

TIBCO ActiveMatrix BusinessWorks™ Plug-in for SmartMapper Business UI User's Guide

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TIBCO Documentation and Services

Documentation for this and other TIBCO products is available on the TIBCO Documentation site. This site is updated more frequently than any documentation that might be included with the product. To ensure that you are accessing the latest available help topics, please visit:

<https://docs.tibco.com>

Product-Specific Documentation

Documentation for TIBCO products is not bundled with the software. Instead, it is available on the TIBCO Documentation site at <https://docs.tibco.com/products/tibco-activematrix-businessworks-smartmapper-plugin>. To directly access documentation for this product, double-click the following file:

`TIBCO_HOME/release_notes/TIB_adsmartmapper_version_docinfo.html`

where `TIBCO_HOME` is the top-level directory in which TIBCO products are installed. On Windows, the default `TIBCO_HOME` is `C:\Program Files\tibco\bw6`. On UNIX systems, the default `TIBCO_HOME` is `/opt/tibco`.

The following documents for this product can be found in the TIBCO Documentation Library:

- *TIBCO ActiveMatrix BusinessWorks Plug-in for SmartMapper Installation*
- *TIBCO ActiveMatrix BusinessWorks Plug-in for SmartMapper User's Guide*
- *TIBCO ActiveMatrix BusinessWorks Plug-in for SmartMapper BUI User's Guide*
- *TIBCO ActiveMatrix BusinessWorks Plug-in for SmartMapper Release Notes*

The following documents provide additional information and can be found in the TIBCO Documentation Library:

- *TIBCO ActiveMatrix BusinessWorks Documentation*
- *TIBCO Enterprise Administrator User's Guide*

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- For an overview of TIBCO Support, and information about getting started with TIBCO Support, visit this site:

<http://www.tibco.com/services/support>

- If you already have a valid maintenance or support contract, visit this site:

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Entry to this site requires a user name and password. If you do not have a user name, you can request one.

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<https://community.tibco.com>

Introduction

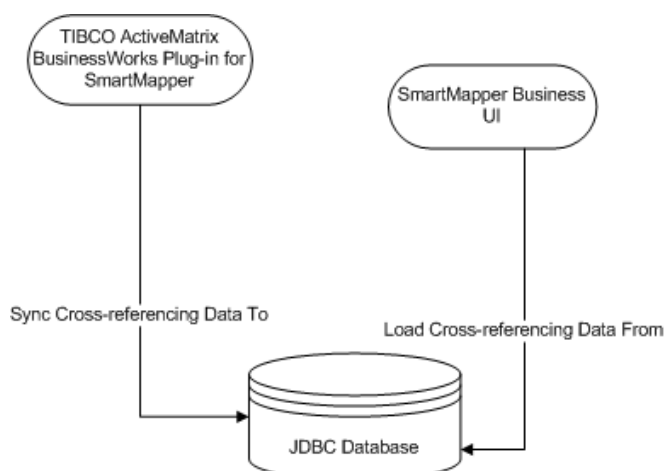
With SmartMapper Business UI, a separate component of TIBCO ActiveMatrix BusinessWorks Plug-in for SmartMapper, you can maintain cross-referencing data from the Web.

With TIBCO ActiveMatrix BusinessWorks Plug-in for SmartMapper, you can model and access cross-referencing relationships easily.

SmartMapper Business UI is an independent component of TIBCO ActiveMatrix BusinessWorks Plug-in for SmartMapper. It is not required to run on the same machine where the plug-in is running. As a web application, SmartMapper Business UI is accessible on any machine whenever the SmartMapper Business UI server is running. SmartMapper Business UI accesses to the same database to which the SmartMapper plug-in synchronizes data. Relationship and entities are loaded in SmartMapper Business UI and managed separately.



Use SmartMapper Business UI to maintain cross-referencing data. If you want to create entities or assemble relationships, use TIBCO ActiveMatrix BusinessWorks Plug-in for SmartMapper. See *TIBCO ActiveMatrix BusinessWorks Plug-in for SmartMapper User's Guide* for more details.



SmartMapper Business UI provides the following features:

- **Separated Relationship Management**
Association and identity relationships are managed separately. With SmartMapper Business UI, you can look up, create, update, and delete relationship instances. See [Managing an Association Relationship](#) and [Managing an Identity Relationship](#).
- **Entity Management**
With SmartMapper Business UI, you can look up, create, update, and delete entity instances. See [Managing an Entity](#).
- **User and Permission Managements**
An administrator account is created by SmartMapper Business UI by default. The administrator has privileges to create SmartMapper Business UI users and assign user roles to them. A user role defines which object a user has permission for and what the permission is. See [Managing Users](#) and [Managing Permissions](#).

Terminology

This section lists terms used in SmartMapper Business UI.

Entity

An *entity* represents an object, such as a customer record. Entities are composed of one or more attributes.

An entity is instantiated by specifying values for attributes. An entity can have multiple *entity instances*.

Relationship

A *relationship* captures how entities are related to each other. Two relationship types are supported, identity relationship and association relationship.

A relationship is instantiated by adding participant instances. A relationship can have multiple *relationship instances*.

Participant

A *participant* is the role that an entity plays in a relationship.

The entity instances that are added to a relationship instance become *participant instances*.

Anchor Participant

An *anchor participant* is the participant that is used to represent a relationship.

By default, SmartMapper Business UI randomly selects a participant from a relationship and sets it as anchor participant to represent this relationship. There is a one-to-one correlation between anchor participant instances and relationship instances.

Display Name

Display name is the participant name displayed in SmartMapper Business UI. By default, display name is the entity name of a participant.

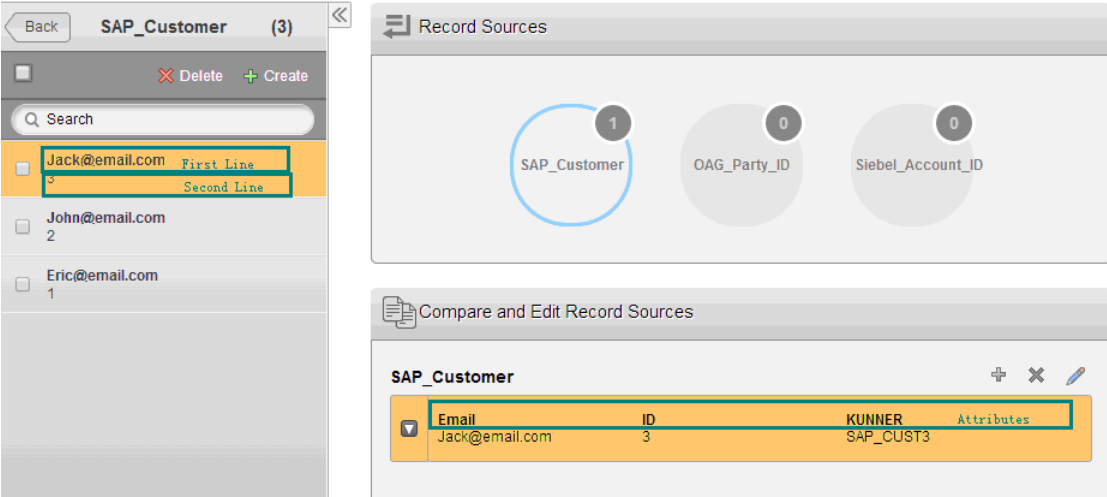
Display Field

In SmartMapper Business UI, participant instances and entity instances are listed as separate records in the left panel. Each record is displayed with two-line context.

An entity is configured with one or more key attributes and non-key attributes. When the SmartMapper Business UI server is started, the system randomly sets a predefined attribute as *display field*. The value of the display field is bolded and displayed in the first line to represent an entity instance; values of defined key attributes are displayed in the second line.

Take the SAP_Customer entity as an example, which is defined with three attributes, **ID**, **KUNNER**, and **Email**. **ID** is the key field. It is added to the Map_Acct_Party_Cust identity relationship, which assembles customer information across SAP, OAG, and Siebel systems.

