Course Exercises Guide

IBM Case Foundation 5.2.1: Security

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Unit 1. Security

Unit overview

Lessons

Requirements

The activities in this unit assume that you have access to the student system configured for these activities.

Lesson 1.1. Overview of workflow security

Overview

Why is this lesson important?

As a system administrator, you are responsible for workflow system security. You are setting up a workflow testing environment. You must configure security for this new environment.

Activities

- System Start, on page 1-4
- Isolated region preparation, on page 1-6
- Inspect security settings, on page 1-13

User accounts

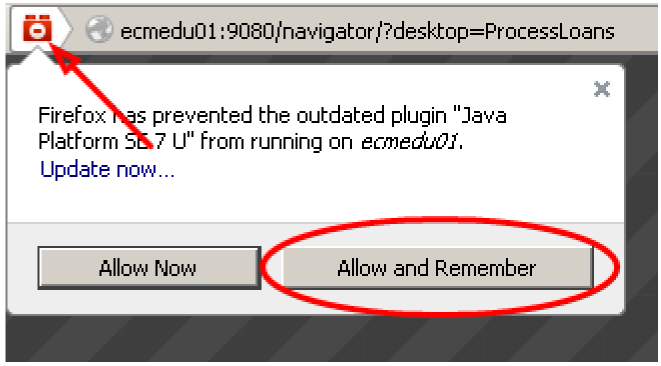
Type	User ID	Password
Operating system	administrator	passw0rd
Workflow system administrator	p8admin	IBMFileNetP8

Note

Passwords are always case-sensitive.

Troubleshooting

If you see a plug-in error message, click the red icon in the address bar and then select Allow and Remember.



System Start

Introduction

In this exercise, you start the system to prepare for later exercises.

Procedures

Procedure 1, "System start," on page 1-4

Procedure 2, "System Check," on page 1-4

Procedure 3, "Start WebSphere applications," on page 1-5

Procedure 1: System start

You must start your student system before you can continue with your lesson activities.

1. If necessary, log in to the operating system as Administrator (password: passw0rd)
2. Open the WebSphere Admin folder on your desktop.
3. Double-click Start Server1.bat
4. Wait for the command window to close.

Procedure 2: System Check

If your system is already running, you can check to ensure that the components are all started.

1. Open the Firefox browser on your desktop.
2. View the Ping pages that are in the System Health bookmarks folder.
   a. Click CE ping to verify that the Content Engine Startup Context (Ping Page) is displayed.
   b. Click PE ping to verify that the Process Engine Server Information (Ping Page) is displayed.
      - User name: `p8admin`
      - Password: `IBMFileNetP8`
   c. Click Navigator Ping page. Verify that the IBM Content Navigator Ping page interface is displayed.
3. Click the FileNet P8 System Health shortcut. Verify that the following components are online:
   - Global Configuration Database
   - Directory Configurations
   - PE Connection Points
   - PE Isolated Regions
   - Object Stores
   - Storage Areas
   - Sites

Note

The following components are not configured on this system:

- Fixed Content Devices
- Content Cache Areas

Procedure 3: Start WebSphere applications

If any of the components from the previous procedure are not functioning as described, use this procedure to confirm that WebSphere and the applications are running.

1. Click the WAS admin server 1 link in the browser bookmark list.
2. Log in as the p8admin user.
3. Make sure that the applications are all started.
   a. From the WebSphere Application Administration page, go to Applications > Application Types > WebSphere Enterprise Applications.
   b. Confirm that the following components are running:
      - FileNet Engine
      - IDSWebApp
      - SampleEDSService
      - Navigator

Note

WorkplaceXT is not used in this course, so it does not need to be started.

4. Start them if they are not started.
   a. Check the application that is not started.
   b. Click the Start button.
5. Log out of the WebSphere Application Server Administration page.

Isolated region preparation

Introduction

You are configuring an environment for testing a workflow application. You need to import the workflow application into the testing environment and then prepare the environment for security testing.

- Import an isolated region.
- Import the Process Loans desktop
- Transfer a workflow definition

Procedures

Procedure 1: Create a connection point

In this procedure, you create a connection point for the new isolated region 10. When you create the connection point, you also create the region.

