

IBM InfoSphere Optim  
Version 9 Release 1

*Using IBM InfoSphere Optim Manager*





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Version 9 Release 1

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**Note**

Before using this information and the product it supports, read the information in "Notices" on page 29.

**Version 9 Release 1**

This edition applies to version 9, release 1, modification 0 of IBM Optim solution components and to all subsequent releases and modifications until otherwise indicated in new editions.

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## About this publication

This document describes how to configure and use IBM InfoSphere® Optim Manager to run and manage test- and production-level services.





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## Chapter 1. InfoSphere Optim solution components

Use IBM® InfoSphere Optim™ solution components to develop, configure, and run InfoSphere Optim services.

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### InfoSphere Optim Designer

IBM InfoSphere Optim Designer is an Eclipse-based development environment that can be used to develop and test data management services. InfoSphere Optim Designer is also known as the *designer*.

The designer can be installed only on Microsoft Windows workstations.

The designer must be installed with IBM InfoSphere Optim Runtime Services to work. The designer can be installed with IBM InfoSphere Data Architect in a "shell sharing" configuration, but the designer does not require InfoSphere Data Architect.

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### InfoSphere Optim Manager

IBM InfoSphere Optim Manager is a web application that you can use to configure, manage, run, and monitor data management services. InfoSphere Optim Manager is also known as the *manager*.

You can access and use the manager to run services from the designer.

The manager can also be deployed to a Java™ EE-compliant application server so that users do not need to install the designer to test and run services. InfoSphere Optim components are delivered with a version of WebSphere® Application Server Community Edition that you can use for the connection manager and the manager. You do not need to deploy the manager to an application server to use the manager from the designer.

InfoSphere Optim Manager is installed by IBM Installation Manager as part of the IBM InfoSphere Optim Web Applications package.

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### InfoSphere Optim Runtime Services

IBM InfoSphere Optim Runtime Services is the component that contains the server and the **pr0cmd** command-line interface. When installed on a Microsoft Windows computer, InfoSphere Optim Runtime Services also contains an alternative interface that can be used to develop and run services. InfoSphere Optim Runtime Services is also known as *runtime services*.

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#### Server

The *server* is the component that processes service requests. The server receives service requests, reads data from data sources, and writes data to data sources according to the instructions found in each service request.

The server is part of IBM InfoSphere Optim Runtime Services. For fast performance, install InfoSphere Optim Runtime Services on a computer that is near to the data sources that you are processing.

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#### Optim Service Interface

Optim Service Interface is a web application that can be used by other applications to run, monitor, and manage services. Optim Service Interface is also known as the *service interface*.

The service interface accepts HTTP requests and XML request payloads where applicable. The service interface processes the request and returns an HTTP response code and output document where applicable.

Optim Service Interface is installed by IBM Installation Manager as part of the IBM InfoSphere Optim Web Applications package.

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## InfoSphere Optim Connection Manager

IBM InfoSphere Optim Connection Manager is a web application that stores Optim directory connection information for InfoSphere Optim components. InfoSphere Optim Connection Manager is also known as the *connection manager*.

The connection manager can be deployed to a Java EE-compliant application server. InfoSphere Optim components are delivered with a version of WebSphere Application Server Community Edition that you can use for the connection manager and the manager.

InfoSphere Optim Connection Manager is installed by IBM Installation Manager as part of the IBM InfoSphere Optim Web Applications package.

## How services are run by using the manager and other components

Components must work together to complete a service request successfully.

