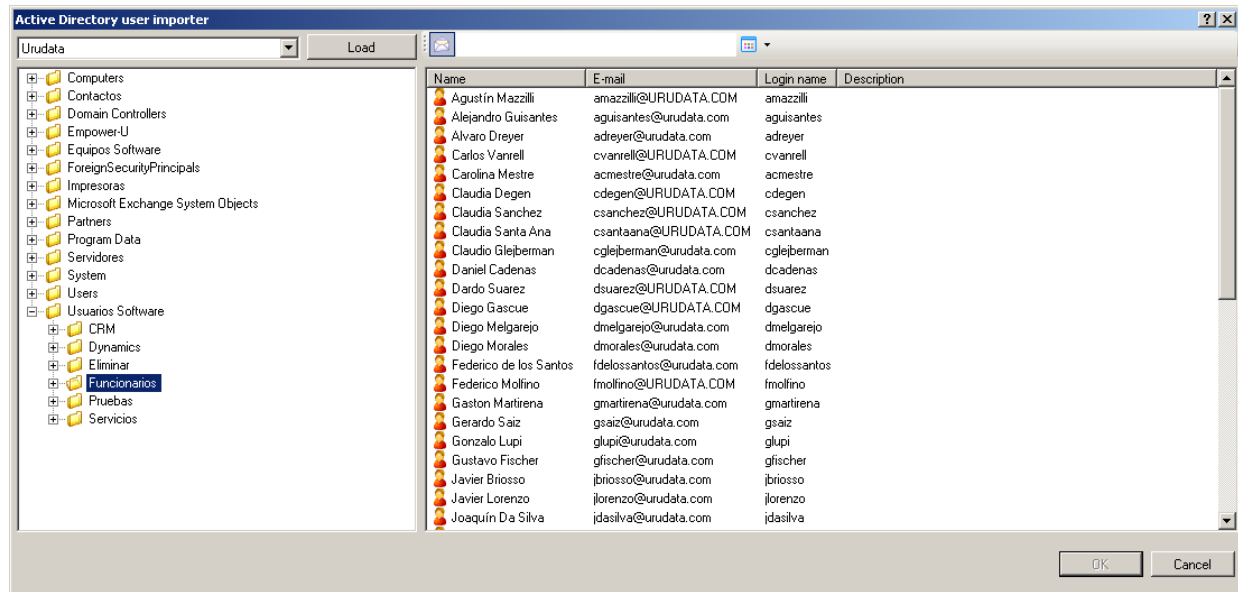


Figure 32 Active Directory data importer with loaded users

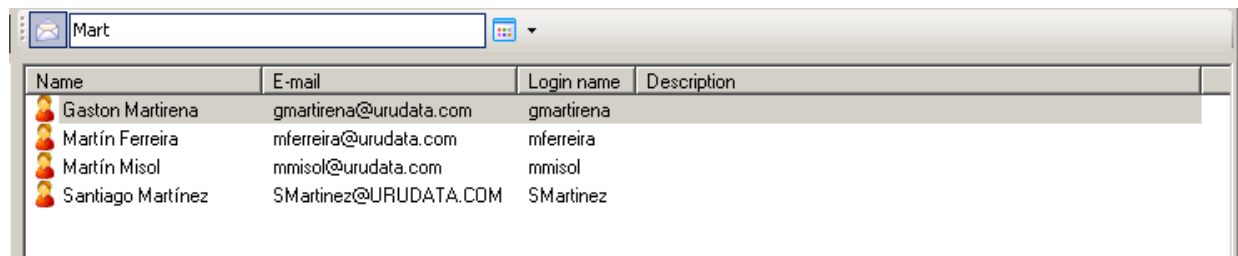


Figure 33 Filtered list of users

File: importing, exporting and synchronizing with LDAP

This section describes the options in the “File” menu.

Import from file

This option allows you to import the whole organization model from a file. The file must be the result of exporting the whole organization model in some environment where Q-flow is installed (see “Export to file”).

When the contents of a file is imported this way, the whole structure of the organization model is imported, and each node or element will be placed inside the node specified in the file. This behavior is not the same as when a file is imported from a node.

