

# **Gentran Integration Suite**

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## **Manage Resources**

**Version 4.3**

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## About Resources

### What Are Resources?

*Resources* are files, templates, and documents that may be deployed in Gentran Integration Suite and that you can import and export from one Gentran Integration Suite system to another, such as when you are migrating from a test to production environment. For example, business process models, maps, XML schemas, and report configurations are all resources.

Because Gentran Integration Suite stores your configured resources as entities in the system, you can configure them on one system and then later, as the need arises, export a copy from the system and import that copy into a second system. In this way, you can avoid having to recreate the same resources on other systems.

### Resource Management Tasks

You work with resources any time you configure any of the supported resource types as part of your ongoing Gentran Integration Suite activities.

Gentran Integration Suite provides tools to manage resources. You can add resources to Web archive (.war) files or .xml files to easily deploy the resources in another environment. Managing resources can involve:

- ◆ Exporting resources from a system as .xml files
- ◆ Importing resources into a system
- ◆ Locking and unlocking resources
- ◆ Creating and modifying resource tags (a tag is a name that identifies a group of associated resources), including associating resources with resource tags

You use the Resource Manager to access the Resource Tag and Import/Export wizards (from the Administration menu, select **Deployment > Resource Manager**).

### Resources List

The following list describes the resources that are supported in Gentran Integration Suite:

- ◆ Accounts – Configuration data that describes user accounts. Subcategories include:
  - ◆ Users
  - ◆ Groups
  - ◆ Permissions
- ◆ Application Configurations – For SAP, this resource is configuration data that describes application setup.
- ◆ Business Processes – Business process model definitions and their associated particulars.
- ◆ Communities – Data that describes trading partner communities, including adding or deleting protocols and document types.

- ◆ Digital Certificates – User identification data for secure communications, which contains a user's public key, identity information, and one or more digital signatures. Subcategories include:
  - ◆ CA
  - ◆ Trusted
  - ◆ System
- ◆ ebXML Specifications – Data that describes ebXML Business Process Specification Schema (BPSS) and Collaboration Protocol Agreement (CPA) defined when setting up trading profiles.
- ◆ Extended Rule Libraries – Data defining a list of extended rules, used in the Map Editor to define complex mapping transactions, saved in a separate file outside of the Map Editor source.
- ◆ Maps – Source maps of either the .mxi or .map versions and translation objects (.txo) and XML encoder objects (.ltx).
- ◆ Mailboxes – Configuration data for setting up mailboxes and services. When mailbox details are exported, all the associated users are also exported, even if they are not chosen to be exported.
- ◆ PGP Profiles – Pretty Good Privacy (PGP) configuration data used to encrypt and decrypt documents.
- ◆ Perimeter Servers – Configuration data defined when setting up perimeter servers and services.
- ◆ Proxy Netmaps – Configuration data for netmaps used with Sterling Secure Proxy.
- ◆ Proxy Policies – Configuration data for policies used with Sterling Secure Proxy.
- ◆ Report Configurations – Configuration data defined when specifying the reports to be generated.
- ◆ Schedules – Configuration data used to define business processes and services that run in Gentran Integration Suite.
- ◆ XML schemas – Data that makes up XML schemas.
- ◆ Security Tokens – Configuration data defined to ensure that only authorized users can access the data associated with the token, such as by identifying and checking the credentials of Web Services users so that they can send and receive documents.
- ◆ Service Configurations – Data defined when creating service configurations (restricted to operator-level permissions).
- ◆ SSH Keys – Security key data used for authentication between partners when establishing a session for SSH/SFTP or SSH/SCP data transfer.
- ◆ SWIFTNet Routing Rules – The SWIFTNet Routing Rule is created by the Responder and is used by the SWIFTNet Server adapter to manage interactive messages from the Gentran Integration Suite SWIFTNet MEFG Server. The rule routes an incoming request message to a user-defined business process.
- ◆ Trading Partner Data – Configuration data defined with trading profiles. Subcategories, known as partner resources, include:
  - ◆ Packagings
  - ◆ Identities
  - ◆ Contracts
  - ◆ Envelopes
  - ◆ Control numbers
  - ◆ Code lists

- ◆ Web Resources – Data that makes up XSLT style sheets.
- ◆ Web Services – Configured resource data that makes up Web services, including service and adapter configurations, digital certificates, business process models, XML schemas, WSDL, and Web services group configurations.
- ◆ WSDL – Data that describes Web Service Definition Languages (WSDL).
- ◆ XSLTs – Data that makes up XSLT style sheets.

Depending on the type of resource you are importing or exporting, limitations may apply. For example, you can import the document envelope data originally saved for trading partners in Gentran:Basic, but you cannot import the complete trading partner profile.