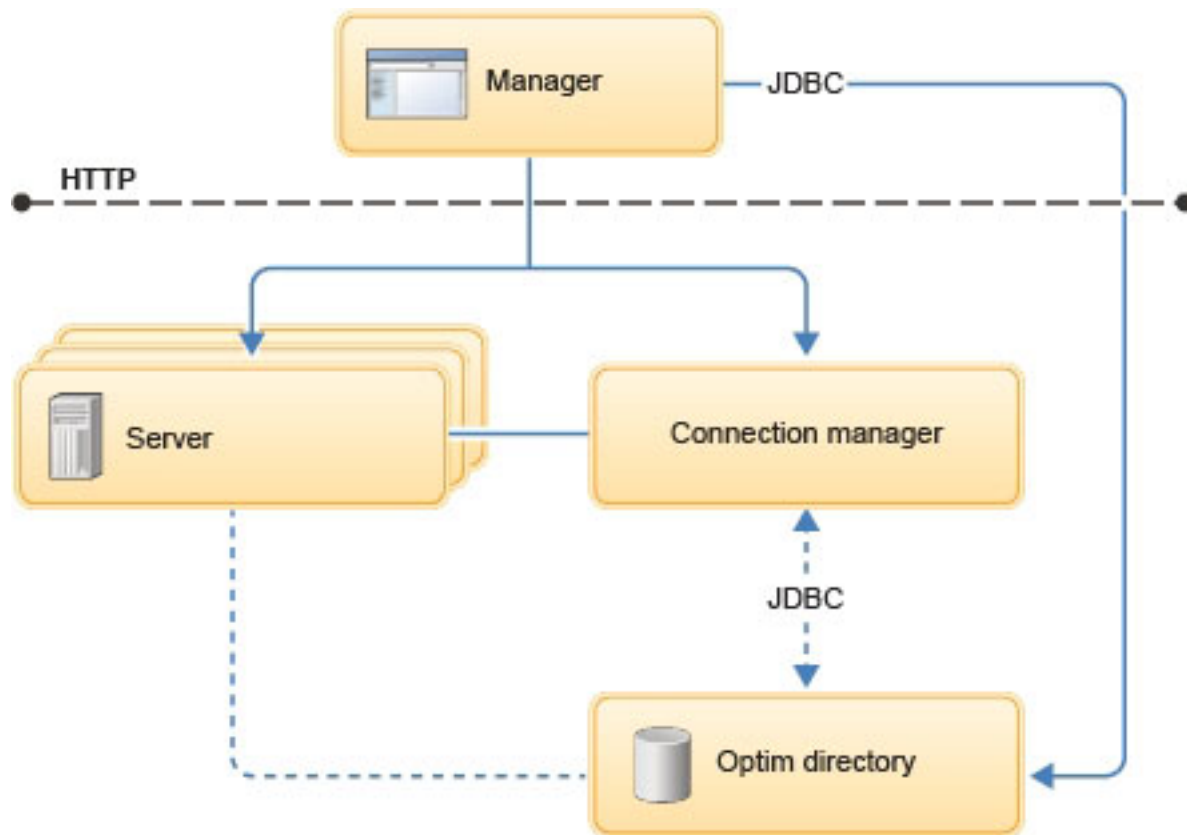


Figure 1. Components running a service

The diagram shows how components work together to run a service:

1. A user accesses the manager by using a browser.
2. The manager verifies the user credentials and connects the user to the latest Optim directory that the user accessed or to the default Optim directory.
3. The user accesses service management in the manager to view a list of services.
4. The manager connects to the Optim directory and retrieves the list of services.
5. The user selects a service to run from the list of services in service management.
6. The manager forwards the service request to the server to which the service is assigned.
7. The server processes the service request. Depending on the type of service, the server might request and receive additional service information from the Optim directory, access data from a data source, read and change files that are stored on the server computer, and write data to a data source.
8. The manager reads the service status from the server computer and updates the Optim directory.
9. A user accesses the manager to determine whether a service completed successfully.
10. The manager reads the service status from the Optim directory and displays the service status to the user.



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## Chapter 2. InfoSphere Optim data objects

IBM InfoSphere Optim solutions use data objects and models for processing and for tracking processing status. These data objects are stored in an Optim directory, which is stored in a database.

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### Optim directory

An *Optim directory* is a set of database tables in which Optim stores the data objects that Optim needs for processing and for tracking processing status. An Optim directory can be used by multiple users or even by an entire enterprise.

Immediately after you install your Optim solution, you use the configuration program to create a Optim directory or to connect to an existing Optim directory.

Typically, a site uses one shared Optim directory. However, you can create additional Optim directory instances as needed.

### Objects stored in an Optim directory

The following types of objects can be stored in an Optim directory:

- Object Definitions
  - Data source aliases
  - Access definitions
  - Table maps
  - Column maps and column map procedures
  - Primary keys
  - Relationships
- Processing Definitions
  - Archive requests
  - Compare requests
  - Convert requests
  - Delete requests
  - Edit definitions
  - Extract requests
  - Insert requests
  - Load requests
  - Restore requests
  - Report requests
- Utility definitions
  - Calendar definitions
  - Currency definitions
  - Storage profiles
- Security definitions
  - Access control domains
  - Access control lists
  - File access definitions

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## Data store alias

A *data store alias* is a short name used to identify the parameters required to connect to a specific database.