1. Start Firefox if it is not already started.
2. Log on to Administration Console for Content Platform Engine as p8admin:
   a. Use the ACCE bookmark: `http://ecmedu01:9080/acce`
   b. User name: `p8admin`
   c. Password: `IBMFileNetP8`
3. Open the LoanProcess object store.
4. Go to Administrative > Workflow System > Connection Points.
5. Click New to create a connection point.
6. Complete the connection point wizard by using the following data.

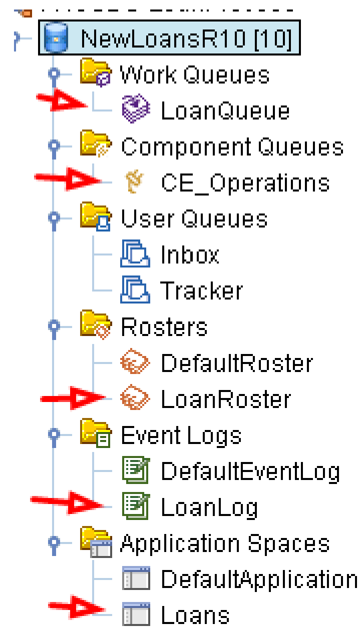
Page	Field	Value
Specify New Connection Point	Name	NewLoansR10
Specify New Isolated Region	Isolated Region Name	LoanProcessReg 10
	Isolated Region Number	10

Procedure 2: Import the process region

In this procedure, you import isolated region objects from an XML file.

1. Open Process Configuration Console:
   a. Right-click the Workflow System node.
   b. Click Configure Workflow Settings.
2. Connect to the NewLoansR10 region.
3. Import the region configuration:
   a. Right-click NewLoansR10.
   b. Click Import from XML file.
   c. Browse to the following location:
      C:\Labs\Case Foundation 5.2.1 Administration\Configure workflow system\Export.
   d. Select the NewLoansR10_export.xml
   e. Click Open.
   f. Click Import.
   g. Click Yes to proceed.
   h. Click Close.
4. Verify the import.
   a. Expand the nodes in NewLoansR10 region.
   b. Verify that the following region objects exist:
      - Work queues: LoanQueue
      - Component queues: CE_Operations
      - Rosters: LoanRoster
      - Event logs: LoanLog

- Application Spaces: Loans



5. Close Process Configuration Console.

Procedure 3: Import the IBM Content Navigator Desktop

In this procedure, you import the IBM Content Navigator desktop **Process Loans,** from a file.

1. Locate the ProcessLoans-export.properties file.

   a. Go to C:\Labs\Case Foundation 5.2.1 Administration\Workflow application deployment

   b. Extract all files in Deployment Application.zip to C:\Temp.

   c. Locate the file: C:\Temp\Deployment Application\Other IBM Assets\ProcessLoans-export.properties

   d. Leave this location open so that you can find the file later.

2. Open IBM Content Navigator administration tool.

   a. Open a Mozilla Firefox window.
   b. Go to Bookmarks > Content Navigator Administration.
   c. Log in with a Content Navigator administrator account.

      - User name: `P8Admin`

      - Password: `IBMFileNetP8`

3. The administration tool opens to the Desktops tab.

4. On the menu bar, click **Import**.

   a. Browse to the ProcessLoans-export.properties file.
   b. Ignore the warning and click **Import**, on the lower right. You might need to scroll down to see the Import button.
   c. The Desktop Import Summary is displayed.

      - You can choose to download the report if you want.