For the most current list of supported resources, see the Export wizard in the Gentran Integration Suite interface. The Select Resources page always displays all the resources that are supported for a given release. To access the page:

1. Select **Deployment > Resource Manager > Import/Export**.
2. Next to **Export Resources**, click **Go!**
3. Click **Next** on the following three pages.

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## About Versioning of Resources

In Gentran Integration Suite, resources may be non-versioned or versioned.

*Versioned resources*, such as business process models and service configurations, may have multiple copies, or versions, saved in the Gentran Integration Suite system. Each time you modify one of these versioned resources, the system saves the data as a new version, while retaining a copy of the resource as it existed prior to your modifications. Any time you check in a versioned resource, Gentran Integration Suite enables you to set which version of the resource — either the version you are checking in or a previously saved version—as the default version. The *default version* is the copy of a resource that Gentran Integration Suite uses during processing, unless otherwise specified in processing instructions.

The concept of versioning is integral to your resource management needs. For example, access through Gentran Integration Suite to saved copies of each iteration of a resource enables you to easily review the components of older versions or revert to using them at any time. This saves you the effort of storing older versions in another location or reproducing the work involved in creating them if you need to revert to a previous configuration. You can also change which copy is the default version as needed.

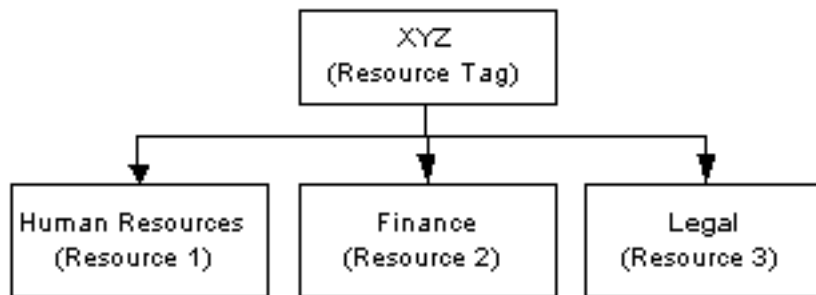
*Non-versioned resources* are resources, such as user accounts, for which only one, current, copy is saved in Gentran Integration Suite at any time. When you modify a non-versioned resource, the new resource replaces the old resource in the system.

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## About Resource Tags

A *resource tag* is a name you use to identify a group of associated resources. A resource tag is much like a company name, with each department being a Web resource associated with the resource tag. For example, XYZ company has Human Resources, Finance, and Legal departments. The company name, XYZ, is the resource tag, and the Human Resources, Finance, and Legal departments are Web resources that are associated with the XYZ resource tag.

Gentran Integration Suite enables you to associate a resource with more than one resource tag.



Before you can create a resource tag, resources to associate with the tag must be saved in Gentran Integration Suite.

Managing resource tags may involve:

- ◆ Creating resource tags
- ◆ Editing a resource tag to add or delete resources from the tag
- ◆ Copying the resource tag to use as the basis for a new tag with a different name
- ◆ Deleting resource tags that have become obsolete

You can create resource tags as needed to define your resource groupings, and you can also create a tag during the import resources procedures, to assign a new tag on the fly to resources you are importing.



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## Create a Resource Tag

To create a resource tag:

1. From the **Deployment** menu, select **Resource Manager > Resource Tags**.
2. Next to **Create a new Resource Tag**, click **Go!**
3. Type a unique name for the resource tag.  
Do not use special characters in the name.
4. Type a description of the resource tag and click **Next**.  
Do not use special characters in the description.
5. Select the types of resources to associate with this resource tag and click **Next**.  
When creating a resource tag for a Web archive (.war) file for Web Extensions, select the **Business Processes** and **Web Resources** resource types.
6. Associate the resource type with a resource tag.

The following table describes the various resource types and procedures to associate a resource type with a resource tag. When you have finished selecting the resources, verify your selections in the Confirm page and click **Finish**.

If You Select	Complete These Steps
Accounts	<ol style="list-style-type: none"><li>1. From the <b>Accounts Resources</b> list, select the accounts resources you want to associate with this resource tag.</li><li>2. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the accounts resource that you want to filter for and click the Filter button to the right of the field.</li><li>3. In each resource page for each accounts resource chosen, select the resources from the available list.</li><li>4. Use the arrows to move the resources to the To Be Associated list and click <b>Next</b>.</li></ol>
Application Configurations (only SAP)	<ol style="list-style-type: none"><li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the application configuration that you want to filter for and click the Filter button to the right of the field.</li><li>2. Select the configurations from the available list.</li><li>3. Use the arrows to move the configurations to the To Be Associated list and click <b>Next</b>.</li></ol>
Business Processes	<ol style="list-style-type: none"><li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the business process that you want to filter for and click the Filter button to the right of the field.</li><li>2. Select the business processes from the available list.</li><li>3. Use the arrows to move the business processes to the To Be Associated list and click <b>Next</b>.</li></ol>