Log in to SmartMapper Business UI and select the Map_Acct_Party_Cust identity relationship. As shown, the attribute **Email** is set as the displayed field.



Launching SmartMapper Business UI

SmartMapper Business UI is a web application, you are required to launch it from the Web.

Before launching SmartMapper Business UI, you are required to configure the property file that contains configurations regarding database connection, email, and session timeout interval. Next, start the SmartMapper Business UI server.

See [Prerequisites for Login](#) for more details.

Prerequisites for Login

Before logging in to SmartMapper Business UI, you are required to configure a property file and start the SmartMapper Business UI server.

When launching SmartMapper Business UI for the first time, ensure that you complete all the following tasks:

1. Configure a property file. See [Configuring a Property File](#) for more details.
2. Add the official driver for the database specified in the property file to the `TIBCO_HOME\bw\palettes\smartmapper\7.1\admin\lib` directory.
3. Start SmartMapper Business UI server. See [Starting the Server](#) for more details.



When the property file is configured and the driver is added, you can skip these two steps and start the server when launching SmartMapper Business UI next time.

Configuring the Property File

A property file is required to start SmartMapper BUI server. The SmartMapper BUI server connects to the database specified in the property file. Therefore, the cross-referencing data in the specified database is loaded in SmartMapper BUI.

Procedure

1. Navigate to the `TIBCO_HOME\bw\palettes\smartmapper\7.1\admin\config` directory and open the `bui_config.properties` file.
2. Provide a database connection in the "jdbc properties related" area.



When JDBC 4.0 or above is used, you do not have to configure the `jdbc.type` property.

3. Provide an email account in the "mail related" area. This email account is used to send emails when users forget the login password.



The value of the `mail.host` property is either the host name of an SMTP server or the IP address of an SMTP server.

4. Specify a session timeout value (in minutes) in the "session-timeout (minute)" area. The default timeout value is 30.

If no action is done before the session times out, the session ends. You are required to log in again.

5. Specify a single session timeout value (in minutes) in the "session-timeout (minute)" area. The default timeout value is 60.

When your session reaches this value, you are forced to log out from SmartMapper Business UI even if you are performing an operation in SmartMapper Business UI.



The minimum value for both session timeout and single session timeout is 10. If a smaller value is specified, 10 is used automatically.

Starting the Server

Before logging in to SmartMapper Business UI, you are required to start the SmartMapper Business UI server.

Prerequisites

Before starting the server, you are required to complete the following tasks:

- [Configure the Property File](#)
- Add the official driver for the database specified in the property file to the `TIBCO_HOME\bw\palettes\smartmapper\7.1\admin\lib` directory.



If the SmartMapper ER Model in the specified database has been changed since the last time the server was started, you are required to delete all the files residing in the `TIBCO_HOME\bw\palettes\smartmapper\7.1\admin\config\system` directory before starting the server.

Procedure

1. On a command line, direct to the `TIBCO_HOME\bw\palettes\smartmapper\7.1\admin` directory.
2. Run **startserver**.

A `server.log` file is generated in the `TIBCO_HOME\bw\palettes\smartmapper\7.1\admin\logs` directory.

What to do next

[Logging in to SmartMapper Business UI.](#)

Logging In to SmartMapper Business UI

After configuring the property file and starting the server, you can log in to SmartMapper Business UI to manager your cross-referencing data.

Prerequisites

Ensure that you complete all the tasks described in the [Preparations for Login](#) section. SmartMapper Business UI server must be running when using SmartMapper Business UI.

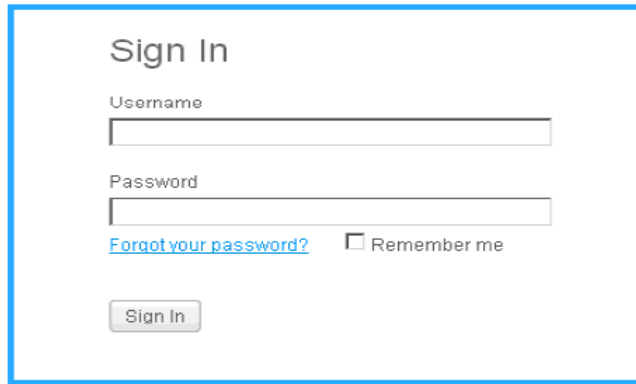
Procedure

1. Navigate to the `TIBCO_HOME\bw\palettes\smartmapper\7.1\admin\logs` directory.
2. Open the `server.log` file and find the URL at the end of content.
The log file is automatically generated when the SmartMapper Business UI server is started.
3. Open a web browser and go to the URL found in the log file.
4. Enter your user name and password on the **Sign In** page.



By default, an administrator account is created. The initial password for the admin user is `admin123`.

If you forget your password, click the **Forgot your password?** link. See [Forgot Your Password](#).



The image shows a 'Sign In' form. At the top is the title 'Sign In'. Below it are two input fields: 'Username' and 'Password'. To the left of the 'Password' field is a blue hyperlink that says 'Forgot your password?'. To the right of the 'Password' field is a checkbox followed by the text 'Remember me'. At the bottom of the form is a button labeled 'Sign In'.

5. Optional: Select the **Remember me** check box.

If this option is selected, your user name and password are remembered and you are not required to enter them again when you log in to SmartMapper Business UI next time. However, if you manually log out from SmartMapper Business UI, your user name and password are not saved.

6. Click **Sign In**.

Forgot Your Password

You can get your password back when you forget your login password.

Procedure

1. Click the **Forgot your password?** link on the **Sign In** page.
2. Enter your user name in the **Username** field on the **Forgot Password** page.
3. Enter the characters displayed in the image. The letters are not case sensitive.
4. Click **Send Email**.
5. Find your password from your email box.
6. Click the **Login** link to log in to SmartMapper Business UI.

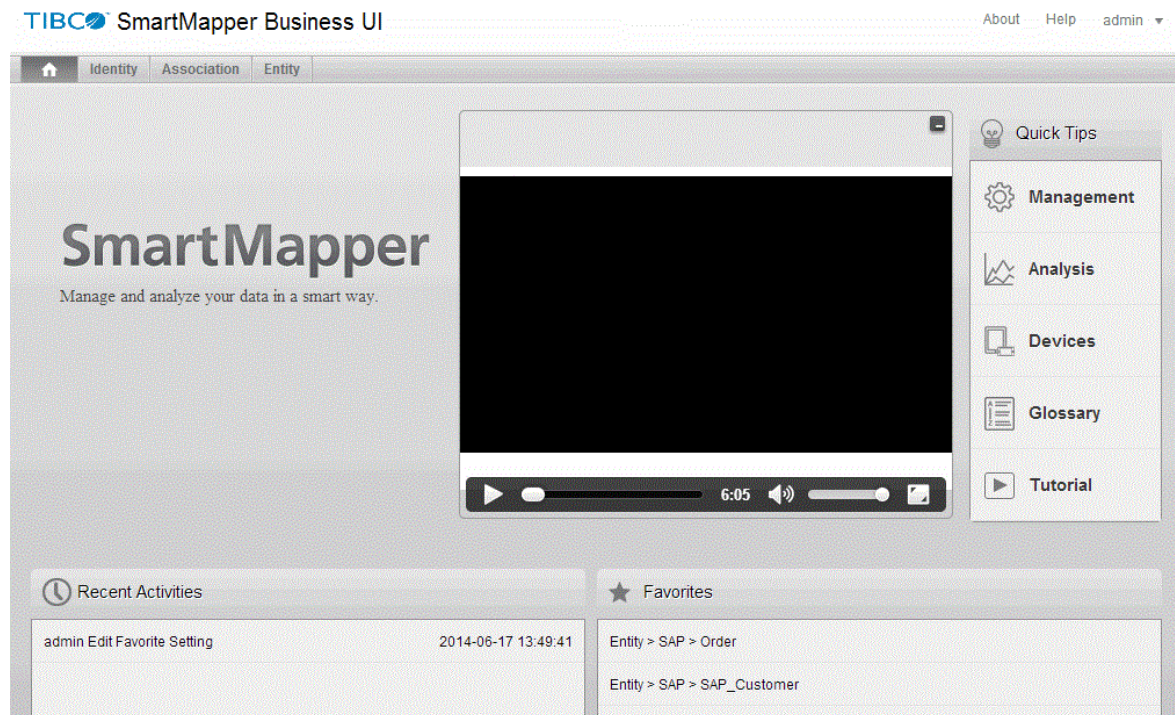
User Interface

Getting familiar with the user interface helps you quickly navigate to the function that you want to use.