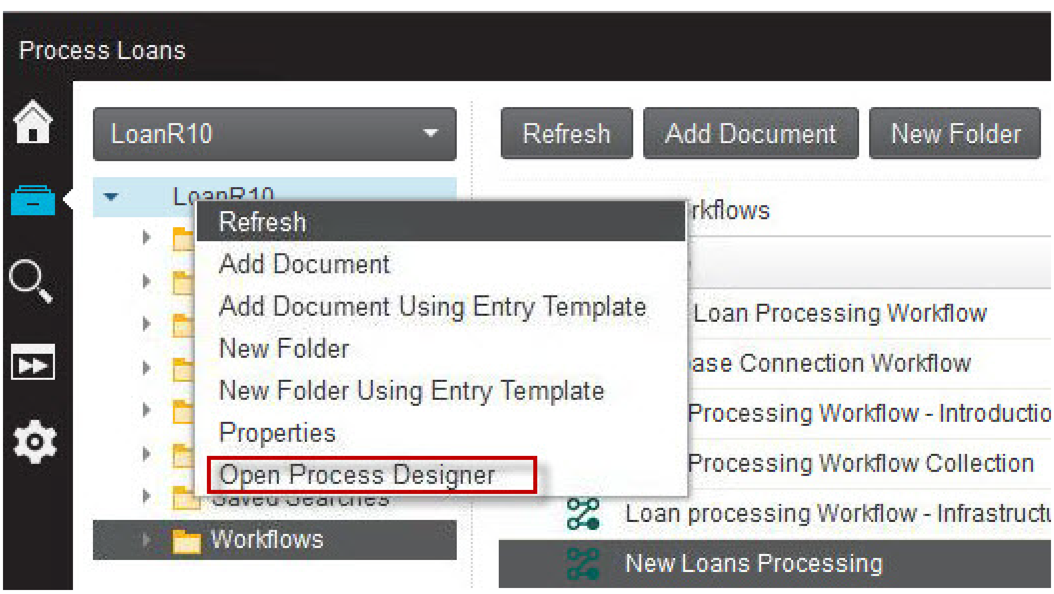
d. Click **Close**.

5. The desktop Process Loans is listed on the Desktops tab.
6. Open the Process Loans desktop node.
7. On the General tab, select the LoanProcess object store as the repository to use for Authentication.
8. Click Save and Close.
9. Log out of Content Navigator Administration.

Procedure 4: Transfer and launch the workflow

In this procedure, you transfer and launch a few instances of the New Loans Process workflow in the new isolated region in order to test the region configuration.

1. Use Firefox to open the Process Loans desktop.
   a. On the Mozilla Firefox browser window.
   b. Go to the URL: `http://ecmedu01:9080/navigator/?desktop=ProcessLoans`
   c. Create a bookmark this URL to make it easier to open in the future.
   d. Log in as the P8 administrator.
      - User name: `p8admin`
      - Password: `IBMFileNetP8`
2. Add the New Loans Processing workflow with the Process Designer.
   a. Right-click the second LoanR10, on the left, and select Open Process Designer.



   a. Click File > Open.
   b. Browse to:

`C:\Labs\Case Foundation 5.2.1 Administration\Configure workflow system\`

   c. Select New Loans Processing.pep.

3. Inspect the workflow definition.
    a. Click each step and review the step details. In particular, find the step participants.
    b. Confirm that the Verify Information step participant is F_Originator.
    c. Confirm that the Process Loan step participant is the LoanQueue work queue.

Information

This workflow definition is set up to send the work item first into the inbox of the user who created the workflow. When the first work item is complete, it goes to the LoanQueue work queue, so anyone who has access to that work queue can process it.

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4. Add roles to the F_Trackers queue:
    a. On the Workflow Properties tab, open the Workflow Groups tab.
    b. Click the Edit icon in the right lower right pane to add participants.
    c. In the Participant Selection window, select Groups.
    d. In the Search field, type `loan`, then click Search.
    e. Hold the Control key and select Loan Managers and Loan Processors.
    f. Use the arrow button to add them to the Selected groups.
    g. Click OK.
    h. Verify that the F_Trackers Workflow group includes P8Admin, Loan Managers, and Loan Processors.
5. Validate and transfer the New Loans Processing workflow.
    a. Select File > Validate Workflow Collection.
        - Make sure that you get a message that says the workflow validation is successful.
    b. Select File > Transfer Workflow Collection.
        - Save the workflow to the LoanProcess object store.
            - Browse to LoanProcess > Workflows, and then click Select.
            - Document Title: `New Loans Processing workflow`
            - Click Next.
            - Accept the default security.
            - Click Finish.
        - Close the successful transfer message.
6. Click File > Close, select Cancel the checkout.
7. Exit the Process Designer.
8. Launch a couple of instances of the workflow.
    a. Open the Workflows folder.

b. Select New Loans Processing workflow, click to the right of the name.
c. Click Actions > Workflow > Launch Workflow.

