

Business Rule Maintenance Web Application

Documentation

Version 0.1

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Overview

The Business Rules Maintenance web application allows to create, update and delete projects, rulegroups, subgroup, rules and actions. These are used to define a logic with the purpose to execute that logic (rules) against a set of data.

The web application exports a project to a zip file which can directly be executed with JaRE – the Java Rule Engine.

The ruleengine JaRE is written in Java and can run either standalone from the command line or may be embedded in other Java related projects. It may be embedded in other tools or web applications.

The main goal of using a business rules and ruleengine approach is to separate the IT logic from the business logic. This way both types of logic can be managed individually and by the relevant domain experts: IT expert or business expert. This creates a proper division of responsibilities, makes IT code cleaner and easier to maintain and thus adds to the overall quality and agility of the system.

By separating IT and business logic, the business user is not confronted with business rules being mixed with complex IT code or work flows. This enhances the transparency for the user.

This document explains the installation, configuration, concepts and usage of the web application.

Prerequisites

To use the web application following prerequisites have to be met:

- Java: The Business Rules maintenance web application is written in Java. It comes in the form of a .war file (web archive).
- Tomcat: Tomcat allows to run Java code on the server side. Any other tool with the same capabilities and allowing to use .war files may also be used.
- MySQL/MariaDB: The web application stores configuration and all data entered by the user in a MySQL database. Other dialects of MySQL such as MariaDB may also be used.
- A moderately modern web browser. Parts of the application use Javascript to enhance the user experience.

It is assumed that the user – before running the Business Rules Maintenance web

application - has a running version of Java, Tomcat and MySQL already in place.

The web application uses the JaRE Java library. In case you want to use/install a newer version of this library see the section "Software Updates".

Installation

1. MySQL/MariaDB: database setup

The first step is to download the schema of the database. The schema contains the definitions of the required database tables and some base configuration data.

Import the database schema into the running MySQL/MariaDB instance by issuing following command on the command line:

```
mysql -u [user] -p < ruleengine_rules.sql
```

Replace "[user]" in the command with an existing user that has sufficient rights to import the database schema and create the database, tables, indexes and data.

If your MySQL/MariaDB server does not require a username and password then leave out the appropriate parameters in the command.

2. Apache Tomcat: install the web application

Download the Business Rules Maintenance web application .war file.

Locate where in your system Apache Tomcat is installed. It contains a folder labeled "*webapps*". Copy the .war file into the "*webapps*" folder. Usually Tomcat automatically expands the war file (installs it) and the web application is immediately available. If this is not the case you might have to restart Tomcat.

Open a webbrowser window and enter following URL (address):

```
http://localhost:[port]/rule_maintenance/
```

If Tomcat is running on a different server (not localhost), replace "*localhost*" with the server ip address or the hostname for that server. Tomcat usually runs on port 8080. If unsure, check with your Tomcat configuration, which port is used.

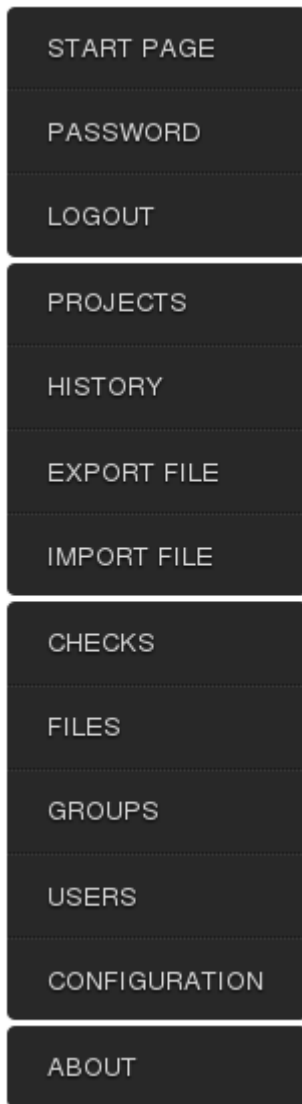
You should now see a page of the Business Rule Maintenance web application. On first startup you may be presented with a configuration page. Enter the details for the database configuration: the host of the MySQL/MariaDB server and the port, the name of the database (the default is: "*ruleengine_rules*"), the user to access the database and the user password. Finally click on "*save*" to save the configuration.

Next you will be presented with the login page. If not, click on "*Login*" in the menu on the left-hand side. Now enter the userid and password for the web application. The default userid is *admin* and the password is also *admin*.

Menu

The menu is located on the left side of the web application and is always visible. It allows the user to navigate through the application.

Below is a short description of the individual menu items.



*Screenshot 1:
Application Menu*

Start Page

The Start Page is the first page a user is directed to after starting the web application or logging into the application. It shows a basic introduction to the purpose of the application.

Password

Allows to change the password of the user. The user has to provide the current password and then twice a new password.

If the application is configured to use LDAP, then a change of the password from within the application is not possible.

Login/Logout

The web application requires users to enter a userid and password to authenticate. On login it is determined to which group(s) the user is assigned. The user settings steer to which project users have access or which project they see.

Projects

Projects is the central place to work with projects, to create, update or delete rulegroups, subgroups, rules and actions.

Project is the highest hierarchy. A project may contain zero, one or multiple rulegroups. Rulegroups may contain zero, one or multiple subgroups. Rulegroups also may contain zero, one or multiple actions. Subgroups contain zero, one or multiple rules.