- See [Home Page](#) for more details regarding product features.
- See [Relationship and Entity User Interfaces](#) for more details regarding relationships and entities.

Home Page

The home page shows product features from different perspectives. You are directed to the home page after you log in to SmartMapper Business UI.



As shown, the home page consists of:

- a menu. The following options are available from the menu:
 - **Identity** lists all the identity relationships that you have permission for. Select an identity relationship to manage from this tab.
 - **Association** lists all the association relationships that you have permission for. Select an association relationship to manage from this tab.
 - **Entity** lists all the entities that you have permission for. Select an entity to manage from this tab.

When clicking **Identity**, **Association**, or **Entity** from the menu, two more tabs are displayed:

- **Favorites**
Lists all your favorite relationships or entities. If you have not set up any favorite relationships or entities, click **Add favorites** in the **Favorites** tab to add one. See [Setting Up Favorite Relationships and Entities](#).
- **All**
Lists all the relationships or entities that you have permission for.



In **Favorites** and **All** tabs, entities are displayed in a tree structure. The first level is Application and the second level is Entity. Entities are grouped by applications.

- user account and product information.
 - Click **About** in the upper right corner of SmartMapper Business UI to view the product information.
 - Click **Help** in the upper right corner of SmartMapper Business UI to view the user's guide.
 - Click your account to edit your profile, or click **Log out** to log out from SmartMapper Business UI.
- a **Quick Tips** panel, which introduces how to use SmartMapper Business UI in relation to the following aspects:
 - **Management** introduces how to manage cross-referencing data.
 - **Analysis** introduces how to analyze cross-referencing data.
 - **Devices** introduces supported web browsers and devices.
 - **Glossary** introduces the terms used in SmartMapper Business UI.
 - **Tutorial** introduces how to use SmartMapper Business UI with a video.

Click **Tutorial** to hide the video. The **Quick Tips** panel expands with a short description for each topic when the video is hidden.

Click the corresponding item in the **Quick Tips** panel to get more information. A more detailed description is displayed in a new page. Slide the scrollbar down to view more.

- a **Recent Activities** panel.

It lists operations performed in the last seven days by all users. Operations are listed according to the operation time.
- a **Favorites** panel.

It lists relationship instances and entities that are set as favorite. The favorite items are displayed in accordance with the recently used time. Click a favorite item and you are brought to the page of the selected item.

Relationship and Entity User Interfaces

The relationship and entity user interfaces provide detailed information regarding the selected relationship or entity.

The pattern of Identity, Association, and Entity user interfaces are similar, and are divided into two parts:

- **Left Panel**

Lists relationship instances or entity instances of a relationship or an entity. All the operations to a relationship or an entity are performed in the left panel.
- **Right Panel**

List details of an entity instance or a relationship instance. All the operations to a relationship instance or entity instance are performed in the right panel.

Left Panel Overview

Content displayed in the right panel is often changed depending on the operations performed in the left panel. The content in the left panel is relative static, which contains the following generic information:

- List Header

The list header is the display name of the selected entity or the anchor participant that is used to represent the selected relationship. See [Display Name](#) for more details.

- Number

The number next to the list header, in brackets, is the number of anchor participant instances or entity instances.



When multiple SmartMapper Business UI servers connect to a same database, the number is not updated immediately. It is refreshed every 10 minutes.

- List Record

Records listed in the left panel are anchor participant instances or entity instances. One record is one anchor participant instance or entity instance.

Each record is displayed with two-line context. The first line is values of display fields; the second line is values of key fields. Values are separated by commas. See [Display Field](#) for more details.

- Pagination

The pagination bar is located at the bottom of the left panel, which displays 8 pages at most.

Take the Map_Acct_Party_Cust identity relationship as an example, which assembles a customer relationship across SAP, OAG, and Siebel systems. As shown, SAP_Customer is the anchor participant used to represent the Map_Acct_Part_Cust identity relationship, which has 4 participant instances. The attribute ID of SAP_Customer is the display field.

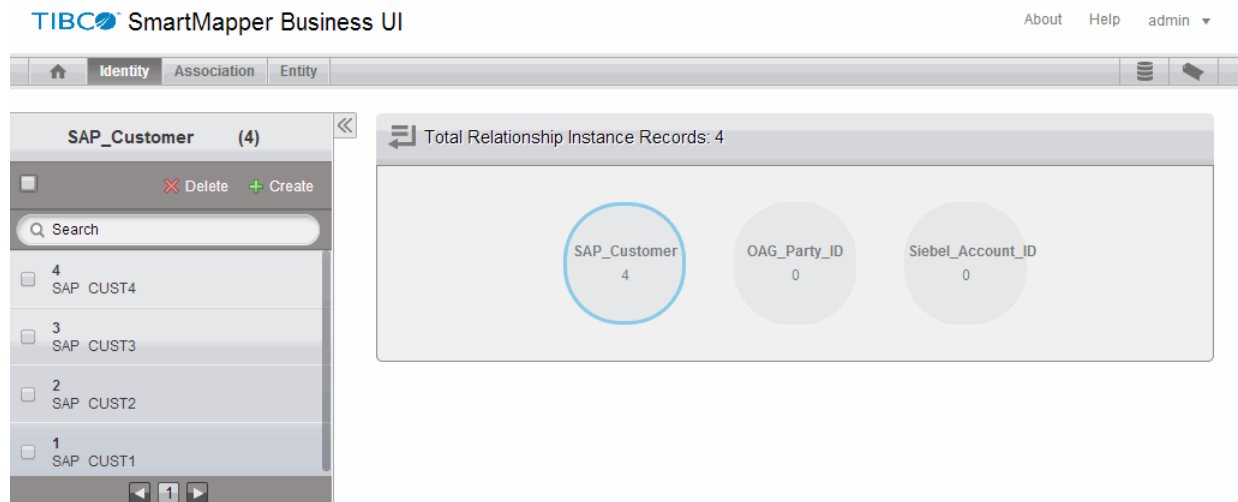
The screenshot shows the TIBCO SmartMapper Business UI interface. At the top, there's a navigation bar with 'Identity', 'Association', and 'Entity' tabs. Below this, a list of 'SAP_Customer' instances is displayed, with the first instance 'SAP_CUST4' highlighted. A callout box points to the list header 'SAP_Customer (4)' and explains that the number in brackets represents the total relationship instance records. To the right, a diagram shows three circles representing participants: 'SAP_Customer' with value '4', 'OAG_Party_ID' with value '0', and 'Siebel_Account_ID' with value '0'. The total relationship instance records are shown as 4.

Managing an Identity Relationship

With SmartMapper Business UI, you can search, create, delete, and update relationship instances of an identity relationship.