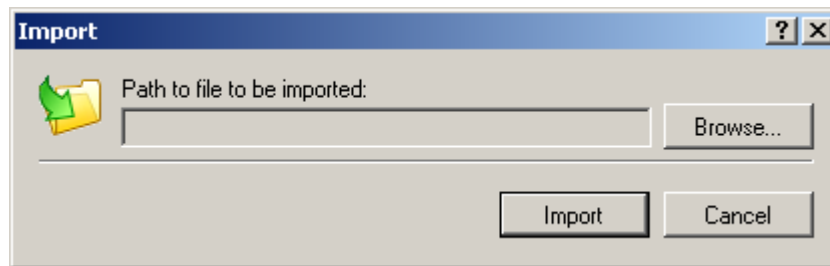


Figure 34 The window that imports the organizational model

Importing the Q-flow 2.3 organizational chart

When importing the organizational model from a file, there are two possible options:

- Q-flow organization model.
- Q-flow 2.3 organizational chart

The second option, “Q-flow 2.3 organizational chart”, makes it possible to choose an XML file resulting from exporting the Q-flow 2.3 organizational chart and to import the data from this file into Q-flow 3.0. During the process, Q-flow converts elements specific to Q-flow 2.3 into Q-flow 3.0 elements.

This operation has the following characteristics:

- Security providers and calendars are not imported. Therefore, Q-flow assigns all imported users the default calendar and the default security provider.
- Work queues are not available in Q-flow 3. Q-flow converts Q-flow 2.3 work queues into groups when they are imported into Q-flow 3. Users that are members of a queue in Q-flow 2.3 become users of the group into which the queue has been converted.
- Users do not have managers in Q-flow 3, but they do in Q-flow 2.3. When the Q-flow 2.3 organizational chart is imported, a group is created for each user that is a manager of some other user. All users managed by him are included as members of this group, and the user is set as manager of that group.

Export to file

The “Export to file” option makes it possible to export into a file the whole structure and contents of the organization model. This file can later be imported into another Q-flow environment.

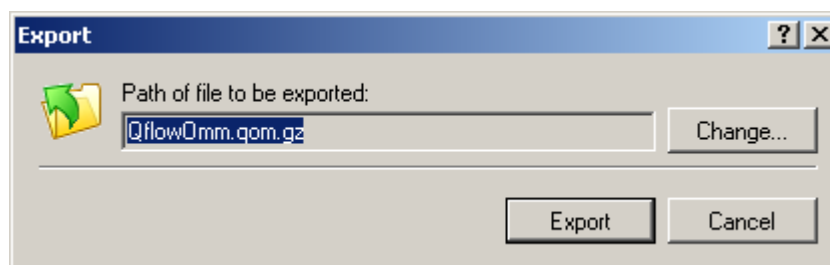


Figure 35 Organization model export window

Synchronize with LDAP

Synchronization with LDAP uses the LDAP paths defined for each element of the tree (groups, nodes and users) to update their data. When a user clicks on “Synchronize with LDAP”, Q-flow goes through the three and updates the data of each node and group as well as the data of the users in each node and group. If it finds, inside a node of the directory, a user that is not in the corresponding Q-flow node, it adds that user. It does the same with groups.

Configuration

This section describes the options from the “Configuration” menu.

Security providers

The “Security providers” option allows you to define security providers (for example, Windows domain). Q-flow uses security providers to authenticate its users.

When you select this option from the menu, Q-flow opens a window like the one shown in Figure 36. The window shows a list with all of the defined security providers, and allows you to add new security providers, delete existing ones and modify their properties.

To add a security provider:

1. Click on the “Add...” button .Q-flow opens the security provider’s properties window (Figure 37).
2. Fill in the property values (explained further on).
3. Click on “OK”.

To delete a security provider, select it and click on “Delete”.

To edit a security provider, select it and click on “Edit”. Q-flow will display the provider properties window.