A data store alias name is used as a high-order qualifier for an object or table name, providing information Optim needs to access the appropriate database. A data store alias is needed anytime a database object is referenced. For example, a data store alias name is used to qualify the name of a database table that is referenced in an access definition.

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## Access definition

An *access definition* is a declaration that identifies the start table, related tables, relationships, and selection criteria that define the data to be processed.

An access definition identifies the tables, relationship traversal, and selection criteria for the data that you want to process. An access definition might also identify tables from which archived data is deleted. It also provides parameters for indexes and archive actions: user-defined SQL statements run at predefined points in an archive or restore process. You can select a named access definition or create an access definition for a single archive request.

Use an access definition to complete the following tasks:

- Identify the tables from which data is archived in the archive process. You can insert the name of a single table and request that Optim reads and provides the names of all related tables. One table is identified as the start table, or table from which data is first archived.
- Identify tables from which data is deleted after archiving. You can set an option to review and change your selections before data is deleted.
- Select relationships to be traversed and the direction of traversal when archiving the data. You can use relationships defined to the database and create relationships in the Optim directory to replicate the relationships that are managed by your applications.
- Define criteria for the set of related rows to be archived. The criteria can be defined in either of the following ways:
  - Selection criteria based on the age of the data or values in one or more columns.
  - A manually selected list of start table rows (Point and Shoot).
- Set up indexes to be created when data is archived.
- Establish archive actions to be run when data is archived or restored.
- Review how Optim traverses the database to ensure that the correct data is archived (by using the show steps function).

---

## Table map

A *table map* is a map that defines specifications for correlating source and destination tables of compatible data.

A table map identifies and matches two tables or sets of tables in an insert or load process that is used in a restore process. A table map can also exclude one or more tables from processing.

A table map can also reference a column map. Reference a column map to map together columns with different names, to transform source column values before insertion, and to bypass processing for specified columns.

A table map is required for an insert, load, or restore process.

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## Column map

A *column map* is a map that defines the specifications for mapping columns of compatible data between source and destination tables.

A table map can reference a column map to complete the following tasks:

- Map a source column to a destination column that has a different name
- Transform source column values before inserting them into destination columns
- Bypass processing for specific columns

A Column Map Procedure facilitates data transformations in a process that are beyond the scope of Column Map functions.

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## Extract file

An *extract file* is a file that contains a set of related rows extracted from one or more tables, saved in proprietary format. An extract file can contain data, object definitions, or both.

Extract files use the .xf file extension by default. Extract files are stored in the data directory that is specified in Personal Options.

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## Control file

A *control file* is an automatically generated file that records process specifications and the success or failure of processing.

Control files use the .cf file extension by default.

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## Compare file

A *compare file* is a file that contains the full results of an InfoSphere Optim compare request (that is, a comparison of two data sources). A compare file is not a report, but a compare file can be used to generate multiple reports with different parameters.

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## Service

A *service* is a unit of work accomplished by an interaction between computing devices. InfoSphere Optim data management services can be used to archive, move, compare, edit, and transform complete business objects in the data sources at your enterprise.

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## Service input

Each InfoSphere Optim data management service can use variable inputs. Variable inputs have default values that can be changed before you run the service. You can reset the inputs to their default values at any time.

Service inputs are also known as *overrides*.

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## Service set

A *service set* is an ordered list of services. When you run a service set, the manager runs each service in the service set, one at a time, in the specified order. Create a service set to simplify the running of related services in a specific sequence.

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## Group of services

A *group of services* is a collection of services that are to be viewed, run, or scheduled only by specific users. If a service is in a group of services, a user can view or run the service only if the user is granted access to the group of services.

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## Work order

A *work order* is a request for a service to be created. For example, a work order can be created to request a service that creates test databases.

In the manager, a work order is typically created by a requestor and fulfilled by a designer. After fulfilling the work order, the designer either runs the resulting service or returns the work order to the requestor so that the requestor can run the service.

You can also use a workflow that includes a reviewer between the requestor and the designer. The reviewer can review the work order to ensure that the request is made for a valid business reason.



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## Chapter 3. Running test- or production-level services

Use IBM InfoSphere Optim Manager with other InfoSphere Optim solution components to run test- or production-level services that are developed with IBM InfoSphere Optim Designer.

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### Starting the manager on an application server

To use the manager on an application server, you must first start the manager on its application server. After the manager is started on the application server, you can access the manager at any time.

Before you can start the manager, you must install the manager. You must also configure the manager and the components that the manager uses to run services. For example, you must deploy the manager WAR file to the application server.