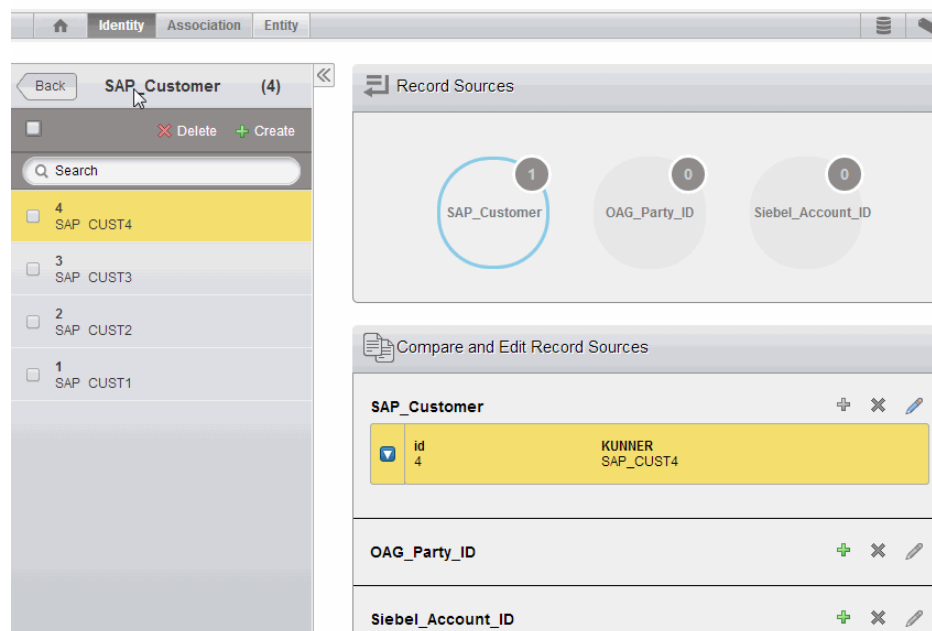
The management of an identity relationship is performed on the Identity Relationship Management page.

In the **Total Relationship Instance Records** panel, all the participants of the selected identity relationship are displayed with circles. The blue one is the anchor participant. The number in the circle is the number of participant instances. See [Relationship and Entity User Interfaces](#) for more information regarding the selected identity relationship.



Procedure

1. Log in to SmartMapper Business UI, as described in [Logging in to SmartMapper Business UI](#).
2. Click **Identity** from the menu and select an identity relationship. You are brought to the Identity Relationship Management page. As shown, SAP_Customer is the anchor participant to represent the Map_Acct_Party_Cust identity relationship.



3. Do the following steps to manage the selected identity relationship:

- Select the check boxes next to the anchor participant instances that you want to delete and click



in the left panel.



Only the relationship instances that are associated with the selected anchor participants are deleted. Corresponding entity instances are not deleted.

- Click in the left panel to add an identity relationship instance.

See [Creating an Identity Relationship Instance](#).

- Click an anchor participant to manage the identity relationship instance that this anchor participant is associated with.

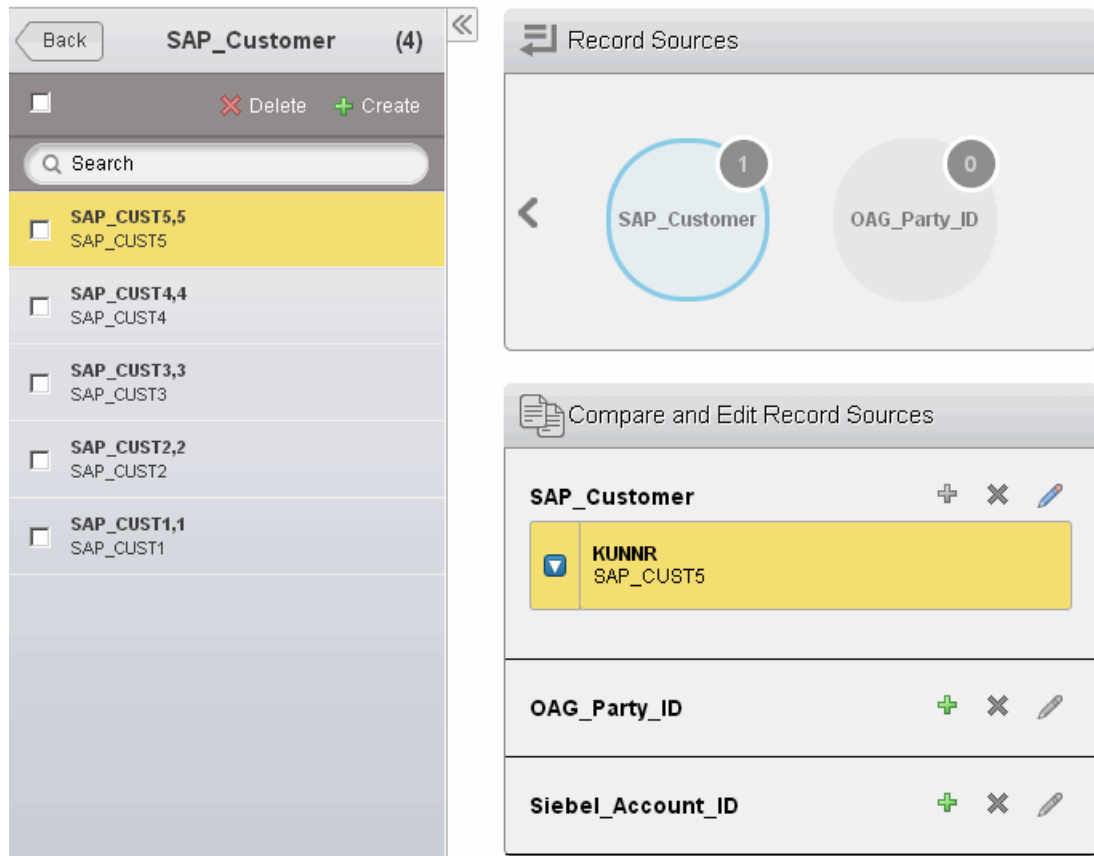
See [Editing an Identity Relationship Instance](#).

Creating an Identity Relationship Instance

A relationship is instantiated by adding participant instances. Creating identity relationship instances is to add participant instances for the anchor participant.

Procedure

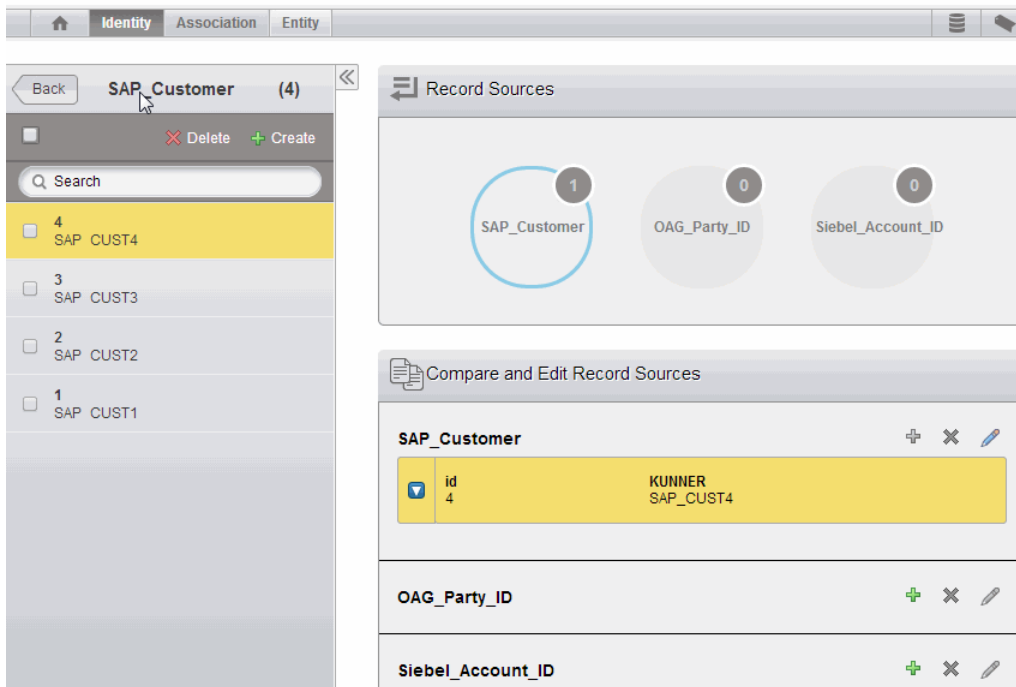
1. On the Identity Relationship Management page, click in the left panel.
2. Select a method to create an identity relationship instance.
 - **Create a new entry:** select it to create an identity relationship instance by creating a new anchor participant instance.
See [Creating an Entry](#).
 - **Choose from existing entries:** select it to create an identity relationship instance by selecting an existing anchor participant instance.
See [Choosing From Existing Entries](#).
3. Click **Save**.
The created identity relationship instance is highlighted and listed at the top of the list in the left panel.