- customer_name: Mary Miller
- loan_amount: `250000`

d. Click Launch Workflow, lower right corner.
e. Launch another workflow with these data:

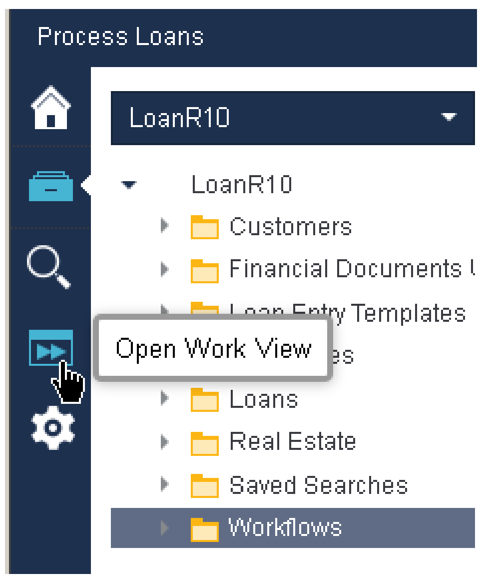
- customer_name: `Gregory Green`
- loan_amount: `200000`

9. Leave the desktop open for the next procedure.

Procedure 5: Process the workflow

When you launch a New Loan Processing workflow, the work item first goes to the inbox of the person who launches it. You are logged on to the Process Loans application as P8admin.

1. Open the work view.



2. Open Clerk > MyWork.
3. Double-click to open the work item for Mary Miller.
4. Click Complete.
5. Open Loan Processor > New Loans.
6. Open the work item.
7. Click Complete.
8. Click Loan Status under either role.
9. Verify that you can see the workflows that you launched. One of them is complete.

Information

The Loan Status in-basket corresponds to the Tracker queue.

10. Log out of Process Loans.

Inspect security settings

Introduction

In this exercise, you inspect the security settings of your imported workflow system.

Procedures

Procedure 1: Review object store security

In this procedure, you review the security configuration of the object store for your workflow system.

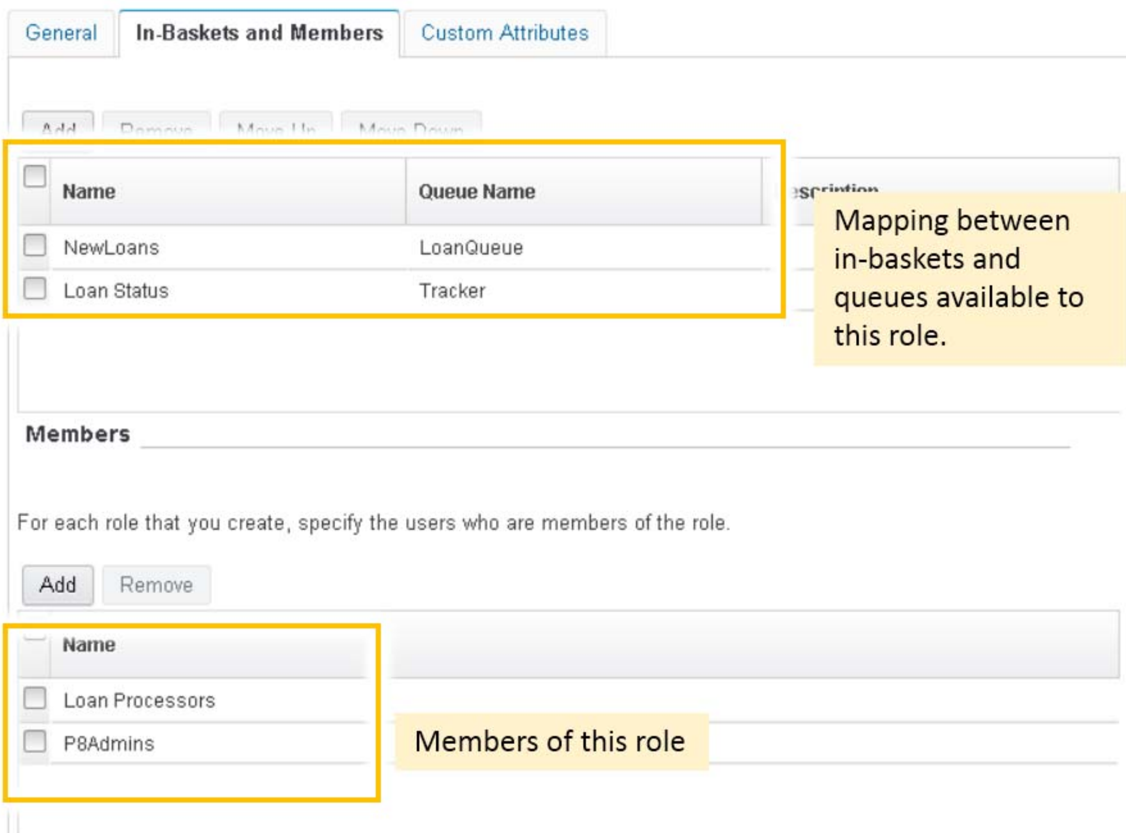
1. Start Firefox if it is not already started.
2. Log on to Administration Console for Content Platform Engine as p8admin:
   a. Use the ACCE bookmark: `http://ecmedu01:9080/acce`
   b. User name: `p8admin`
   c. Password: `IBMFileNetP8`
3. Open the LoanProcess object store.
4. Open the Security tab for the object store to review the object store access.