History

When working with the web application, certain actions of a user are captured. The history allows the user to quickly access these captured actions and so the history acts as a shortcut to allow quicker navigation.

Export File

Allows to export a project. The file created is a regular zip file and contains all rulegroups, subgroups, rules and actions for a given project. The resulting zip file can be used directly with the ruleengine to execute the rules.

Import File

Allows to import a project that previously has been exported. The user has to specify the name and description and the owner group of the imported project.

Checks

Visible only for users in the *Admin* group. Rules use predefined checks to achieve their task. One rule uses exactly one check at a time. By combining rules with different checks a complex logic can be built.

An example for a check is „is equal to“, „is greater than“ or „is not null“.

Currently there are 40 different checks available.

Files

Visible only for users in the *Admin* group. The web application uses Beanshell scripts and Apache Velocity templates to separate the programming logic of the web application from its representation on the screen. In the Files section a user with administrative rights can change the web application code or display on the fly.

Groups

Visible only for users in the *Admin* group. Groups define a collection of users that have the same access rights to projects. Different groups can contain different users and these can access different projects.

Users

Visible only for users in the *Admin* group. A user can be assigned to one or multiple groups.

Configuration

Visible only for users in the *Admin* group. The configuration defines the details of the connection of the web application to the database and optional LDAP settings.

About

The about page shows information about the web application version and other details.

Concepts

This section explains the concepts that build the base for this web application. It is also related to the concept of the ruleengine that is used when the rules are executed against a set of data.

Group Management

The web application allows to define and modify groups. Users can be assigned to one or more groups. The settings for a project allow the definition to which group the project belongs. All users that are assigned to this group may read and update all details of the project, rulegroups, subgroups, rules and actions. Users not being part of the group have a read-only access to all the mentioned parts.

The group „Admin“ can not be updated or deleted, as it is required by the system. Users that are assigned to this group have admin privileges for the web application.

User Management

The web application allows to define and update users. Users can be assigned to one or multiple groups. See „*Group Management*“ for more details.

Project Management

Projects are containers for rulegroups, subgroups, rules and actions. They group all parts together. When a project is created it has to be assigned to a group. Users assigned to this group have read and write access to all parts of the project. Other users have read-only access to all parts of the project.

If a project is marked as private project, only users assigned to the owner group the project belongs to have access to the project. Other users don't see the project.

Checks

Configuration

The configuration page allows to define the basic settings for the application. An administrator may update the settings for accessing the database and the LDAP settings.

Import Project

A project – in the form of a zip file - that has previously been exported using this web application can be imported. This allows the exchange of project files and definitions

between different users or across different companies.

If a project is exported to a file, it can be safely deleted and then re-created by importing the project file. There is no data loss in this process.

Export Project

A project may be exported. In the process a zip file is created that can directly (without modifications) be run with the JaRE ruleengine.

When exporting, the user has to select the project and enter a validity date for which he/she wants to do the export. The validity date steers which rulegroups are exported. Rulegroups have a start and end validity. Only those rulegroups are exported which are valid for the specified validity export date.

History

Projects can contain a certain number of rulegroups, subgroups, rules and actions. This makes it time consuming to locate a certain component. The History lists components that lately have been looked at or updated by the user that is logged in. The user won't see the history of the other users.

User Avatar

The user may choose a picture for his/her representation. It is shown on the upper right-hand side of the web application. Clicking on the picture – or the default picture if undefined – will allow the user to upload a picture to be used as the user's avatar.

Help

In various places/screens of the web application, there is help available identified by a little icon with a question mark inside:



Click on the icon to display a short help text. Click on it again to hide the help text.

Projects

Rulegroups

validity

Subgroups

Rules

Actions

Pentaho PDI

The web application can produce/export a project and all relevant settings and data to a single zip file. This file can be used with the JaRE ruleengine. Note that it is not required to use any Pentaho software to do so.

But there is a certain integration of the ruleengine with the ETL tool from Pentaho. This tool is called Pentaho PDI or also Pentaho Kettle (previous/old name). There are plugins available for Pentaho PDI which make it very easy to use and interact with the ruleengine. This helps the ETL developer and designer to separate his code from business rules and allows for cleaner design and code.

The ruleengine plugins for Pentaho PDI are available through the Pentaho marketplace. They can easily be installed through the interface of the ETL tool.

Workflow

Software Updates

The Business Rules Maintenance web application uses several software libraries. If a newer version of these libraries is available it might be possible to replace the existing ones. This depends on the compatibility of the newer libraries with this web application code.

The libraries are located in following folder:

[Tomcat root folder]/webapps/rule_maintenance/WEB-INF/lib

Updates to the base components of Java, Apache Tomcat and MySQL/MariaDB should in general be possible without interference to the web application.

Contact

For questions or feedback please contact me.

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- Twitter: @uweeegeeee

Links

Below is a list of links to software or web pages references in this document.

- MySQL/MariaDB database schema:

Link: https://github.com/uwegeercken/rule_maintenance_db

Download file: ruleengine_rules.sql

- Business Rules Maintenance web application .war file

Link: https://github.com/uwegeercken/rule_maintenance_war

Download file: rule_maintenance.war

Defaults

Listed below are defaults that the web application uses.

- Business Rules Maintenance application default login
userid: *admin*
password: *admin*
- Database name: *ruleengine_rules*

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