Editing an Identity Relationship Instance

With SmartMapper Business UI, you can create, delete, and edit participant instances of an relationship instance.

After selecting the identity relationship instance that you want to update, participants of the identity relationship are displayed in the **Compare and Edit Record Sources** panel. Click each participant to view participant instances that have been added to the relationship instance.



Do the following steps to update the selected identity relationship instance:


- Click  next to the corresponding participants to create a participant instance to the identity relationship instance.

See [Adding a Participant Instance](#).

- Click  to delete the selected participant instance from the relationship instance.



Participant instances of the anchor participant cannot be deleted.

- Click  to update the selected participant instances. You can modify attribute values in the prompt dialog.



The entity instance that points to the same object as the selected participant instance is updated.

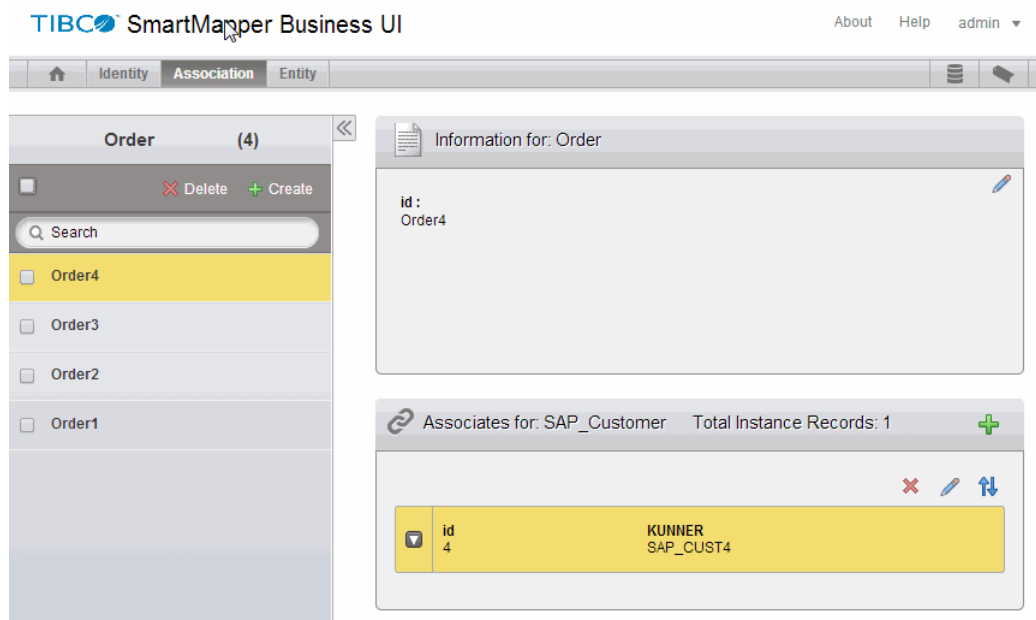
Managing an Association Relationship




With SmartMapper Business UI, you can search, create, delete, and update relationship instances of an association relationship.

The management of an association relationship is performed on the Association Relationship Management page. See [Identity Relationship User Interface](#) for more details regarding the selected association relationship.

Procedure

1. Log in to SmartMapper Business UI, as described in [Logging in to SmartMapper Business UI](#).
2. Click **Association** from the menu and select an association relationship. You are brought to the Association Relationship Management page. As shown, Order is the anchor participant to represent the Map_Order_Cust association relationship.



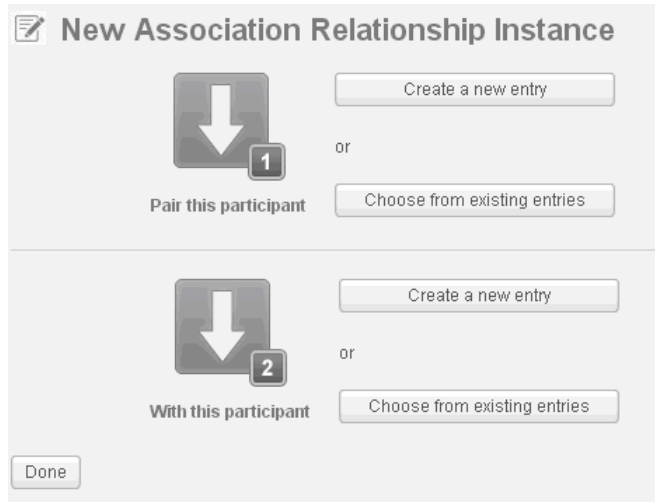
3. Do the following steps to manage the selected association relationship:
 - Select the check boxes next to the anchor participant instances that you want to delete and click  **Delete** in the left panel.
 Only the relationship instances that are associated with the selected anchor participants are deleted. Corresponding entity instances are not deleted.
 - Click  **Create** in the left panel to add an association relationship instance.
 See [Creating an Association Relationship Instance](#).
 - Click an anchor participant to manage the association relationship instance that this anchor participant is associated with. By default, the first anchor participant is selected.
 See [Editing an Association Relationship Instance](#).

Creating an Association Relationship Instance

An association relationship contains only two participants. To create an association relationship instance, you are required to add two participant instances at one time.

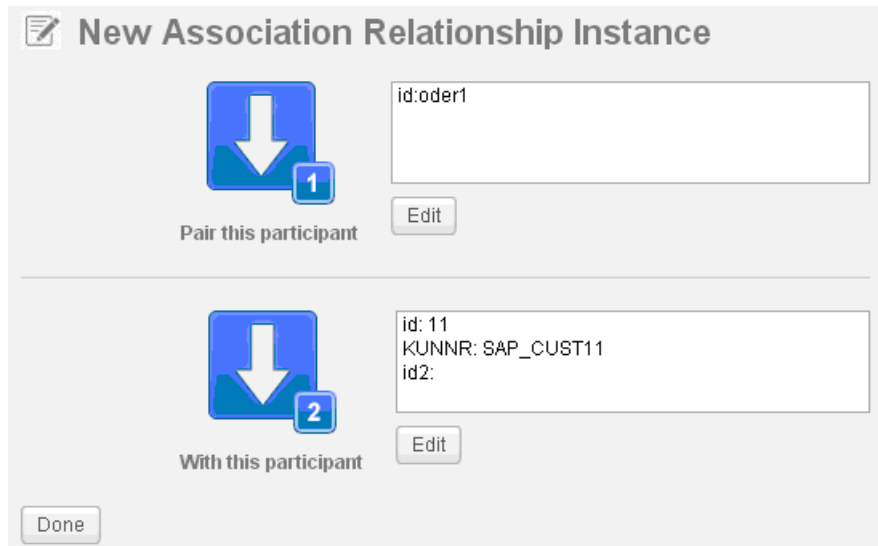
Procedure

1. On the Association Relationship Management page, click  in the left panel. The **New Association Relationship Instance** dialog is displayed.



The dialog titled "New Association Relationship Instance" shows two sections for adding participants. The first section, labeled "Pair this participant" with a "1" in a blue box, contains a large downward arrow icon and two buttons: "Create a new entry" and "Choose from existing entries". The second section, labeled "With this participant" with a "2" in a blue box, also contains a large downward arrow icon and the same two buttons. A "Done" button is at the bottom left.

2. Select a method to add a participant instance in the **Pair this participant** area. See [Adding a Participant Instance](#) for more details.
3. Select a method to add the other participant instance in the **With this participant** area. See [Adding a Participant Instance](#) for more details.
4. Click **Done** when both the participant instances are added.