If You Select	Complete These Steps
Digital Certificates	<ol style="list-style-type: none"> <li>1. From the <b>Digital Certificates</b> list, select the types of digital certificates you want to associate with the resource tag.</li> <li>2. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the digital certificate resource that you want to filter for and click the Filter button to the right of the field.</li> <li>3. In each resource page for each digital certificate resource chosen, select the resources from the available list.</li> <li>4. Use the arrows to move the resources to the To Be Associated list and click <b>Next</b>.</li> </ol>
Communities	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the community that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the communities from the available list.</li> <li>3. Use the arrows to move the communities to the To Be Associated list and click <b>Next</b>.</li> </ol>
ebXML Specifications	<ol style="list-style-type: none"> <li>1. From the <b>ebXML Specifications Resources</b> list, select the ebXML resources you want to associate with this resource tag.</li> <li>2. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the ebXML resource that you want to filter for and click the Filter button to the right of the field.</li> <li>3. In each resource page for each ebXML resource chosen, select the resources from the available list.</li> <li>4. Use the arrows to move the resources to the To Be Associated list and click <b>Next</b>.</li> </ol>
Extended Rule Libraries	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the extended rule library that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the extended rule libraries from the available list.</li> <li>3. Use the arrows to move the extended rule libraries to the To Be Associated list and click <b>Next</b>.</li> </ol>
Maps	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the map that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the maps from the available list.</li> <li>3. Use the arrows to move the maps to the To Be Associated list and click <b>Next</b>.</li> </ol>

If You Select	Complete These Steps
Mailboxes	<ol style="list-style-type: none"> <li>1. From the <b>Mailbox Resources</b> list, select the mailbox resources you want to associate with this resource tag.</li> <li>2. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the mailbox resource that you want to filter for and click the Filter button to the right of the field.</li> <li>3. In each resource page for each mailbox resource chosen, select the resources from the available list.</li> <li>4. Use the arrows to move the resources to the To Be Associated list and click <b>Next</b>.</li> </ol> <p><b>Note:</b> When mailbox details are exported, all the associated users are also exported, even if they are not chosen to be exported.</p>
PGP Profiles	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the PGP profile that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the PGP profiles from the available list.</li> <li>3. Use the arrows to move the PGP profiles to the To Be Associated list and click <b>Next</b>.</li> </ol>
Proxy Policies	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the proxy policy that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the proxy policies from the available list.</li> <li>3. Use the arrows to move the proxy policies to the To Be Associated list and click <b>Next</b>.</li> </ol>
Proxy Netmaps	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the proxy netmap that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the proxy netmaps from the available list.</li> <li>3. Use the arrows to move the proxy netmaps to the To Be Associated list and click <b>Next</b>.</li> </ol>
Perimeter Servers	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the Perimeter Server that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the Perimeter Servers from the available list.</li> <li>3. Use the arrows to move the Perimeter Servers to the To Be Associated list and click <b>Next</b>.</li> </ol>
Report Configurations	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the report configuration that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the report configurations from the available list.</li> <li>3. Use the arrows to move the report configurations to the To Be Associated list and click <b>Next</b>.</li> </ol>

If You Select	Complete These Steps
Schedules	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the schedule that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the schedules from the available list.</li> <li>3. Use the arrows to move the schedules to the To Be Associated list and click <b>Next</b>.</li> </ol>
XML Schemas	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the XML Schema that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the XML schema from the available list.</li> <li>3. Use the arrows to move the schema to the To Be Associated list and click <b>Next</b>.</li> </ol>
Security Tokens	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the security token that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the security tokens from the available list.</li> <li>3. Use the arrows to move the security tokens to the To Be Associated list and click <b>Next</b>.</li> </ol>
Service Configurations	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the service configuration that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the service configuration from the available list.</li> <li>3. Use the arrows to move the service configuration to the To Be Associated list and click <b>Next</b>.</li> </ol>
SSH Resources	<ol style="list-style-type: none"> <li>1. From the <b>SSH Resources</b> list, select the SSH resources you want to associate with this resource tag.</li> <li>2. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the SSH resource that you want to filter for and click the Filter button to the right of the field.</li> <li>3. In each resource page for each SSH resource chosen, select the resources from the available list.</li> <li>4. Use the arrows to move the resources to the To Be Associated list and click <b>Next</b>.</li> </ol>
SWIFTNet Routing Rules	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the SWIFTNet routing rule that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the SWIFTNet routing rules from the available list.</li> <li>3. Use the arrows to move the SWIFTNet routing rules to the To Be Associated list and click <b>Next</b>.</li> </ol>