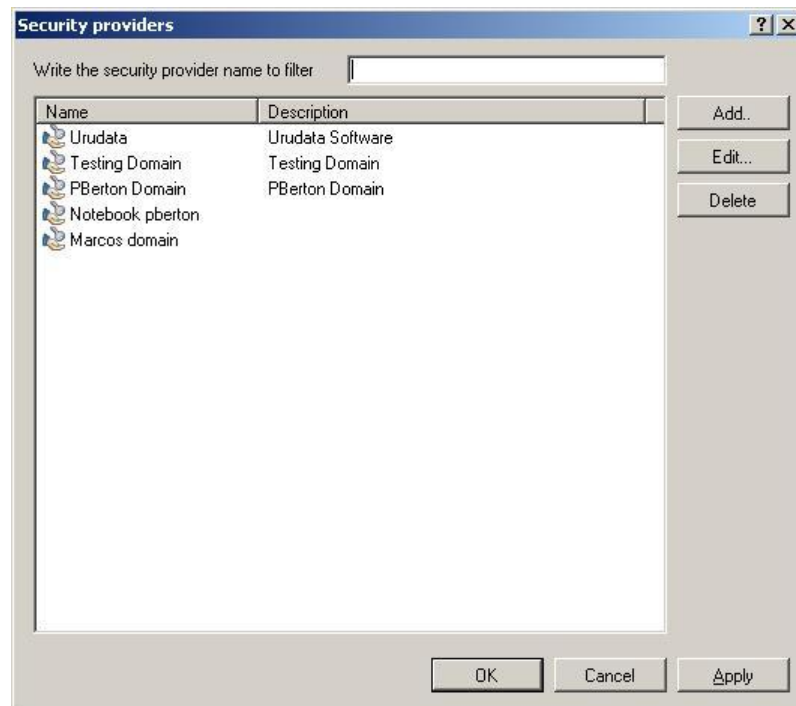


Figure 36 Security providers' management window

Security providers properties

Once a security property is created or edited, Q-flow will display a window like the one shown in Figure 37. This window allows you to edit the provider's properties:

- **Name:** descriptive name given to the security provider. It is the name Q-flow will display when opening a window in which a security provider must be chosen (for example, in a user's properties window).
- **Description:** brief description of the security provider. It does not matter if it is left empty.
- **Directory service type:** indicates the providers' directory service type (NT Domain or Active Directory).
- **Full Qualified Domain Name:** Characteristic domain name (FQDN).
- **NetBios Name**
- **Enabled:** this checkbox enables or disables de security provider.



Figure 37 Security provider's properties window

Security roles

The "Security roles" option allows you to define security roles that may be associated with nodes, groups and users. When you select this option, Q-flow opens a window like the one shown in Figure 38. The window has a list of defined security roles, and allows you to add new roles and delete or edit existing ones.

To add a security role:

- Click on the "Add..." button. Q-flow will open a window like the one shown in Figure 39.
- Fill in the role's property values (explained further on).
- Click on "OK".

To delete a role, select it from the list and click on "Delete".

To modify a security role's properties, select it from the list and click on "Edit". Q-flow will open a window which allows the role's properties to be modified.

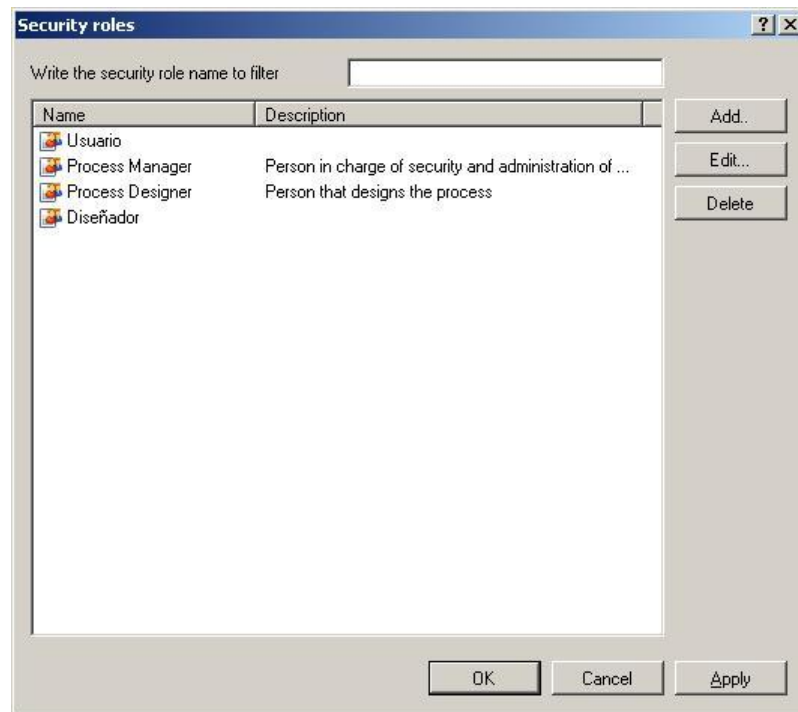


Figure 38 Security roles management window

Security roles properties

Figure 39 shows the window Q-flow opens when it is adding or editing a security role.