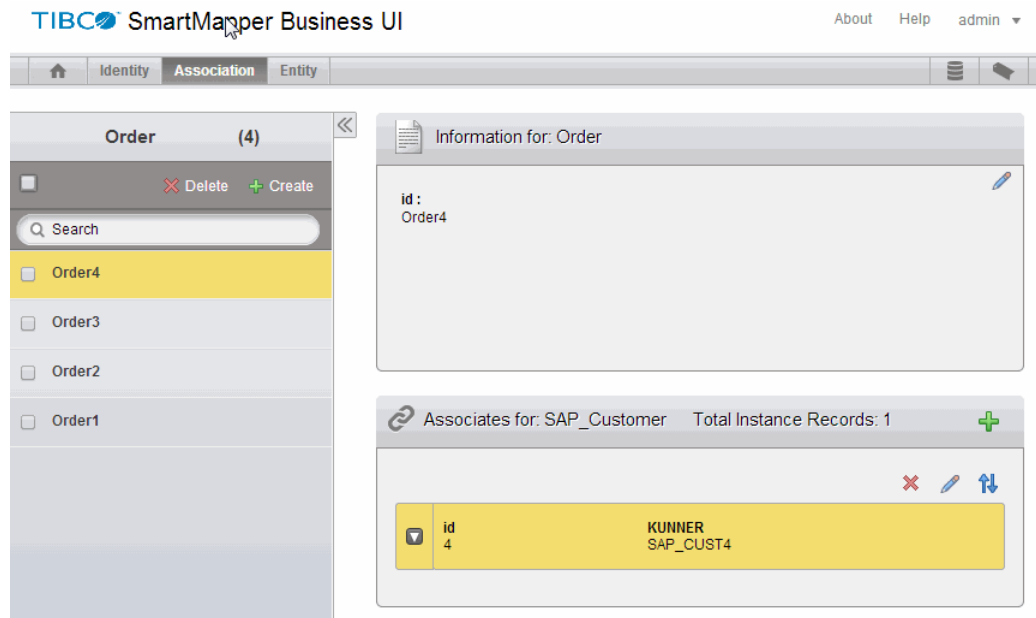


The dialog is now populated with data. The "Pair this participant" section (labeled "1") shows a blue downward arrow icon, the text "id:oder1" in a text box, and an "Edit" button. The "With this participant" section (labeled "2") shows a blue downward arrow icon, a text box containing "id: 11", "KUNNR: SAP_CUST11", and "id2:", and an "Edit" button. A "Done" button remains at the bottom left.


Editing an Association Relationship Instance


With SmartMapper Business UI, you can create, delete, and update participant instances of an association relationship instance.


After selecting the association relationship instance that you want to update, detailed information of the anchor participant instance is displayed in the **Information for** panel and detailed information of the other participant instance is displayed in the **Associates for** panel.





Do the following steps to update the selected association relationship instance:


- Click  in the **Information for** panel to modify attribute values of the selected anchor participant instance.





The entity instance points to the same object as the selected participant instance is updated.
- Click  in the **Associates for** panel to add a participant instance.

See [Adding a Participant Instance](#).
- Click  in the **Associates for** panel to delete the selected participant instance from the relationship instance.




Participant instances of the anchor participant cannot be deleted.
- Click  in the **Associates for** panel to modify attribute values of the associated participant.



The entity instance that points to the same object as the selected participant instance is updated.
- Click  to reverse the position of two participants.

The anchor participant is displayed in the **Associates for** panel so that you can add participant instances for the anchor participant.



Although the associated participant is listed in the left panel after clicking , the anchor participant does not change. See [Editing Participants](#) for more details about how to change the anchor participant.

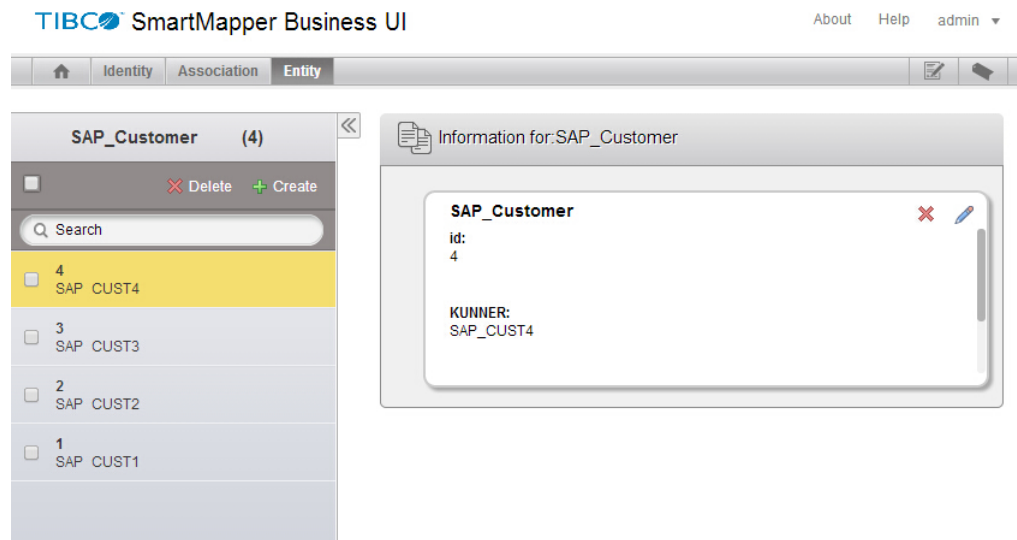
Managing an Entity





With SmartMapper Business UI, you can create, update, and delete entity instances.

When editing a participant of a relationship, the corresponding entity is also changed. See [Managing Participants](#) for more details.

Procedure

1. Log in to SmartMapper Business UI, as described in [Logging in to SmartMapper Business UI](#).
2. Click **Entity** from the menu.
3. Expand an application and select an entity.
You are brought to the Entity Management page. All the entity instances are listed in the left panel.




4. Do the following steps to update the selected entity:
 - Click  in the upper right corner to update display fields of the entity.
See [Changing Display Field](#) for more details.
 - Select check boxes next to entity instances and then click  in the left panel.
The selected entity instances are deleted.
 - Click  in the left panel to create an entity instance.
See [Creating an Entity Instance](#) for more details.
 - Click  in the **Information for** panel to update the selected entity instance.


Changing Display Field

Values of display fields are bolded and displayed in the first line to represent an object. By default, the system automatically sets up a display field.

With SmartMapper Business UI, you can change the display field of an entity when managing it on the Entity Management page. If an entity is added to a relationship and set up as the anchor participant, you can also change the display field when editing participants. See [Editing Participants](#) for more details.

Procedure

1. Click **Entity** from the menu and select the entity that you want to change the display field.
 2. Click .


The **Available Display Fields** panel lists all the entity attributes that are defined when creating the entity. See *TIBCO ActiveMatrix BusinessWorks Plug-in for SmartMapper User's Guide* for details.
 3. Select one or more attributes in the **Available Display Fields** panel and click **Add**.
The selected attributes become display fields. See [Display Field](#) for more details.
 4. Select one or more attributes in the **Selected Display Fields** panel and click **Remove**.
The selected attributes are no longer display fields anymore.
- 

If an entity only has only one key field defined, the field is selected as the display field by default and cannot be removed.
5. Click **Move Up** or **Move Down** to adjust the order of display fields.
 6. Click **Save** to save your changes.

Creating an Entity Instance

An entity represents a complete key to an object, which is instantiated by providing attribute values.

Procedure

1. Log in to SmartMapper Business UI, as described in [Logging in to SmartMapper Business UI](#).
2. Click **Entity** from the menu.
3. Expand an application and select the entity that you want to add entity instances to.
4. Click  **Create** in the left panel.
5. Provide a value for each predefined attribute in the **New Entity Instance for Entity_name** dialog. Click **Save**.
These attributes are defined when creating the entity in TIBCO ActiveMatrix BusinessWorks Plug-in for SmartMapper. See *TIBCO ActiveMatrix BusinessWorks Plug-in for SmartMapper User's Guide* for more details.



If an attribute is followed by the word **key** in red, it indicates that the attribute is a key field. If not, the attribute is a non-key field. Additionally, if an attribute is marked with an asterisk (*), it indicates that an attribute is required.

Managing Participants

With SmartMapper Business UI, not only you can create, update, and delete participant instances, but also you can change the anchor participant and update display fields of the anchor participant.

Entity and *Participant* are two labels of an object. When an entity is added to a relationship, it becomes a participant. Hence, operations performed on a participant are also applied to the entity that points to the same object the participant points to.