Name	Source	Permission Type	Permission Group
CEadmins	Direct	Allow	Full Control
Loan Business Analysts	Direct	Allow	Use object store
Loan Business Users	Direct	Allow	Use object store
Loan Guests	Direct	Allow	Use object store
Loan Managers	Direct	Allow	Use object store
Loan Officers	Direct	Allow	Use object store
Loan Operations	Direct	Allow	Use object store
Loan Processors	Direct	Allow	Use object store
Loan System Administrators	Direct	Allow	Use object store
Loan Underwriters	Direct	Allow	Use object store
P8Admins	Direct	Allow	Full Control

Procedure 2: Review the application space settings

In this procedure, you review the application space settings, including the roles and in-baskets that are assigned to those roles. Within a desktop environment only a user who is a member of a role can view the associated in-baskets. You are logged on to Administration Console as p8admin. You are viewing the LoanProcess object store.

1. Expand Administrative > Workflow System > Isolated Regions > LoanProcessingReg10 > Application Spaces.
2. Click the Loans application space.
3. Open the Roles tab.
4. Confirm that two roles are defined: Clerk and Loan Processor.
5. Inspect the Loan Processor role:
   a. Open the Loan Processor role.
   b. Open the In-baskets and Members tab
   c. Review the in-basket and queue mapping.
   d. Review the members list..



   e. Click Cancel to close the Edit Role window.
6. Inspect the Clerk role:
   a. Open the Clerk role.
   b. Open the In-baskets and Members tab.
   c. Review the in-basket and queue mapping.
   d. Review the members list.

e. Click Cancel to close the Edit Role window.

f. Leave Administration Console open.

Procedure 3: Inspect Queue and Roster security

In this procedure, you inspect the security settings on the user queues, work queues, and rosters. You are logged on to Administration Console as p8admin. You are viewing the LoanProcess object store.

1. Inspect LoanRoster security:
   a. Expand LoanProcessingReg10 > Rosters.
   b. Open LoanRoster.
   c. Open the Security tab of LoanRoster.
   d. Verify that no users are specified.
2. Inspect Inbox security:
   a. Expand User Queues.
   b. Open the Inbox queue.
   c. Open the Security tab of Inbox.
   d. Verify that no users are specified.
3. Inspect Tracker security:
   a. Open the Tracker queue.
   b. Open the Security tab of Tracker.
   c. Verify that no users are specified.
4. Log out of Administration Console.
5. Close Firefox.

Lesson 1.2. Configure workflow system security

Overview

Why is this lesson important?

You are configuring a workflow system to use as a testing environment for a workflow application. You must configure security for the new test system.

Activities

- Checkpoint: Summarize the security findings, on page 1-17
- Add groups to the workflow system, on page 1-19

User accounts

Type	User ID	Password
Workflow system administrator	p8admin	IBMFileNetP8
Windows logon	Administrator	passw0rd
Loan Processor	pat	filenet
Loan Officer	olivia	filenet
Loan Guest	gabe	filenet

Note

Passwords are always case-sensitive. User names are not case-sensitive. Many user names on the student system use only lowercase letters.

Checkpoint: Summarize the security findings

You inspected the security settings for the object store, user queues, work queues, roster. You also inspected the application space. The results are shown in the following table. Use the information that is provided to answer security-related questions.