Figure 39 Security roles properties

Security roles have three properties:

- **Name:** descriptive name of the security role. It is the name that appears when a security role must be chosen.
- **Description:** brief description of the security role.
- **Enabled:** this box allows you to enable or disable the security role.

Calendars

The “Calendars” option from the configuration menu allows you to define calendars so that different users may have different working days and hours, according to their calendars. This is useful, for example, when an organization has subsidiaries in different countries and, therefore, these subsidiaries use different calendars (holidays, work schedule, etc.)

When this option is selected, Q-flow will open a window like the one shown in Figure 40.

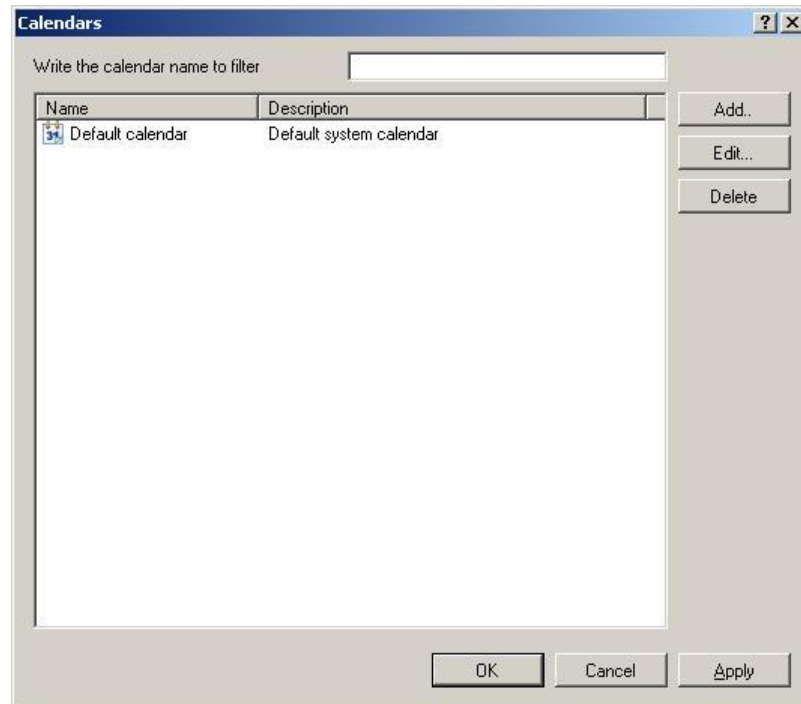


Figure 40 Calendar window

To add a calendar:

- Click on the “Add...” button. Q-flow will open a window like the one in Figure 41.
- Modify the calendar (there is an explanation in the “Calendar properties” section).
- Click on “OK”.

To modify a calendar, select it from the list and click on “Edit...”.

To eliminate a calendar, select it from the list and click on “Delete”.

Calendar properties

When a calendar is being edited or added, Q-flow opens a window like the one shown in Figure 41. This window allows you to define a calendar.

| Day | In | Out | In | Out |
|---|-------|-------|-------|-------|
| <input checked="" type="checkbox"/> Monday | 09:00 | 13:00 | 14:00 | 18:00 |
| <input checked="" type="checkbox"/> Thursday | 09:00 | 13:00 | 14:00 | 18:00 |
| <input checked="" type="checkbox"/> Wednesday | 09:00 | 13:00 | 14:00 | 18:00 |
| <input checked="" type="checkbox"/> Tuesday | 09:00 | 13:00 | 14:00 | 18:00 |
| <input checked="" type="checkbox"/> Friday | 09:00 | 13:00 | 14:00 | 18:00 |
| <input type="checkbox"/> Saturday | 09:00 | 13:00 | 14:00 | 18:00 |
| <input type="checkbox"/> Sunday | 09:00 | 13:00 | 14:00 | 18:00 |

Figure 41 Calendar definition

The calendar properties window has two tabs:

The first tab, "General", shows the following properties:

- **Name:** the calendar's descriptive name. It is the name that appears when a calendar must be chosen (for example, in a user's properties).
- **Description:** brief description of the calendar.
- **Labor days:** in this section of the screen you may mark the days of the week which are working days and define, for each day, the working hours ("In" and "Out" times). To set a day as a working day, check the checkbox that appears next to the name of the day.