Adding a Participant Instance

With SmartMapper Business UI, you can add a new participant instance or an existing participant instance to a relationship instance.

When adding a participant instance for an identity relationship instance or an association relationship, you are prompted with the following options:

- [Creating a New Entry](#)
- [Choosing From Existing Entries](#)

Creating a New Entry

Use the **Create a new entry** option to create a participant instance.

Procedure

1. Click **Create a new entry**.

2. Provide a value for each predefined attribute.
If an attribute is followed by a word **key** in red, it indicates that the attribute is a key field. If not, the attribute is a non-key field. Besides, if an attribute is marked with an asterisk (*), it indicates that the attribute is required.
3. Click **Save**.

Choosing From Existing Entries

Use the **Choose from existing entries** option to select an existing participant instance to add it to a relationship instance. All the instances of the entity that are added to a relationship are available participant instances for selection.

Procedure

1. Click **Choose from existing entries**.

2. Optional: Provide a value for each attribute in the **Narrow your search by** panel to search entity instances.
3. Click **Search**.
Entity instances that conform to the search criteria specified in [Step 2](#) are displayed.



If no search criteria is specified, all the existing entity instances are displayed. The first 20 entity instances are displayed in the right panel. Slide the scrollbar down to view more.

4. Click the entity instance that you want to add to the relationship instance from the right panel and click **Select**.



If an entity instance is grayed out, it indicates that the entity is already added to an identity relationship instance and cannot be added to another identity relationship instance.


Editing Participants

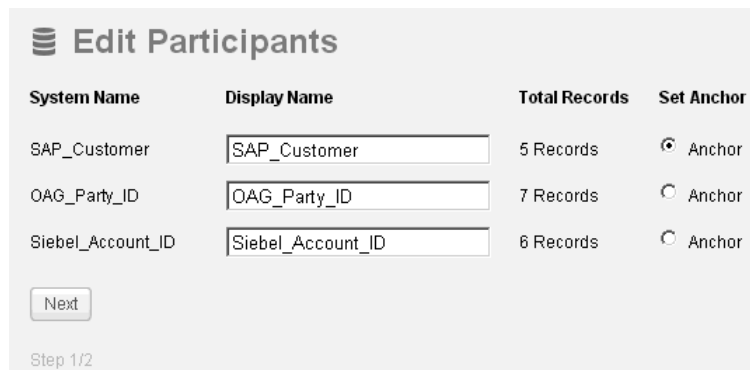
With SmartMapper Business UI, you can change display names of participants, set up anchor participants, and change display fields for anchor participants.



Only the administrator has permission to edit participants.

Procedure

1. Click  in the upper right corner on the Relationship Management page. Participants in the selected relationship are displayed on the **Edit Participants** dialog. The number under the **Total Records** field is the number of participant instances.



Edit Participants

System Name	Display Name	Total Records	Set Anchor
SAP_Customer	<input type="text" value="SAP_Customer"/>	5 Records	<input checked="" type="radio"/> Anchor
OAG_Party_ID	<input type="text" value="OAG_Party_ID"/>	7 Records	<input type="radio"/> Anchor
Siebel_Account_ID	<input type="text" value="Siebel_Account_ID"/>	6 Records	<input type="radio"/> Anchor

Step 1/2

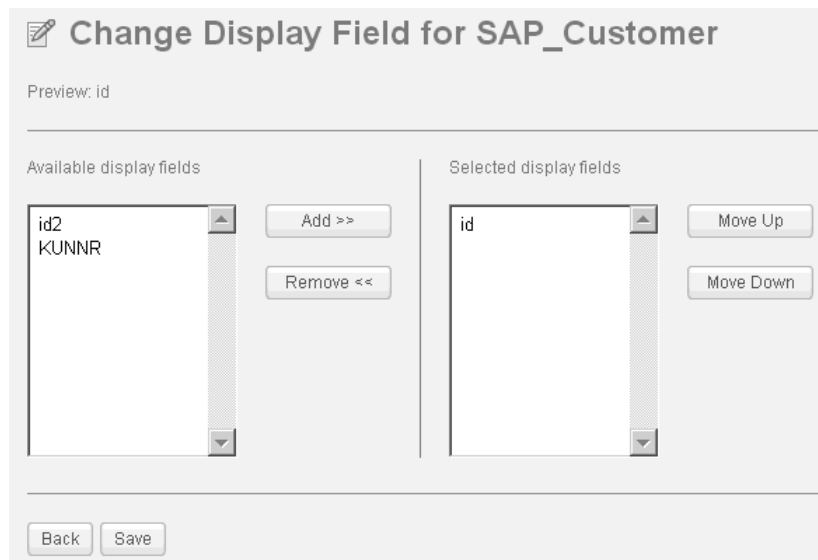
2. Provide a new display name for each participant in the corresponding **Display Name** field.

3. Click **Next** to update display fields of the anchor participant.

You can also change the display field through the Entity Management page, see [Changing Display Field](#).

You are directed to the **Change Display Field for entity_name** dialog.

Fields in the **Available display fields** panel are entity attributes defined in the SmartMapper ER Model.



Change Display Field for SAP_Customer

Preview: id

Available display fields		Selected display fields	
id2	<input type="button" value="Add >>"/> <input type="button" value="Remove <<"/>	id	<input type="button" value="Move Up"/> <input type="button" value="Move Down"/>
KUNNR			

4. Select one or more attributes in the **Available display fields** panel and click **Add**. The selected attributes become display fields. See [Display Field](#) for more details.

5. Select one or more attributes in the **Selected display fields** panel and click **Remove**. The selected attributes are no longer display fields anymore.



If an entity only has only one key field defined, the field is selected as the display field by default and cannot be removed.


6. Click **Move Up** or **Move Down** to adjust the order of display fields.

7. Click **Save** to save your changes or click **Back** to go back to the **Edit Participants** dialog.

Setting Up Favorite Relationships and Entities


Favorite relationships and entities are listed in the corresponding **Favorites** panel. With them, you can quickly find the relationship or entity that you are interested in.

Procedure

1. Click  in the upper right corner on the Entity Management page or the Relationship Management page.
2. Optional: Enter a new name for an entity when you want to change the display name of the entity.









Only the administrator has permission to change entity names. The application name cannot be changed.



3. Click  in the corresponding text field.
When an entity or a relationship is set as favorite, the star next to it is filled with yellow.



Different from identity relationships and association relationships, entities are grouped by applications. If an application is set as favorite, all the entities in the application are automatically set as favorite.

Manage labels and favorites

A		OAG:	OAG	
B				
C		SAP:	SAP	
D				
E				
F		Sibel:	Sibel	
G				
H				
I				
J				
K				
L				
M				
N				
O				
P				
Q				
R				
S				
T				
U				
V				
W				
X				
Y				
Z				
#				

Save

Managing Users and Permissions

With SmartMapper Business UI, the administrator can manage users and user permissions and also the login users can edit their profiles.

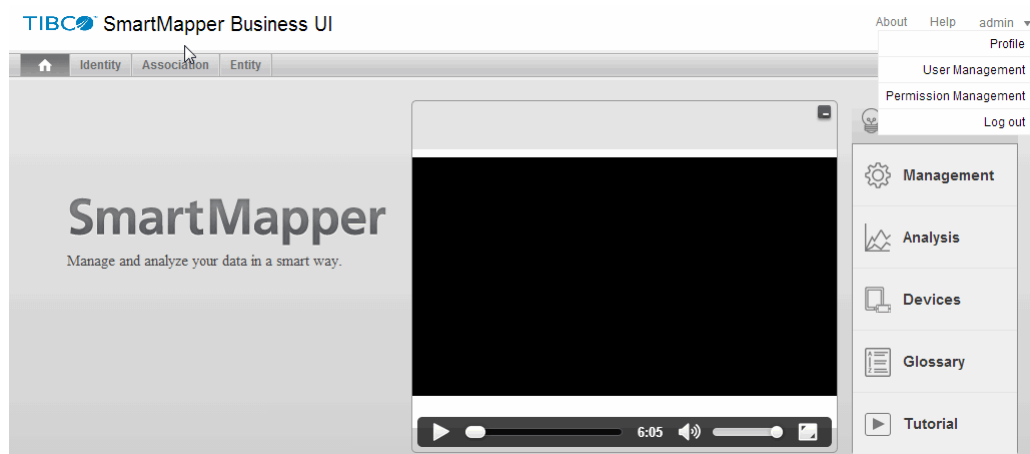
An administrator is automatically created by SmartMapper Business UI. The user name of this administrator is `admin` and the default password is `admin123`. An administrator has privileges to manage users that use SmartMapper Business UI and govern user permissions.