If You Select	Complete These Steps
Trading Partner Data	<ol style="list-style-type: none"> <li>1. From the <b>Partner Resources</b> list, select the partner resources you want to associate with this resource tag.</li> <li>2. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the trading partner resource that you want to filter for and click the Filter button to the right of the field.</li> <li>3. In each resource page for each partner resource chosen, select the resources from the available list.</li> <li>4. Use the arrows to move the resources to the To Be Associated list and click <b>Next</b>.</li> </ol>
Web Resources	<ol style="list-style-type: none"> <li>1. From the <b>Web Resources</b> list, select the Web resources you want to associate with this resource tag.</li> <li>2. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the Web resource that you want to filter for and click the Filter button to the right of the field.</li> <li>3. In each resource page for each Web resource chosen, select the resources from the available list.</li> <li>4. Use the arrows to move the resources to the To Be Associated list and click <b>Next</b>.</li> </ol>
Web Services	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the Web Service that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the Web services from the available list.</li> <li>3. Use the arrows to move the services to the To Be Associated list and click <b>Next</b>.</li> </ol>
WSDL	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the WSDL that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the WSDLs from the available list.</li> <li>3. Use the arrows to move the WSDLs to the To Be Associated list and click <b>Next</b>.</li> </ol>
XSLT	<ol style="list-style-type: none"> <li>1. Under Filter Data in the <b>By Name</b> field, type either a portion of the name or the entire name of the XSLT style sheet that you want to filter for and click the Filter button to the right of the field.</li> <li>2. Select the XSLT style sheets from the available list.</li> <li>3. Use the arrows to move the XSLT style sheets to the To Be Associated list and click <b>Next</b>.</li> </ol>

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## Copy a Resource Tag

You can save time when creating a resource tag by copying a similar previously saved tag and modifying it to suit your needs.

To create a copy of a resource tag:

1. From the **Deployment** menu, select **Resource Manager > Resource Tags**.
2. Using either the Search or List option to locate the resource tag you want to copy.
3. Next to the resource tag you want to copy, click **copy**.
4. Type a new unique name for the resource tag (required). Do not use special characters.
5. Type a new description (do not use special characters) and click **Next**.
6. In the **Resource Types** list, make any changes to the resource type selections you want to associate with this resource tag and click **Next**.
7. Associate the resource type with the resource tag.

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## Edit a Resource Tag

You can edit previously saved resource tags to add or remove associated resources.

To edit a resource tag:

1. From the **Deployment** menu, select **Resource Manager > Resource Tags**.
2. Using the Search or List options to locate the resource tag to edit.
3. Next to the resource tag you want to edit, click **edit**.
4. Modify the parameters of the resource tag as needed, clicking **Next** to proceed through the wizard.

**Note:** You cannot modify the Resource Tag value. To create a tag having the same properties but a different name, make a copy of the resource tag, which involves assigning a new name. For more information, see *Copy a Resource Tag*.

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## Search for a Resource Tag

Search for a research tag when you need to review, modify or delete it.

To search for a resource tag:

1. From the **Deployment** menu, select **Resource Manager > Resource Tags**.
2. Complete one of the following actions:
  - ◆ Under Search in the **Resource Tag** field, type either a portion of the name or the entire name of the resource tag you are searching for, and click **Go!** to list all of the resource tags containing the full or partial name you typed.
  - ◆ Under List in the **Alphabetically** field, select **ALL** or the letter that begins the name of the resource tag you are searching for. Selecting ALL lists all of the resource tags in Gentran Integration Suite. Click **Go!**
3. Depending on your task, complete one of the following actions:
  - ◆ To change resource tag settings, click **edit** next to the appropriate tag. For more information, see *Edit a Resource Tag*.
  - ◆ To create a copy of a resource tag, click **copy** next to the appropriate tag. For more information, see *Copy a Resource Tag*.
  - ◆ To delete a resource tag, click **delete** next to the appropriate tag. For more information, see *Delete a Resource Tag*.



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## Delete a Resource Tag

To delete a resource tag:

1. From the **Deployment** menu, select **Resource Manager > Resource Tags**.
2. Use either the Search or List option to locate the tag to delete.
3. Next to the resource tag to delete, click **delete**.
4. Verify that the resource tag information matches the resource tag you want to delete. Do you want to delete the resource tag?
  - ◆ If Yes, click **Delete**.
  - ◆ If No, click **Cancel**.

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## About Importing and Exporting Resources

The Gentran Integration Suite Import/Export feature enables you to save time and increase the accuracy of duplicating supported resources on different Gentran Integration Suite environments that are set up for unique purposes. Specifically, the Import and Export options enable you to:

- ◆ Move resources from a Gentran Integration Suite test environment into a production environment.
- ◆ Move resources from one Gentran Integration Suite system to another.
- ◆ Import resources that you have converted from another Gentran format, such as Gentran:Server or Gentran:Basic.

You cannot use the Import and Export options to import or export .war files. For a list of resources you can import and export, see Resources List.