Object	User information	Notes
Object store	CEAdmins	Full control. Workflow system administrator group, Workflow configuration group. P8admin is a member.
	Loan Business Analysts Loan business users Loan Guests Loan Managers Loan Officers Loan Operations Loan Processors Loan System Administrators Loan Underwriters	Use object store.
	P8Admins	P8admin is a member.
Loan Processor role	Loan Processors P8Admin	NewLoans in-basket- LoanQueue LoanStatus in-basket - Tracker
Clerk role	olivia P8Admin	Olivia is in the Loan Officer group. MyWork - Inbox LoanStatus - Tracker
Inbox	No security defined.	User queue
LoanQueue	No security defined	Work queue
LoanRoster	No security defined	Roster

Questions

Select the best answer for each question. Answers are provided in Appendix A, "Review answers," on page A-1.

1. Who, besides P8Admin, can see work in LoanQueue?
    a. No one
    b. Loan Guests
    c. Clerks
    d. Loan Processors
2. Who, besides P8Admin, can track work items?
    a. No one
    b. Loan Guests
    c. Clerks
    d. Loan Processors
3. Who, besides P8admin, can launch a workflow?
    a. Any authenticated user
    b. Loan Guests
    c. Clerks
    d. Loan Processors
4. If you sign in as a Loan Processor, which **queues** would you be able to see?
    a. NewLoans, MyWork
    b. MyWork, LoanStatus
    c. LoanQueue, Tracker
    d. None.
5. If you sign in as Olivia, which in-baskets would you be able to see?
    a. NewLoans, MyWork
    b. MyWork, LoanStatus
    c. LoanQueue, Tracker,
    d. None.

Add groups to the workflow system

Introduction

In this exercise, you configure security on the workflow system to allow specific groups to have limited access to work.

Scenario

You need to add two groups to the workflow system. Currently, both groups have object store access, but neither group has access to any work items.

The following conditions must be met:

- Loan Underwriters must be able to create and process workflows.
- Loan Managers must be able to process and track work.
- Loan Guests must have no access.

User accounts

Type	User ID	Password
Workflow system administrator	p8admin	IBMFileNetP8
Windows logon	Administrator	passw0rd
Loan Processor	pat	filenet
Loan Officer	olivia	filenet
Loan Guest	gabe	filenet
Loan Underwriter	uma	filenet

Verification

You must log on as a user from each group to verify that the correct security settings are applied.

Procedures

Procedure 1: Security check

In this procedure, you log on to the Process Loans application to see the current security for each group.

1. Review Loan Underwriter access:
    a. Using Firefox, log on to the Process Loans application as a Loan Underwriter.
        - User name: `uma`
        - Password: `filenet`
    b. Open the Work View.
    c. Note the in-baskets that you can see or work with.
    d. Log out of Process Loans.
2. Use the same steps to review Loan Manager access.
    - User name: `Mary`
    - Password: `filenet`
3. Use the same steps to review Loan Guest access.
    - User name: `Gabe`
    - Password: `filenet`
4. As Gabe, launch a workflow.
    a. Open the Browse view.
    b. Open the Workflows folder.
    c. Launch the New Loan Processing workflow.
    d. Enter any values that you want. The purpose of the test is to determine whether you can launch a workflow.
5. Log out of the Process Loans application.

Note

Recall that the first step in the workflow goes to the workflow initiator. Although Gabe can launch workflows, Gabe has no access to the inbox. The workflow cannot be further processed.

Procedure 2: Configure work queue security

In this exercise, you configure security on the LoanQueue work queue. If no one is assigned to the queue, access is granted to anyone with object store access. You must add Loan Underwriters to the queue. However, you must also add Loan Processors and Loan Managers.

1. Start Firefox if it is not already started.
2. Log on to Administration Console for Content Platform Engine as p8admin:
    a. Use the ACCE bookmark: `http://ecmedu01:9080/acce`

   b. User name: p8admin

   c. Password: IBMFileNetP8

3. Open the LoanProcess object store.
4. Expand Administration > Workflow System > Isolated Regions > LoanProcessingReg10 > Work Queues.
5. Click LoanQueue.
6. Open the In-baskets tab.
7. Confirm that NewLoans in-basket belongs to LoanQueue.

Information

This tab is where you configure in-baskets for the queues.

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8. Open the Security tab.
9. Add workers to LoanQueue:

   a. Click Add.