To start the manager on an application server:

1. Start the application server. If the application server is set to start the manager web application automatically, then the manager is started immediately after the application server. If you deployed the manager to the version of WebSphere Application Server Community Edition that is delivered with the manager, then complete the following step. In this step, *shared\_installation\_directory* is the installation directory that you specified for the manager.
  - Microsoft Windows computers: Click **Start > All Programs > IBM InfoSphere > Optim > Start WAS-CE**, or run the script *shared\_installation\_directory\WebSphere\AppServerCommunityEdition\bin\startup.bat*.
  - Linux or UNIX computers: Run the script *shared\_installation\_directory/WebSphere/AppServerCommunityEdition/bin/startup.sh*.
2. If necessary, start the manager web application by using the application server console. If you deployed the manager to the version of WebSphere Application Server Community Edition that is delivered with the manager, then complete the following steps:
  - a. Use a web browser to access and sign into the Administrative Console. The default location is at <http://hostname:port/console/>, where *hostname* is the host name or IP address of the WebSphere Application Server Community Edition computer and *port* is the port number. The default port number is 8080. Use user ID system and password manager to access the Administrative Console.
  - b. Click **Web App WARs**.
  - c. Click **Start** for the component with an URL of /optim.

To automate the starting of the manager after you restart the computer, configure the application server as a Windows service or Linux or UNIX daemon.

### Accessing the manager on an application server

Use a web browser to access the manager on an application server.

To access the manager on an application server, go to one of the following locations, where *hostname* and *port* are the host name and port of the application server on which the manager is deployed.

- For the default, full-color version of the manager, use <http://hostname:port/optim/console>.
- For a high-contrast version of the manager that uses black text on a white background, use <http://hostname:port/optim/console#contrast=bw>.
- For a high-contrast version of the manager that uses white text on a black background, use <http://hostname:port/optim/console#contrast=wb>.

If you deploy the manager to the version of WebSphere Application Server Community Edition that is delivered with the manager, then the default port is 8443. Your browser might warn you of a problem with the website's security certificate. This is expected if you use SSL to access a web application that uses a self-signed certificate. Choose to continue to the website.

The first time that an administrator user accesses the manager, the administrator is prompted to select a connection manager and a default Optim directory. An administrator must select a connection manager before any other user can use the manager.

If you cannot access the manager, ensure that the following statements are true.

- The manager is started on the application server on which the manager is deployed.
- You can access the application server on which the manager is deployed from your computer.
- Your web browser is supported by the manager and uses a supported version of the Adobe Flash Player plug-in.

Bookmark the location of the manager for future access.

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## Configuring the manager

To run services in the manager, an administrator must first install and start the components that are used to run these services. The administrator can then connect the manager with the other components and assign servers to services.

Before you begin, you must use a web browser to access and sign into the manager. The default location is at `http://hostname:port/optim/console/`, where *hostname* and *port* are the host name and port of the application server on which the manager is deployed. If you install the version of WebSphere Application Server Community Edition that is delivered with the manager, and you deploy the manager to that copy of WebSphere Application Server Community Edition, then the default port is 8080.

If you cannot access the manager, ensure that the manager is started by the administrator of the application server on which the manager is deployed, that you can access the application server from your computer, and that your web browser is supported by the manager and uses a supported version of the Adobe Flash Player plug-in.

## Changing the connection manager that is used by the manager

The *connection manager* is a web application that stores Optim directory connection information for InfoSphere Optim components. Admin users can change the connection manager that is used by the manager.

Only users with a user role of admin can change the connection manager that is used by the manager.

To change the connection manager that is used by the manager:

1. Access the manager on the application server.
2. Click the link after **Connection Manager**.
3. If the connection manager is not listed in the dialog, click **Add** and complete the requested information. You must enter the host name and port number that is used by the connection manager.
4. Select the default Optim directory and click **OK**. The default Optim directory is the only Optim directory that operator, requester, and reviewer users can access. If an Optim directory is not listed, access the connection manager and ensure that the Optim directory connection is completely configured.

The change takes effect immediately for the user who makes the change. The change takes effect for other users when the other users sign out of the manager and sign back in.

## Changing the default Optim directory for the manager

The default Optim directory for the manager is the only Optim directory that operator, requester, or reviewer users can access.

Only users with a user role of admin can change the default Optim directory for the manager.

To change the default Optim directory for the manager:

1. Access the manager on the application server.
2. Click the link after **Connection Manager**.
3. Select the default Optim directory and click **OK**. If an Optim directory is not listed, ask a user with a user role of admin to access the connection manager and ensure that the Optim directory connection is completely configured.

