Managing Processes

Description of process editor functions and tools for managing process definitions.

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Process Editor Function Legend

The following table provides a description of each function used in the Process Palette. The Process Palette is available for in the *Processes* (Common) section (i.e., Processes folder), or in the *Services > Operations > Process* or *Services > Operations > Fault* section.

- To use an Activity, drag and drop it to the Process Palette and double-click the activity icon to launch the Activity Editor.
- A default name is assigned to the Activity. If you would like to assign a custom name, right-click on the activity icon and select Edit Activity Name.
- To use the Process Management Tools, click the icon to launch or execute the action.

Function	Definition
	Default Process When service is virtualized a default process is added to each service operation. It is composed of a Receive Activity (which cannot be deleted), an Invoke Activity, and a Reply Activity.
	Edit / Delete Activity Right-click on an Activity icon to launch the activities editor, update the activity name, or delete the activity.
	Receive Activity Icon Part of the default process. *Note: This Activity type cannot be deleted.*
	Audit Activity Icon Launches the Auditing Details Editor.
	Branch Activity Icon Launches the Branch Details Editor.

Function	Definition
	Insert Content Activity Icon Launches the Insert Content Details Editor.
	Invoke Activity Icon Launches the Invocation Details Editor
	Process Activity Icon Launches the Process Selection Editor
	Reply Activity Icon Launches the Reply Details Editor
	Script Activity Icon Launches the Script Details Editor
	Transformation Activity Icon Launches the Transformation Details Editor.
	Add / View Activity Variables Launches Variable Details Editor.
	Save Process to Database Saves the current process to the database. Your process is saved ONLY when you receive a confirmation message indicating that it has been successfully saved. *Note that the process must comply with activity-specific input and output criteria before it can be saved.*
	Delete Selected Object Deletes the selected objects (i.e., activity icons, connection arrows, etc.) from the Process Palette.
	Download Stored Process in XML Format Allows you to save or open the process version that is currently stored to the database in XML format. You can perform the following actions. • Save - Save, Save As, Save and Open. • Open - Loads XML file into your a CSS editor. • Cancel - Exits the operation.

Function	Definition
	Reload Process from Database Reloads the last process that was saved to the database. Note that updates to the current process that have not been saved to the database will be lost.
	Process Help Icon Launches the Policy Manager Online Help.

Processes Management Functions (Common)

The following process management functions apply to to the common process definitions in the Processes folder. They are available on the *Process Summary* drop-down menu or via the Actions Portlet on the *Process > Details* page.

Add Process

Used to add a process instance. A default process instance includes a Receive and Reply activity.

Select **Add Process** on the main *Process Summary* page and assign a name and description. The Add Process Wizard creates a process instance that you can configure using the Process palatte (i.e., Process tab).

Modify Process Information

Allows you to change the name and description of a process.

Change Organization

Allows you to move the current process configuration to a new "Organization."

- Note that processes referenced in process definitions via the Process Activity, can only be moved within the current Process Scope (i.e., Organization, Service, Operation).
- If you wish to move a process to a different "Organization" the references must stay in scope.
- To determine what references a process might have, select "View Process References" for the current process.
- To remove process references, remove the Process Activity that contains the reference from the process definition.

Copy Process

Allows you to replicate a process definition and assign a new "Process Name" and "Process Key." Using this function you can configure elements that represent core functionality of a process, replicate them to a new process, and then perform additional customization on the copy.

Delete Process

Deletes the selected process definition. In order to delete a process, it cannot be "Referenced" (i.e., used in one or more Process Activity definitions). The number of process references are indicated in the "#" column and can be viewed by selecting the "View Process References."

If you would like to delete a process, you must delete Process Activity in your process definition that includes the reference and save the process using the "Save Process to Database" function on the Process Palette Toolbar.

Export Process

Provides a method of exporting a process definition to a "Package" file. This "Package" file can then be imported into a different Policy Manager deployment using the "Import Package" function.

Get Process Content

Allows you to save or open the process version that is currently stored to the database in XML format. You can perform the following actions.

- Save - Save, Save As, Save and Open.
- Open - Loads XML file into your a CSS editor.
- Cancel - Exits the operation.

View Process References

Displays a list of service operations that the current process is referencing in a Process Activity.