**Note:** You may have to manually complete the configurations for some resources if:

- ◆ Import resources are from a version of Gentran Integration Suite older than what you currently have installed
- ◆ Import resources are being moved from a higher patch level to a lower patch level.

## About Exporting Resources

In order to be imported into another system, resources must be in the proper format. The Gentran Integration Suite export feature copies and converts a group of resources that you specify into a file in one of the following formats importable formats, according to your needs:

- ◆ XML – Enables you to transfer data or resources between two existing systems.
- ◆ Installable bundle – Optionally enables you to load the data during a Gentran Integration Suite installation on a new system.

### Advanced Export Features

When you perform an export, you select one or more types of resources to export (such as business processes or xml schemas). Then, the export wizard provides options for specifying by version and resource tag which copies of each selected resource you want to export. The version-related options are:

- ◆ Standard export – For your selected resources, the export copies non-versioned resources and the default version of versioned resources.
- ◆ Advanced export – For your selected resources, the export copies non-versioned resources and, for versioned resources, enables you to choose either to export only default versions or all versions.

In a given export procedure, you can export resources that are associated with a particular resource tag or choose to export resources independently of any association with a tag. Resources associated with a tag are not tied to the tag; you can export them without selecting the associated tag.

## About Importing Resources

When you import resources, the process converts an XML file or installable bundle into Gentran Integration Suite resources format. Generally, the import process replaces non-versioned resources with the new data and appends new versions of a resource to existing versioned resources, although you can choose whether to overwrite existing data as part of the import process selections.

Remember that you must manually update imported resources that contain hard-coded, computer-specific information. For example, system paths in scripts must be manually changed to use the new path after importing resources to their new location.

### Backup Feature Preserves Resources in Pre-Import State

During import, Gentran Integration Suite creates a backup .xml file of resources as they existed prior to import. This enables you to overwrite existing data without fear of losing the data permanently. Using the backup file, you can import the old data back into Gentran Integration Suite if needed.

The backup data is generated as follows:

- ◆ For any resource objects you import that have a pre-existing copy saved in Gentran Integration Suite, the backup file preserves a copy of the data as it existed prior to the import procedure. For example, if you import three updated copies of existing envelopes, the file will contain a record of those three envelopes before the update.
- ◆ No backup data is generated for any resources you import that are all-new to Gentran Integration Suite.
- ◆ The file is named backup.xml by default. You can change the name of the backup file when you download it, so that you do not overwrite an existing backup file and so that you can give it a meaningful name for future reference.

### Overwriting or Preserving Existing Resources

When you import resource data for resources that have prior copies previously saved in Gentran Integration Suite, you use the Update Objects option to indicate whether or not you want to overwrite existing data.

When you opt to preserve existing resources rather than overwrite them with the imported data, the following processing takes place for versioned and non-versioned resources:

- ◆ Non-versioned resources – When a record already exists, nothing is imported. The import process does not change existing records.
- ◆ Versioned resources – The import does not change any versions currently in the system, and adds only new versions.

When you opt to update the resource objects, overwriting them with the imported data, the following processing takes place for versioned and non-versioned resources:

- ◆ Non-versioned resources – The import replaces the existing records.
- ◆ Versioned resources – The import appends new versions to the list of previously saved versions, incrementing by one.

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## Export Resources

Use the export procedure appropriate to your needs:

- ◆ *Export Resources Associated With a Resource Tag*
- ◆ *Export Resources Without a Resource Tag*

For field descriptions, see *Export Parameters*.

### Export Resources Associated With a Resource Tag

To export resources associated with a resource tag:

1. From the **Administration** menu, select **Deployment > Resource Manager > Import/Export**.
2. Next to **Export Resources**, click **Go!**
3. Indicate the type of format to export to, **XML Document** or **Install Bundle**, and click **Next**.
4. Select **Yes** to export resources associated with a tag, select the appropriate resource tag, and click **Next**.
5. Does the system require a passphrase?
  - ◆ If Yes, enter the passphrase (the password you use when you log in to Gentran Integration Suite).
  - ◆ If No, the passphrase page does not display; proceed to the next step.
6. Are private certificates included in the resources associated with this tag?
  - ◆ If Yes, indicate whether to export private certificates that are associated with the resource tag.
  - ◆ If No, this page does not display; proceed to the next step.
7. Click **Finish** to create the export file.
8. When the message, *The system update completed successfully* displays:
  - ◆ Click **View Export Report** to see status information to confirm the export of each resource associated with the selected resource tag, if desired.
  - ◆ Click **Download Export data** to download the export file to a hard drive or disk where you will store it.
9. In the **File Download** dialog box, click **Save**.
10. In the **Save As** dialog box, select the location to which to save the file, and click **Save**.