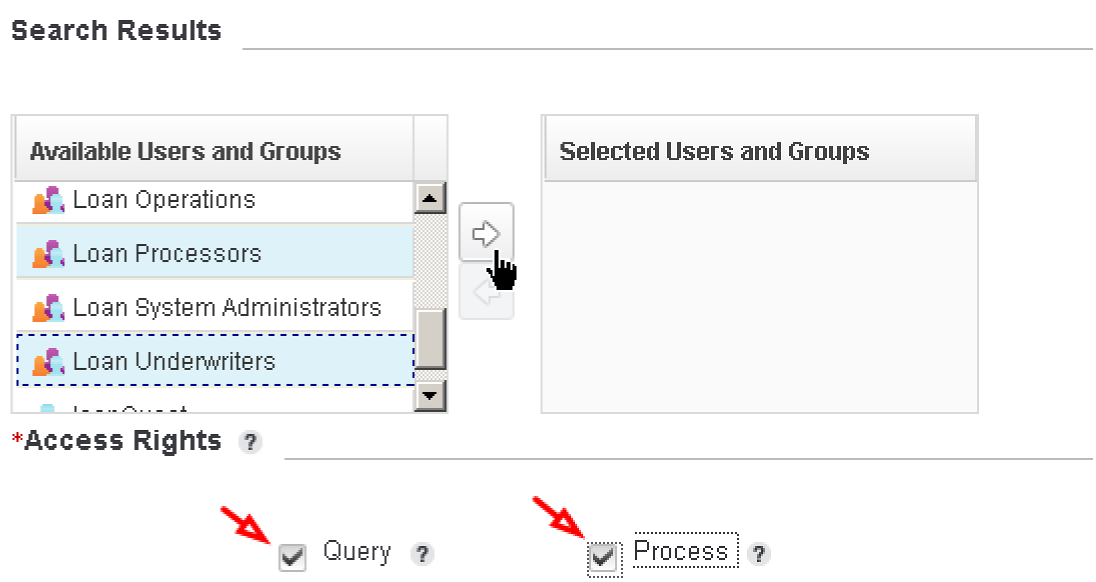
   b. Type loan in the search field and then click Search.

   c. Select Loan Processors and Loan Underwriters.

   d. Click the arrow to move the group into the Selected Users and Groups field.

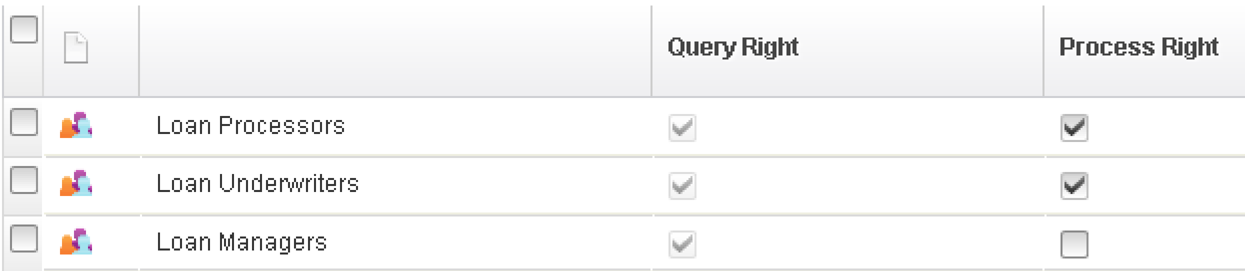
   e. Check the Query and Process options.

   f. Click OK.



g. On the LoanQueue page, click Save to save your changes.

10. Add Loan Managers to the LoanQueue with Query access only.
    a. Click Add.
    b. Find Loan Managers group.
    c. Check only the Query option and leave the Process option clear.
11. Verify your settings:



12. Click Save.

Procedure 3: Configure user queue security

You must provide Loan Managers, Loan Processors, and Loan Underwriters permissions to view and process personal work items. You must also provide Loan Managers with access to the Tracker queue, so that they can track work. You are logged on to Administration Console as P8admin. You are viewing the LoanProcess object store.

1. Expand User Queues.
2. Select Inbox.
3. Open the In-baskets tab.
4. Confirm that the MyWork in-basket belongs to the Inbox user queue.
5. Open the Security tab.
6. Use the data table to configure security on the Inbox user queue.

Group	Permissions
Loan Managers	Query, Process
Loan Processors	Query, Process
Loan Underwriters	Query, Process

7. Save your changes to the Inbox queue.
8. Select Tracker.
9. Confirm that the Loan Status in-basket is associated with the Tracker queue.