The second tab, "Holidays" (Figure 42), allows you to specify holidays and other days of the year that are not working days.

To add a holiday:

- Click on the arrow that appears next to today's date. Q-flow will show a calendar from which a day of the year can be chosen.
- Choose a day.
- Click on "Add".



Figure 42 Vacation and holiday definition

Tools

The “Tools” menu presents some advanced options.

Connect to server

This option allows you to connect to a Q-flow server. When this option is selected, Q-flow displays a window like the one shown in Figure 43. The window shows the following options:

- **Server Name:** name of the server to which you wish to connect.
- **Connect Using:** connection method (.net Remoting, Web services or MSMQ). To choose the correct option, you should know what options are available for the selected server.
- **Sub Address:** the server’s sub address. This piece of information should also be known beforehand.
- **Login Information:**
 - **Use my network credentials:** uses the current user’s credentials.
 - **Use the following credentials:** allows you to specify a user name and a password that will be used to connect to the server.
- **Aautomatically connect to this server:** this option causes the tool to connect automatically the following times, using this configuration.

Once all the options have been configured, click on the button “Connect” in order to connect to the selected server.

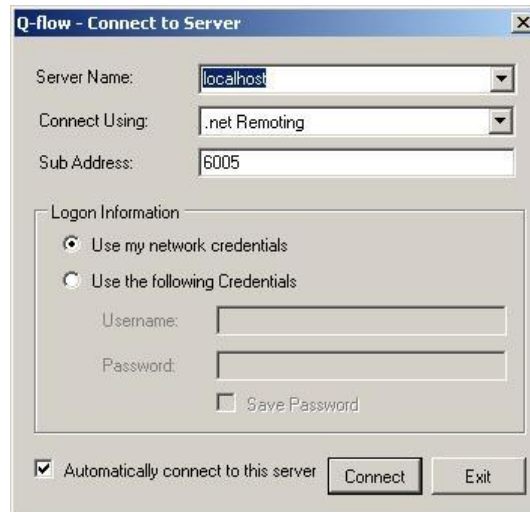


Figure 43 Connecto to server

Options

This option allows you to view the tool's general information and to configure its access by means of security roles. When you choose this option, Q-flow opens a window similar to the one shown in Figure 44.

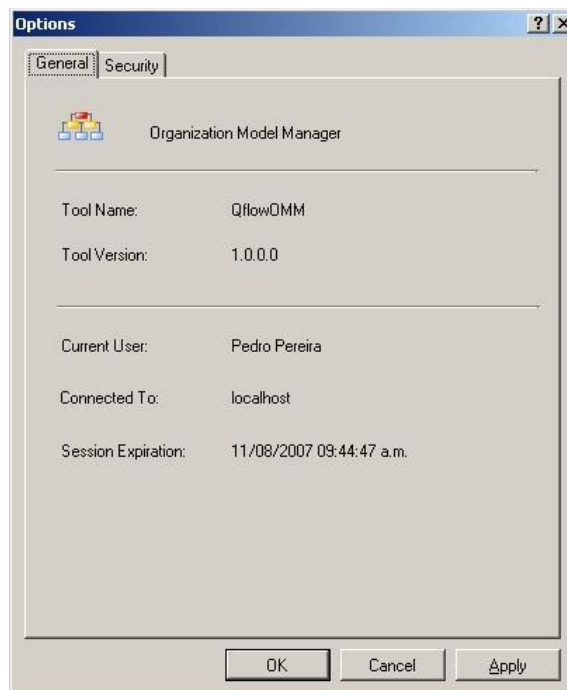


Figure 44 Options

The first tab of the window shows several pieces of information:

- **Tool Name**
- **Tool Version**
- **Current user:** the user who is using the tool.
- **Connected to:** name of the server to which the tool is connected.
- **Session Expiration:** date and time in which the current session expires.

The second tab (Figure 45) allows you to configure access permissions for the tool.