### Export Resources Without a Resource Tag

To export resources without a resource tag:

1. From the **Deployment** menu, select **Resource Manager > Import/Export**.
2. On the Import/Export Resources page, next to **Export Resources**, click **Go!**
3. Indicate the type of format to export to, **XML Document** or **Install Bundle**, and click **Next**.
4. Select **No** to indicate that you do not want to export resources associated with a tag.

5. On the Export Type page, indicate the type of export to perform for resources that have multiple saved versions in the system. Options are:
  - ◆ **Standard** – Export the default version of selected versioned resources.
  - ◆ **Advanced** – Enables you to choose, through wizard selections, whether to export only default versions or all versions of selected resources.
6. Select the types of resources you want to export and click **Next**.
7. For each resource type you selected to export, the wizard displays a selection page (for example, if you selected Business Processes, you can now select the specific business process model definitions to export). Complete the following tasks:
  - ◆ Select the appropriate resource(s) from the **Available** box.
  - ◆ If you selected Advanced export option and you want to export all versions of each resource you select on this page, select **Export All Versions**, located below the **Available** pane (this option does not display if you selected the Standard export option).
  - ◆ Click **Next**.

If you selected Standard export option, the system automatically exports only the default version of the resources you select here.
8. Did you select more than one resource type in step 6?
  - ◆ If Yes, repeat step 7 for each page related to the resource types you selected.
  - ◆ If No, proceed to the next step.
9. Click **Finish** to create the export file.
10. When the message, *The system update completed successfully* displays:
  - ◆ Click **View Export Report** to see status information to confirm the export of each resource associated with the selected resource tag, if desired.
  - ◆ Click **Download Export data** to download the export file to a hard drive or disk where you will store it.
11. In the **File Download** dialog box, click **Save**.
12. In the **Save As** dialog box, select the location to which to save the file, and click **Save**.

---

## Import Resources

**Note:** When you import service configuration resources exported from a version 3.1 or earlier installation of Gentran Integration Suite using the Import option in the interface, any service configuration parameters that have been encrypted do not import. To import these resources and their encrypted parameters, use the command line import tool, `install_services.sh`, located at `/install_dir/bin`.

To import resources:

1. From the **Administration** menu, select **Deployment > Resource Manager > Import/Export**.
2. On the Import/Export page, next to **Import Resources**, click **Go!**
3. Type the path and name of the file to import, or use **Browse** to locate and select it, and click **Next**.  
If the import returns a message that the file contains errors, you can either select the file and click **Next** again to continue the import, or click **Cancel** to stop the import process.
4. Do you want to create a resource tag for the data being imported?
  - ◆ If Yes, type a name and description for the new resource tag and click **Next**.
  - ◆ If No, click **Next**.
5. Indicate whether you want to update objects that may already exist in Gentran Integration Suite with objects from the import, and click **Next**.  
For details about how updating objects works, see *Overwriting or Preserving Existing Resources*
6. For each type of resource included in the import file, the wizard displays a corresponding resource selection page (for example, if you are importing business process model definitions, the BP Definitions page displays, enabling you to specify which of the definitions in the import file you want to import). From the selection pages, select resources to import for each resource type and click **Next**.  
**Note:** Some resource objects may require you to type the passphrase (the password you use to log in to Gentran Integration Suite) before completing the import.
7. Does the import file contain more than one resource type?
  - ◆ If Yes, repeat step 6 for each resource type.
  - ◆ If No, proceed to the next step.
8. To update Gentran Integration Suite with the imported data, click **Finish**.  
This process may take several minutes, depending on the volume of resources being imported.
9. When the message, *The system update completed successfully* displays, click **View Import Report** to see the import report.
10. Does the option to download data that failed to import display?
  - ◆ If Yes, errors occurred during import. To view the XML file containing the names of objects that did not import, click **Download** next to **Data which failed to Import**.
  - ◆ If No, proceed to the next step.
11. Do you want to create a backup file containing the related resource data as it existed prior to your import procedure (this is recommended)?

- ◆ If Yes, next to **Data in SI before Import**, click **Download**.
- ◆ If No, the import is complete. Skip the next step.

**Caution:** Completing this step is very important. If you do not download the backup file to a hard drive or disk, you will lose your record of the data as it existed prior to import.

12. In the **Save As** dialog box, change the default filename from backup.xml to a unique, meaningful name for this backup, and then click **Save**.

For field descriptions, see *Import Parameters*.

---

## Locked Resources

In Gentran Integration Suite, when a resource is in use, the system locks the resource to prevent other users or resources from accessing it. When the resource becomes free, Gentran Integration Suite unlocks it. With the necessary permission, users can unlock resources manually as well. A resource is locked when it is checked out of Gentran Integration Suite, being edited from within Gentran Integration Suite, or currently in use for processing.