The change takes effect immediately for the user who makes the change. The change takes effect for other users when the other users sign out of the manager and sign back in.

## Changing the Optim directory to use in the manager

A manager user with a user role of admin or designer can access Optim directories other than the default Optim directory. For example, the default Optim directory contains production-level services. A user with a designer user role can access a different Optim directory with test-level services as needed.

Only users with a user role of admin or designer can change the Optim directory to use.

When a user changes the Optim directory to use in the manager, the change affects only that user. The change is stored on the user account and remains in effect until the user changes to another Optim directory.

To change the Optim directory to use in the manager:

1. Access the manager on the application server.
2. Click the link after **Directory**.
3. Select the Optim directory and click **OK**. If an Optim directory is not listed, ask a user with a user role of admin to access the connection manager and ensure that the Optim directory connection is completely configured.

## Assigning a server to a service

Use the manager to assign a server to a service. You must assign a server to a service before you can run the service. You must assign a server to each service within a service set before you can run the service set.

Only users with a user role of admin or operator can assign a server to a service. To assign a server to a service, a user must have access to the **Service Management** tab.

You can assign a server to a service only if the server is online and is configured to run services. If the server to which you want to assign a service is not available, contact your administrator. The administrator must ensure that the following conditions are met:

- The server must be installed on the server computer.
- The server computer must be running.
- The server must be configured to run as a server.
- The network connections between the server computer, the connection manager computer, and the Optim directory must be unimpeded.

To assign a server to a service by using the manager:

1. Access the manager on the application server.
2. Click **Service Management**.
3. Open the **Services** folder, click the service, and click **Assign Server**.
4. Complete the wizard.

**Related tasks:**

“Accessing the manager on an application server” on page 9

Use a web browser to access the manager on an application server.

## Changing the service inputs

Each service contains default values that the service uses to complete its task (such as the user name and password to access a data source). You can use the manager to change the values that are used by the service. You can also restore the service inputs to their default values.

Only users with a user role of admin, designer, or operator can change the service inputs values. To change the service inputs, a user must have access to the **Service Management** tab. If the service belongs to groups of services, the user must have access to the groups of services to which the service belongs.

To change the service inputs by using the manager:

1. Access the manager on the application server.
2. Click **Service Management**.
3. Open the **Services** folder and click the service.
4. Click **Inputs**, change the input values, and click **Save**. Changes that you make to the service inputs are saved until you change the service inputs again or restore the service to its default values.  
Changes to the service inputs apply both when you run the service alone and when you run a service set that contains the service.

**Related tasks:**

“Accessing the manager on an application server” on page 9

Use a web browser to access the manager on an application server.

“Assigning a server to a service” on page 11

Use the manager to assign a server to a service. You must assign a server to a service before you can run the service. You must assign a server to each service within a service set before you can run the service set.

## Creating a service set

A *service set* is an ordered list of services. When you run a service set, the manager runs each service in the service set, one at a time, in the specified order. Create a service set to run related services with a single action.

Only users with a user role of admin, designer, or operator can create a service set. To create a service set, a user must have access to the **Service Management** tab. If any of the services that are to go into the service set belong to groups of services, the user must have access to the groups of services to which the services belong.

Before you create a service set, ensure that the services that are to be in the service set are tested and stable. Service sets are version-specific. When you run a service set, the manager runs the specific version of each service that was added to the service set. To use a more recent version of a service, you must create another service set that specifies the more recent version of the service.

To create a service set:

1. Access the manager on the application server.
2. Click **Service Management**.

3. Click **Create Service Set**.
4. Use the dialog to enter a name for the service set and to select and order the services within the service set. If you want the service set to continue running subsequent services in the service set after a service fails, clear **Stop if service fails**.
5. When you have selected all of the services that you want to select for the service set, and the services are in the correct order, click **OK**.

## Creating a group of services

A *group of services* is a collection of services that are to be run or scheduled only by specific users. Create groups of services to control which users can run which services.

Only users with a user role of admin can create a group of services.

To create a group of services:

1. Access the manager on the application server.
2. Click **Configuration**.
3. Click **Users and Groups**.
4. Click **Group Management**.
5. Click **Add Group**.
6. Enter a name and description for the group of services and click **OK**.
7. Select the group of services in the list and click **Add Services to Group**.
8. Select a service that you want to add to the group of services and click **OK**. Repeat this step for each service that you want to add to the group.