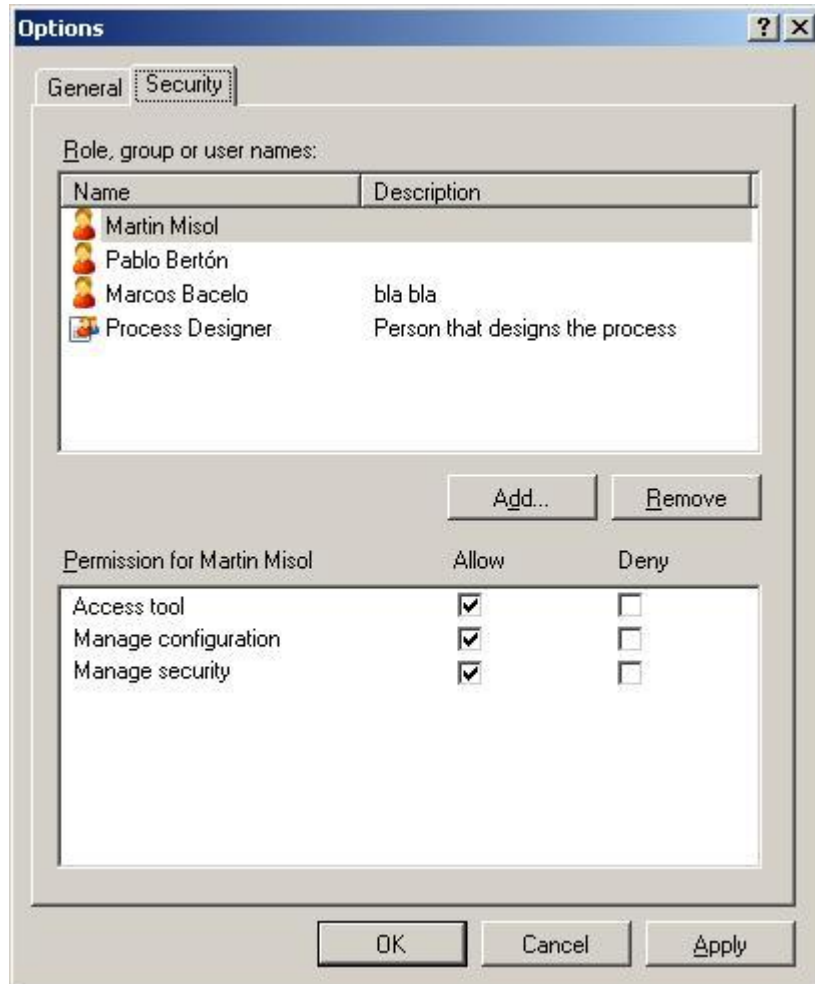


Figure 45 Security configuration

The upper part of the window (where it says “Role, group or user name”) shows the security roles, groups and users who have access to the tool. The “Add...” button allows you to add security roles, groups and users to the list. The button “Remove” allows you to remove the selected element.

The lower part of the screen shows the selected element’s permissions. These apply to three types of operations:

- **Access the tool:** allows the user to open the Organizational Model Manager, but changes cannot be made.
- **Administrative configuration:** allows the user to edit the options shown in the tool bar and which are not related to a node. For example, create a security role.
- **Administrative security:** allows the user to modify access permissions.

Extended properties

Sometimes, it may be desirable to handle properties that are not defined in Q-flow. For example, Q-flow does not have a “Phone number” property for a user. Extended properties exist to handle these cases.

Properties grid

An element’s extended properties are shown in the “Properties” tab of that element’s edit window. By default, this tab shows a grid with two columns: “Name” and “Value” (Figure 46). An asterisk (*) indicates a new row in which you may define a new property. To add a new property, write its name in the cell corresponding to the * row and the “Name” column, and its value in the cell corresponding to the * row and the “Value” column. Then, hit the “Enter” key. The illustration that appears in the right part of Figure 46 shows three properties.

There is another way of defining properties, which implies configuring Q-flow so that these are defined for all elements of a certain type (for example, for all users). In this case, the “Properties” tab, instead of showing a grid, will show a custom set of controls. The advantages of defining properties that way are that it is possible to specify the data type of each property (whether it is a text, a number or a date, for example), and that each property will be shown in a way fitting to that type, which prevents errors when values are assigned to it. For example, if a property has the “Yes/No” type, it will be shown in a control that allows only these values to be chosen.

To define extended properties this way you must modify the System.config file of Q-flow, as described in the installation and configuration manual.