You can use the Lock Manager to monitor and manage resources that are currently locked and in use, whether due to another user accessing a resource for editing or because Gentran Integration Suite is using a resource to perform an operation during processing. For example, you can:

- ◆ Search for locked resources by user name, item name, time range, or any combination of these
- ◆ View a list of all locked resources
- ◆ Unlock locked resources, if you have permission to do so

When a checked-out resource is checked back in to Gentran Integration Suite or edited and saved from within Gentran Integration Suite, the system unlocks the resource. In general, locks expire according to configuration settings defined during the installation of Gentran Integration Suite.



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## Search for Locked Resources

To search for locked resources in Gentran Integration Suite:

1. From the **Administration** menu, select **Operations > Lock Manager**.
2. Enter any combination of criteria to refine your search, using the following fields as needed, and click **Go!**:

---

Field or Selection	Description
User Name	Returns user names of users currently owning a lock on any locked resources containing the specified character or string.
Item Name	Returns resource names for any locked resources containing the specified character or string.
Start Date and time	Specify the date and time to start a range in which to search for locked resources. The search returns resources locked within the specified start and end dates and times. <b>Note:</b> The start dates and times displayed by default depend on whether Gentran Integration Suite currently has currently locked resources, as follows: <ul style="list-style-type: none"><li>◆ If Gentran Integration Suite has no currently locked resources, the Start Date fields display the current system date and time minus one minute, and the End Date fields display the current system date and time plus one minute.</li><li>◆ If resources are currently locked in Gentran Integration Suite, the Start Date fields display the date and time the earliest resource was locked, and the End Date fields display the date and time the resource with the latest start date and time was locked.</li></ul>
End Date and time	Specify the date and time to end a range in which to search for locked resources. The search returns resources locked within the specified start and end dates and times. See <i>Start Date and time</i> on page 25 for additional details.
List Alphabetically	Select either <b>ALL</b> to display a list of all locked resources, or a letter to display a list of all locked resources beginning with the selected letter. ALL is the default value.
List By	Select either <b>User Name</b> or <b>Item Name</b> to display a list of all locked resources according to your selection in the List Alphabetically field and this field.

---

3. In the Lock Manager results page, review the information for the listed resources. This information is displayed as follows:
  - ◆ Automatically refresh every 60 seconds – This is the default; to turn off the auto-refresh, remove the check
  - ◆ Lock – Remove the check if you are certain that it is safe to unlock the resource
  - ◆ User Name – Name of the Gentran Integration Suite user
  - ◆ Item Name – Name of the locked item
  - ◆ Type – Type of resource that is locked (such as business process, map, or schema)
  - ◆ Time Stamp – Date and time the resource was locked

- ◆ Expiration Time – Date and time the resource lock expired or will expire (also indicates how much time is left until the lock expires)
- ◆ Clear On Startup – Indicates whether the lock will be released if Gentran Integration Suite is shut down and restarted

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## Unlock Locked Resources

To unlock locked resources in Gentran Integration Suite:

1. From the **Administration** menu, select **Operations > Lock Manager**.
2. Use the search or list option to locate the locked resource you want to unlock.
3. In the Lock Manager search results page, under Lock, clear the check box next to the resource you want to unlock.
4. Click OK.

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## Import Parameters

### Import File

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Field	Description
File Name	Type the path to the file to import, or browse to select the file.
Passphrase	Password associated with the data being imported. This password was assigned to the data during the procedure to export it and create the file. Required only if the data being imported requires a passphrase.

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### Create Resource Tag

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Field	Description
Tag Name	A unique name for the resource tag you are creating for the data you are importing. Do not use special characters.
Description	A meaningful description for the resource tag you are creating. Do not use special characters.

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### Update Objects

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Selection	Description
Yes	Update the existing objects in the system with the objects being imported. <ul style="list-style-type: none"><li>◆ For non-versioned resources, the import replaces the existing records.</li><li>◆ For versioned resources, the import appends new versions to the list of previously saved versions, incrementing by one.</li></ul>
No	Preserve existing resources. <ul style="list-style-type: none"><li>◆ For non-versioned resources, when a record already exists, nothing is imported. The import process does not change existing records.</li><li>◆ For versioned resources, the import does not change any versions currently in the system, and adds only new versions.</li></ul>

---

### Resource Selection Pages

For each type of resource included in the import file, the wizard displays a corresponding resource selection page (for example, if you are importing business process model definitions, the BP Definitions resource selection page displays, enabling you to specify which of the definitions in the import file you want to import).

Select the resources to import from the **Available** box and move them to the **To Be Imported** box.

**Note:** On the selection page for trading partner envelopes (TP Envelopes page), an additional option enables you to indicate whether or not to keep existing control numbers with the envelopes you are importing.