## Granting user access to a group of services

A *group of services* is a collection of services that are to be run or scheduled only by specific users. If a service is in a group of services, a user can run the service only if the user is granted access to the group of services.

Only users with a user role of admin can grant user access to a group of services.

To grant user access to a group of services:

1. Access the manager on the application server.
2. Click **Configuration**.
3. Click **Users and Groups**.
4. Click **User Management**.
5. Select the user and click **Grant User Access**.
6. Select the group of services and click **OK**.

### Related tasks:

“Creating a group of services”

A *group of services* is a collection of services that are to be run or scheduled only by specific users. Create groups of services to control which users can run which services.

## Creating a user-defined tab in the manager

The manager can have user-defined tabs that contain web applications or web sites.

Only users with a user role of admin can create a user-defined tab in the manager.

To create a user-defined tab in the manager:

1. Access the manager on the application server.

2. Click **Configuration**.
3. Click **Tabs**.
4. Click **Add User-Defined Tab**.
5. Enter the tab label and description that you want to use and the Uniform Resource Locator (URL) for the web application or website, and click **OK**.

## Changing access to tabs in the manager

You can simplify the manager interface by hiding tabs from users who do not have a user role of admin.

Only users with a user role of admin can change access to tabs in the manager.

To change access to tabs in the manager:

1. Access the manager on the application server.
2. Click **Configuration**.
3. Click **Tabs**.
4. For each tab, use **Optim Roles** to select the roles that are to see the tab.

The changes take effect when users sign out of the manager.

### Related tasks:

“Creating a user-defined tab in the manager” on page 13

The manager can have user-defined tabs that contain web applications or web sites.

## Changing the work order workflow

The default work order workflow involves a test analyst, a business analyst, and a designer. The test analyst requests a service, the business analyst reviews and approves or denies the request, and the designer fills or rejects the request. You can change the workflow so that the test analyst sends requests directly to the designer without a business analyst review.

Only users with a user role of admin can change the work order workflow.

You can change the workflow to exclude the business analyst review only if there are no work orders that have states of **Pending Review** or **Denied by Reviewer**.

You can change the workflow to include the business analyst review at any time, but existing work orders are not affected by the workflow change.

To change the work order workflow by using the manager:

1. Access the manager on the application server.
2. Click **Configuration**.
3. Click **Work Orders** and review the workflow diagram, which illustrates the current workflow.
4. Click **Exclude Reviewer Actions** to change the workflow so that the test analyst sends requests directly to the designer without a business analyst review. Click **Include Reviewer Actions** to include a business analyst review in your workflow again.

## Enabling email notification for work order changes

You can configure the manager so that the manager sends email notifications whenever there is a change in the state of a work order. For example, when a designer associates a service with a work order, the manager can send an email to the users with the requester user role.

You must configure the application server for email notification for work order changes before you enable email notification.

Only users with a user role of admin can enable email notification for work order changes.

To assign email addresses to users, you must have the standard Internet email address for each user. For example, user@example.com.

To enable email notification for work order changes:

1. Access the manager on the application server.
2. Click **Configuration**.
3. Click **Users and Groups**.
4. Under **User Management**, click **Enable email notifications**.
5. For each user that is to receive email notifications, click the user under **User Management**, click **Set Email Address**, and complete the dialog.

## Assigning email addresses to users

You can configure the manager so that the manager sends email notifications whenever there is a change in the state of a work order. For example, when a designer associates a service with a work order, the manager can send an email to the users with the requester user role. The manager can send email to a user only if you assign an email address to the user.

Only users with a user role of admin can assign notification email addresses to users.

To assign email addresses to users, you must have the standard Internet email address for each user. For example, user@example.com.

The manager must be enabled to send email notifications to users.

To assign email addresses to users:

1. Access the manager on the application server.
2. Click **Configuration**.
3. Click **Users and Groups**.
4. For each user that is to receive email notifications, click the user under **User Management**, click **Set Email Address**, and complete the dialog.

To remove an email address from a user account, follow the same procedure that was used to assign the email address.

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## Using the manager

After the manager is configured, users can run services, schedule services, and monitor the progress of services using the manager.

Before you begin, you must use a web browser to access and sign into the manager. The default location is at `http://hostname:port/optim/console/`, where *hostname* and *port* are the host name and port of the application server on which the manager is deployed. If you install the version of WebSphere Application Server Community Edition that is delivered with the manager, and you deploy the manager to that copy of WebSphere Application Server Community Edition, then the default port is 8080.