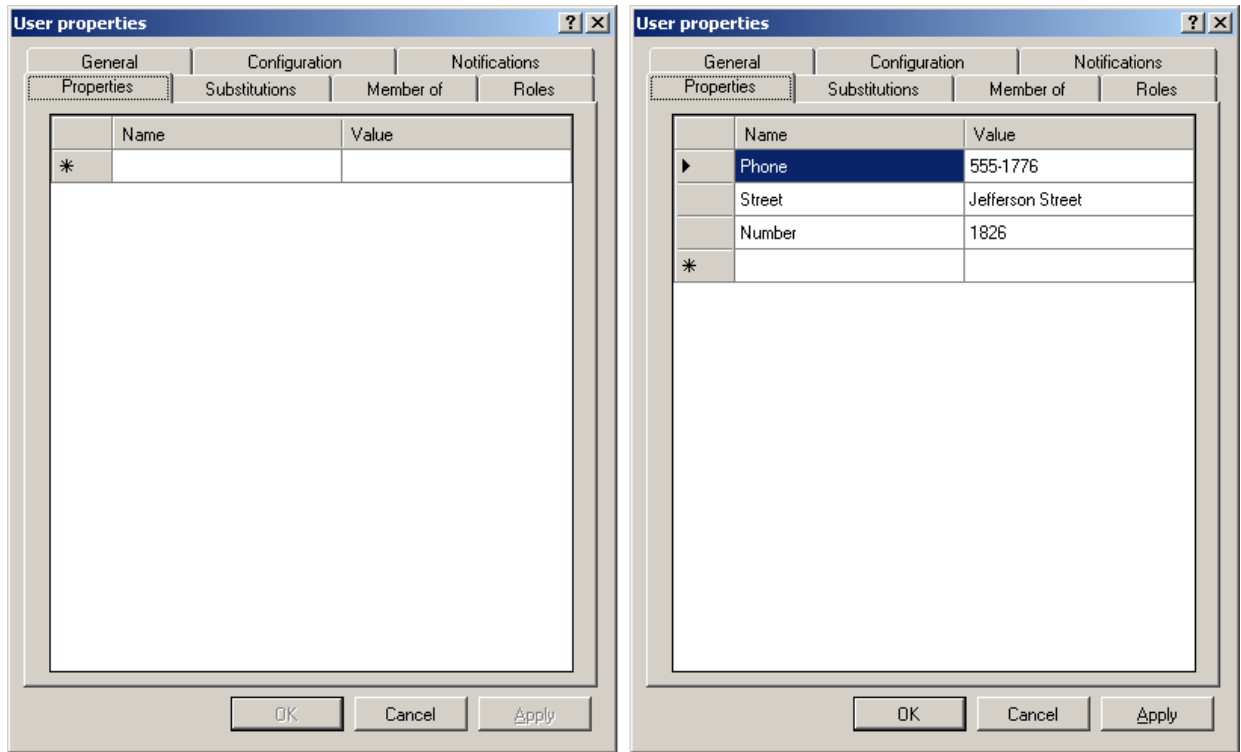


Figure 46 Extended properties

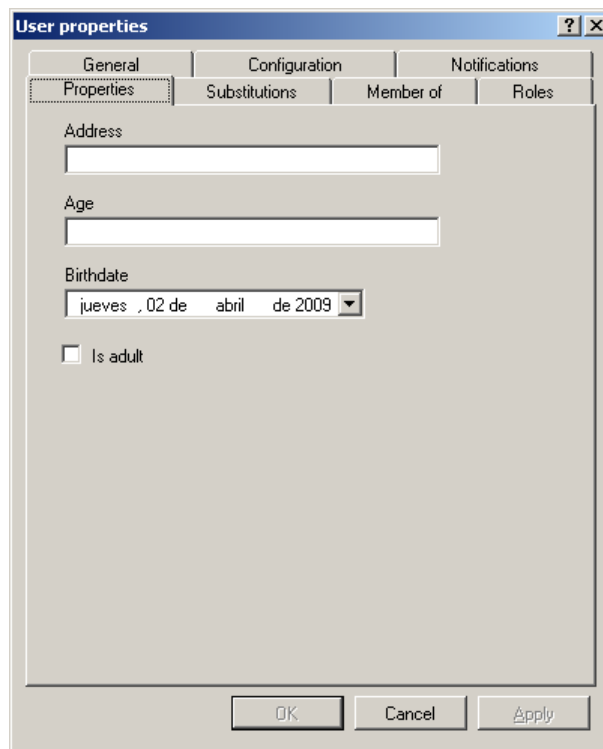


Figure 47 Extended properties defined through configuration