## Mailbox Metadata

Selection	Description
Select All	Import all of the mailbox metadata contained in the import file. A number in parenthesis indicates the number of selections available.
Filter by name	Display the list of available mailbox metadata selections so that you can filter by mailbox name to select what to import. <b>Available Mailboxes</b> and <b>Selected Mailboxes</b> fields display when you select this option. Select the resources to import from the <b>Available Mailboxes</b> box and move them to the <b>Selected Mailboxes</b> box.

## TP Identities: Certificates

Selection	Description
Yes	Import private certificates.
No	Do not import private certificates.

## Security

Field	Description
Passphrase	Password associated with the data being imported. This password was assigned to the data during the procedure to export it and create the file.

## Confirm

This page enables you to verify that the appropriate resources are selected for import.

## Finish

- ◆ View the Import report to verify that the selected resources were copied successfully into the system.
- ◆ In the event of errors, view an XML file containing the names of objects that did not import.
- ◆ Download a backup file to save a record of the resources as they existed prior to the import in another location.

---

## Export Parameters

### Output Format Type

Selection	Description
XML Document	Export generates an .xml file you can use to transfer data or resources between two existing systems.
Install Bundle	Export generates a file you can optionally use to load the exported data during a Gentran Integration Suite installation on a new system.

### Resource Group

Do you wish to export resources based on a tag name?

Selection	Description
Yes	Exports all resources associated with resource tag name selected in the selection box.
No	Exports only resources selected in the Export wizard, independent of any resource tag associations.
(selection box)	Lists all previously created resource tags. Select from the list.

### Security

Field	Description
Passphrase	<p>Password you want to assign to the set of data you are exporting. A user importing the data must know this password. Required for the following resources:</p> <ul style="list-style-type: none"><li>◆ Trading Partner identities</li><li>◆ Trading Partner envelopes</li><li>◆ PGP profiles</li><li>◆ Service configurations</li><li>◆ Communities</li><li>◆ System Digital Certificates</li><li>◆ Certain SSH resources: Host identity keys, User identity keys, and SSH remote profiles</li><li>◆ Web services</li><li>◆ Security tokens</li><li>◆ Proxy netmaps</li></ul>

Field	Description
Confirm Passphrase	Type the password again.

## Confirm

This page enables you to verify that the appropriate resources are selected for export.

## Export Type

Selection	Description
Standard	The export includes non-versioned selected resources and the default version of any selected versioned resources.
Advanced	The export includes non-versioned selected resources and, for any versioned resources you select, enables you to choose either to export only the default versions or all versions.

## Select Resources

Select the type of resources you want to export. For each resource type you select here, the wizard will enable you to indicate the particular resources to export.

## Accounts

Selection	Description
Groups	Export user groups.
Users	Export user accounts.
Permissions	Export defined user permissions.

## Resource Selection Pages

After you have indicated the types of resources to export, these pages enable you to select the specific resources to export for each selected resource type. Select the resources to export from the **Available** box and move them to the **To Be Exported** box.

Depending on the resource type or your export option (Standard or Advanced), the following selections may be available on resource selection pages:

Selection	Description
Export Dependent Records	Select <b>Yes</b> or <b>No</b> to indicate whether you want the export to include any records upon which the selected resource is dependent.
Export All Versions	Export all versions of the resources selected on this page (not only the default versions). This option displays only if you are using the Advanced export option and the selected resource is a versioned resource.

## Mailboxes

Select one or more types of mailbox resources to export (metadata, virtual roots, or routing rules).

### Mailbox Metadata

Selection	Description
Select All	Export all of the mailbox metadata saved in the system. A number in parenthesis indicates the number of selections available.
Filter by name	Display the list of available mailbox metadata selections so that you can filter by mailbox name to select what to export. <b>Available Mailboxes</b> and <b>Selected Mailboxes</b> fields display when you select this option. Select the resources to export from the <b>Available Mailboxes</b> box and move them to the <b>Selected Mailboxes</b> box. <b>Note:</b> When mailbox details are exported, all the associated users are also exported, even if they are not chosen to be exported.

### Select TP Objects

Select one or more trading partner resource objects you want to export (code lists, control numbers, envelopes, contracts, identities, or packagings).

### Select Digital Certificates

Select one or more types of digital certificates to export (CA, trusted, or system).

### Select ebXML Objects

Select one or more ebXML objects to export (BPSS, BPSS Extension, CPA).



## Select SSH Resources

Select one or more SSH resources to export (Authorized User Keys, Host Identity Keys/User Identity Keys, or Known Host Keys, SSH Remote Profiles).

## Select Web Resources

Select one or more Web resources to export (HTML files, Images, JavaScript files, JSP files, Other files, Property files, Stylesheets, or XML files).

## Finish

- ◆ View the Export report to verify that the selected resources were copied successfully into the export file.
- ◆ Download the Export Data file to another location for storage (you can import it later as needed).

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