If you cannot access the manager, ensure that the manager is started by the administrator of the application server on which the manager is deployed, that you can access the application server from your computer, and that your web browser is supported by the manager and uses a supported version of the Adobe Flash Player plug-in.



## Running a service or service set

Use the manager to run a test- or production-level service, or to run a service set that contains test- or production-level services.

You can run a service only if the service is ready to run. If a service is not ready to run, **Service Management** contains details about what must be done to make the service ready to run.

You can run a service set only if all services in the service set are ready to run.

To run a service or service set, a user must have access to the **Service Management** tab. If the service belongs to service groups, the user must have access to the service groups to which the service belongs.

To run a service or service set by using the manager:

1. Access the manager on the application server.
2. Click **Service Management**.
3. Open the **Services** folder and click the service, or open the **Service Sets** folder and click the service set.
4. Click **Inputs** and review the input values for the service. You can change the input values and click **Save** to save the changes. Any changes that you make to the input values are saved until you change the input values again. If you are running a service set, you can change the input values of any of the services in the service set. These changes are made to the services themselves and not to the service set.
5. Click **Run** and complete the wizard.

### Related tasks:

“Accessing the manager on an application server” on page 9

Use a web browser to access the manager on an application server.

“Assigning a server to a service” on page 11

Use the manager to assign a server to a service. You must assign a server to a service before you can run the service. You must assign a server to each service within a service set before you can run the service set.

## Scheduling a service or service set

Use the manager to schedule a test- or production-level service, or to schedule a service set that contains test- or production-level services. You can schedule the service to be run at a specific time or at a specific interval. If the service already has an active schedule, you can use the manager to change that schedule.

You can schedule a service only if the service is ready to run. If a service is not ready to run, **Service Management** contains details about what must be done to make the service ready to run.

You can schedule a service set only if all services in the service set are ready to run.

Only users with a user role of admin, designer, or operator can schedule a service or service set. To schedule a service or service set, a user must have access to the **Service Management** tab. If the service belongs to service groups, the user must have access to the service groups to which the service belongs.

To schedule a service or service set by using the manager:

1. Access the manager on the application server.
2. Click **Service Management**.
3. Open the **Services** folder and click the service, or open the **Service Sets** folder and click the service set.
4. Click **Inputs** and review the input values for the service. You can change the input values and click **Save** to save the changes. Any changes that you make to the input values are saved until you change



the input values again. If you are scheduling a service set, you can change the input values of any of the services in the service set. These changes are made to the services themselves and not to the service set.

5. Click **Schedule**. If the service or service set already has an active schedule, **Schedule** shows you the active schedule. If the service or service set does not have an active schedule, click **Create Schedule**.
6. Enter or change the schedule details and click **Save**.

**Related tasks:**

“Accessing the manager on an application server” on page 9

Use a web browser to access the manager on an application server.

“Assigning a server to a service” on page 11

Use the manager to assign a server to a service. You must assign a server to a service before you can run the service. You must assign a server to each service within a service set before you can run the service set.

## Stopping a service set

You can use the manager to stop a service set before it completes. You might want to stop a service set when a service within the service set fails.

You can stop only service sets. You cannot stop individual services.

To stop a service set, a user must have access to the **Service Monitoring** tab. Any user can stop service sets that were run or scheduled by any other user.

Stopping a service set does not undo any changes that the service set made to the database.

To stop a running service set by using the manager:

1. Access the manager on the application server.
2. Click **Service Monitoring**.
3. In the first section of the **Service Monitoring** page, click the instance that corresponds with the service set that you want to stop. You might need to use a different service monitoring filter to see the instance that corresponds with the service set that you want to stop.
4. Click **Stop Service Set**, and click **OK** to confirm.

**Related tasks:**

“Accessing the manager on an application server” on page 9

Use a web browser to access the manager on an application server.

## Creating a work order

Use the manager to create a work order, which is a request to create or change a service or service set for a specific purpose. After a work order is created, the work order must be reviewed by other users. The work order can then be approved and fulfilled, or the work order can be returned to you without being fulfilled.

Only users with a user role of admin or requester can create a work order. To create a work order, a user must have access to the **Work Order Management** subtab under the **Work Order** tab.

To create a work order by using the manager:

1. Access the manager on the application server.
2. Click **Work Orders**.
3. Click **New** and enter a description that states the business reason for the request and outlines what the service or service set must do. You can change the priority of the work order and add more comments as appropriate.