10. Use the data table to configure security on the Tracker user queue.

Group	Permissions
Loan Managers	Query, Process

11. Save your changes to the Tracker queue.

Procedure 4: Configure Roster security

Users must be able to create objects in the roster to launch workflows. A user who can create a workflow does not always need to process the workflow after it is created.

1. Expand Rosters.
2. Select LoanRoster.
3. Use the data table to configure.

Group	Permissions
Loan Managers	Query
Loan Processors	Query, Create
Loan Underwriters	Query, Create

4. Save your changes to LoanRoster.

Procedure 5: Manage the Loan Processor role

In this procedure, you must manage the roles and in-baskets from the application space.

1. Expand the Application Spaces folder.
2. Open the Loans application space.
3. Open the Roles tab.
4. Click Loan Processor.
5. Open the In-Baskets and Members tab.
6. Add Loan Managers to this role.
7. In the In-Baskets area, add the MyWork in-basket to this role.
8. Save your changes.

Procedure 6: Add a Loan Underwriter role

In this procedure, you add a role for Loan Underwriters.

1. Click New.
2. In the New Role window, enter the following information.

Tab	Field	Value
General	Name	Loan Underwriters
In-Baskets and Members	In-baskets	NewLoans MyWork
	Members	Loan Underwriters

3. Save your changes to the Loans application space.

Procedure 7: Retransfer the workflow

Roster create permissions do not take effect until after a new version of the workflow definition is transferred.

1. Use Firefox to open the Process Loans desktop.
   a. On the Mozilla Firefox browser window.
   b. Go to the URL: `http://ecmedu01:9080/navigator/?desktop=ProcessLoans`
   c. Log in as the P8 administrator.
      - User name: `p8admin`
      - Password: `IBMFileNetP8`
2. Open the New Loans Processing workflow in Process Designer.
3. Click File > FileNet > FileNet Checkin.
4. Click Finish.

Information

You must check in a new version of the workflow before you can transfer it.

5. Transfer the New Loans Processing workflow.
   a. Select File > Transfer Workflow Collection.
   b. Click OK to use the existing workflow name.
   c. Click Finish to accept all defaults and complete the transfer process.
   d. Click Close to close the successful transfer message.

6. Close Process Designer.
    a. Click File > Exit.
    b. Select Cancel Checkout.
    c. Click OK.

Procedure 8: Test security

User	Group	Password	Roles	In-baskets	Launch?
Pat	Loan Processors	filenet	Loan Processor	NewLoans Loan Status MyWork	Yes
uma	Loan Underwriters	filenet	Loan Underwriter	NewLoans MyWork	Yes
Mary	Loan Managers	filenet	Loan Processor	New Loans Loan Status MyWork	No
Gabe	Loan Guests	filenet	none	none	No

1. Log in to the Process Loans application as each user (see the table).
2. From the Work View, confirm that the user can see the correct in-baskets.
3. From the Browse View, launch the New Loan Processing workflow.
4. Compare your results with the table.

Appendix A. Review answers

Questions

Select the best answer for each question.

1. Who, besides P8Admin, can see work in LoanQueue?
    a. No one
    b. Loan Guests
    c. Clerks
    d. Loan Processors

    Answer: d (Only Loan Processors are given access to that queue.)
2. Who, besides P8Admin, can track work items?
    a. No one
    b. Loan Guests
    c. Clerks
    d. Loan Processors

    Answer: d (Loan Processors are given access to Loan Status queue.)
3. Who, besides P8admin, can launch a workflow?
    a. Anyone
    b. Loan Guests
    c. Clerks
    d. Loan Processors

    Answer: a (LoanRoster is unrestricted.)
4. If you sign in as a Loan Processor, which **queues** would you be able to see?
    a. NewLoans, MyWork
    b. MyWork, LoanStatus
    c. LoanQueue, Tracker
    d. None.

    Answer: c (NewLoans and MyWork are in-baskets, not queues.)

5. If you sign in as Olivia, which in-baskets would you be able to see?
   a. NewLoans, Mywork
   b. MyWork, LoanStatus
   c. LoanQueue, Tracker,
   d. None.

   Answer: b (Olivia is individually allowed to view these queues.)

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