Procedure

1. Log in to SmartMapper Business UI, as described in [Logging in to SmartMapper Business UI](#).
2. Click your account. The following options are available:



User Management and **Permission Management** are available only for the administrator.





- Click **Profile** to manage your account information.
See [Managing User Profile](#).
- Click **User Management** to manage users using SmartMapper Business UI.
See [Managing Users](#).
- Click **Permission Management** to manage permission roles that are assigned to SmartMapper Business UI users.
See [Managing Permissions](#).
- Click **Log out** you to log out from SmartMapper Business UI.

Managing User Profile

Use the **Profile** option to update your account.

Procedure

1. Click your account in the upper right corner of SmartMapper Business UI and click **Profile**.
2. Update your account according to the following information.

Account Information	Description
Username	<p>You user name used to log in to SmartMapper Business UI.</p> <p> User name cannot be changed.</p>
First Name	Your first name.
Last Name	Your last name.
Email	The email to receive emails sent by SmartMapper Business UI when you forget your password.
User Role	<p>The user role that the administrator assigns to you.</p> <p>A user role determines which entity or relationship a user has permission for as well as what the permission are.</p> <p> The user role of the admin user is administrator, which is automatically assigned and cannot be changed.</p>
Password	The password used to log in to SmartMapper Business UI.
Confirm Password	Confirmation of the password.

3. Click **Save** to save your changes.

Managing Users

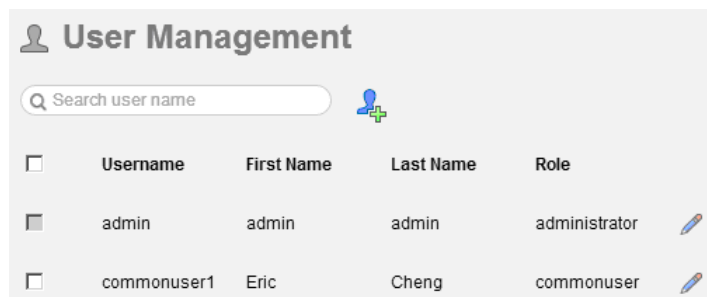
Use the **User Management** option to create, delete, and update SmartMapper Business UI users.





Only the administrator has privileges to manage users.

Procedure

1. Click your account in the upper right corner of SmartMapper Business UI and click **User Management**.



2. Do the following steps to manage SmartMapper Business UI users:
 - Enter the user name of the user that you want to search in the search field.
 - Click  to add a user. See [Adding a User](#).
 - Select check boxes next to the users that you want to delete and click .

- Click  to edit a user.




The user name of a user cannot be changed.

Adding a User

The administrator has privilege to add users for SmartMapper Business UI. The added users have defined permission for specific objects.

Procedure

1. Click your account in the upper right corner of SmartMapper Business UI and click **User Management**.
2. Click  in the **User Management** dialog.
3. Enter a user name in the **Username** field. The user name is used to log in to SmartMapper Business UI.



A user name conforms to the following rules:

- Starts with alphanumeric characters.
- Cannot contain any special symbols except for underscores (_).
- Contains 3 characters at least and 15 characters at most.
- Is case-sensitive. If a user name "ABC" already exists, "abc" cannot be used as a user name anymore.

4. Enter the first name of the user in the **First Name** field.
5. Enter the last name of the user in the **Last Name** field.
6. Enter the email of the user in the **Email** field. This email is used to receive emails sent by SmartMapper Business UI when the user forgets the login password.
7. Select a user role from the list.
By default, a `commonuser` role is selected. With this role assigned, the user has `write` permission for all the existing relationships and entities. To create more user roles for selection, see [Adding User Roles](#).
8. Enter a password for the user in the **Password** field.
9. Enter the password again in the **Confirm Password** field.
10. Click **Save** to add the user according to the specified information.

Managing Permissions

Use the **Permission Management** option to manage user roles.

In SmartMapper Business UI, what permission a user has is decided by the assigned user role. A user role is a collection of permission defined for entities and relationships. It determines which relationship or entity a user has permission for and what the permission is.

Different users are assigned with different user roles. A user only has the permission defined in the assigned user role.

User roles are defined in a permission file. To add more user roles, complete the following tasks:

1. [Adding User Roles](#)
2. [Uploading the Permission File](#)



If an ER Model is synchronized after the SmartMapper Business UI server is started, the newly added relationships and entities have no permission assigned by default. Also, for common users, the newly added relationships and entities are invisible. The administrator needs to change the permission for each added relationship and entity in the permission file, and then upload the permission file to SmartMapper Business UI.

Adding User Roles

A user role defines which relationship or entity a user has permission for and what the permissions is. With SmartMapper Business UI, the administrator can add more user roles to assign to users.

User roles are defined in the `role_permissions.xml` permission file, which is generated when starting the SmartMapper Business UI server. By default, a `commonuser` role is created. A user with this user role assigned has `Write` permission for all existing entities and relationships.

Procedure

1. Navigate to the `TIBCO_HOME\bw\palettes\smartmapper\7.1\admin\config\system` directory and open the `role_permissions.xml` file.

2. Append the following node after the `roles` node to add a new user role.

```
<role name="name" description="description">
</role>
```

where **name** is the name of the user role and **description** is the description of the user role.

3. Append the following node under added `role` node to specify the permission that a user has for an entity.

```
<application name="application_name">
  <entity name="entity_name" permission="W|R|N"/>
</application>
```

where **name** is the name of an application and an entity, and **permission** is the permission for the entity. The value of **permission** is W, R, or N. See [Permission](#) for more details.



When defining permission for entities, the application to which the entities to be added is required.

4. Append the following node under the added `role` node to specify the permission that a user has for a relationship.

```
<relationship name="relationship_name" permission=W|R|N/>
```

where **name** is the name of a relationship and **permission** is the permission for the relationship. The value of **permission** is W, R, or N. See [Permission](#) for more details.

5. Repeat [Step 3](#) and [Step 4](#) to assign permissions for other entities and relationships. Save the permission file.

What to do next

[Uploading the Permission File.](#)

Permission

With SmartMapper Business UI, the administrator can grant users Writer or Read permission for specific entities and relationships.

When adding user roles in the `role_permissions.xml` permission file, the following permissions are available to be granted:

Permission	Value	Description
Write	W or w	The element defined with this permission can be viewed, created, deleted, and updated by the user who is assigned with this role.
Read	R or r	The element defined with this permission can be viewed by the user who is assigned with this role.
None	N or n	The element defined with this permission is not visible for the user who is assigned with this role.

Uploading the Permission File

The user roles defined in the `role_permissions.xml` permission file are available to select only when the permission file is uploaded to SmartMapper Business UI.

Prerequisites

Ensure that you have updated the permission file, as described in [Adding User Roles](#). Only the administrator has privilege to upload the permission file.

Procedure

1. Click your account in the upper right corner of SmartMapper Business UI and click **Permission Management**.
2. Click **Browse** to direct to the location where the updated permission is located and click **Upload**.



The permission file to be loaded must be in XML format. If the permission file contains any non-existing relationships, applications, or entities, uploading fails.

The uploaded permission file is located in the `TIBCO_HOME\bw\palettes\smartmapper\7.1\admin\config\system\permissions_upload_folder` directory.

SmartMapper Business UI is refreshed automatically after the permission file is uploaded.

3. Click **Export** to export the permission file currently in use.