4. Click **Send Request**.

## Processing a work order

A *work order* is a request to create or change a service or service set for a specific purpose. Users must regularly review the work orders in the manager to verify whether the user must act upon a work order.

To process a work order, a user must have access to the **Work Order Management** subtab under the **Work Order** tab.

To process a work order by using the manager:

1. Access the manager on the application server.
2. Click **Work Orders**.
3. Use the filters to reduce the number of displayed work orders. The following table indicates the work order states that are typically processed by each user role.

User role	State
reviewer	<b>Pending Review</b>
designer	<ul style="list-style-type: none"><li>• <b>Pending Creation</b></li><li>• <b>In Progress</b></li><li>• <b>Incomplete</b></li><li>• <b>Rejected by Designer</b></li><li>• <b>Returned to Designer</b></li></ul>
requester	<ul style="list-style-type: none"><li>• <b>Denied by Reviewer</b></li><li>• <b>Rejected by Designer</b></li><li>• <b>Ready</b></li></ul>

4. Click a work order to review detailed information about the work order. Use the detailed information to decide what action to take with the work order. The possible actions that you can take depend on the state of the work order and your user role.

State	Action
<b>Pending Review</b>	<ul style="list-style-type: none"><li>• To add a comment without changing the state, click <b>Edit</b>, enter the comment into <b>Add comments</b>, and click <b>Save</b> (all user roles).</li><li>• To approve the work order for development, click <b>Edit</b>, enter a comment into <b>Add comments</b>, and click <b>Approve</b> (user roles admin and reviewer only).</li><li>• To deny the work order and return the work order to the requester for more information or closure, click <b>Edit</b>, enter a comment into <b>Add comments</b>, and click <b>Deny</b> (user roles admin and reviewer only).</li><li>• To close a work order, click <b>Edit</b>, click <b>Terminate</b>, and click <b>OK</b> to confirm (user roles admin and requester only).</li></ul>

State	Action
Denied by Reviewer	<ul style="list-style-type: none"> <li>To add a comment without changing the state, click <b>Edit</b>, enter the comment into <b>Add comments</b>, and click <b>Save</b> (all user roles).</li> <li>To resubmit the work order to the reviewer, click <b>Edit</b>, enter a comment into <b>Add comments</b>, and click <b>Resubmit</b> (user roles admin and requester only).</li> <li>To close a work order, click <b>Edit</b>, click <b>Terminate</b>, and click <b>OK</b> to confirm (user roles admin and requester only).</li> </ul>
Pending Creation	<ul style="list-style-type: none"> <li>To add a comment without changing the state, click <b>Edit</b>, enter the comment into <b>Add comments</b>, and click <b>Save</b> (all user roles).</li> <li>To accept the work order for further review or development, click <b>Accept</b> (user roles admin and designer only).</li> <li>To close a work order, click <b>Edit</b>, click <b>Terminate</b>, and click <b>OK</b> to confirm (user roles admin and requester only).</li> </ul>
In Progress	<ul style="list-style-type: none"> <li>To add a comment without changing the state, click <b>Edit</b>, enter the comment into <b>Add comments</b>, and click <b>Save</b> (all user roles).</li> <li>To fulfill the work order, click <b>Edit</b>, and then click <b>Fulfill</b>. You can then fulfill the work order in either of the following ways: <ul style="list-style-type: none"> <li>Associate a service or service set with the work order to enable the requester to run the work order.</li> <li>Indicate that you fulfilled the work order by running the services yourself.</li> </ul> <p>When you are done, click <b>OK</b>, enter any appropriate comments into <b>Add comments</b>, and click <b>Save</b> (user roles admin and designer only).</p> </li> <li>To reject the work order and return the work order to the requester for more information or closure, click <b>Edit</b>, enter a rejection comment into <b>Add comments</b>, and click <b>Reject</b> (user roles admin and designer only).</li> <li>To close a work order, click <b>Edit</b>, click <b>Terminate</b>, and click <b>OK</b> to confirm (user roles admin and requester only).</li> </ul>
Rejected by Designer	<ul style="list-style-type: none"> <li>To add a comment without changing the state, click <b>Edit</b>, enter the comment into <b>Add comments</b>, and click <b>Save</b> (all user roles).</li> <li>To resubmit the work order to the designer, click <b>Edit</b>, enter a comment into <b>Add comments</b>, and click <b>Resubmit</b> (user roles admin and requester only).</li> <li>To close a work order, click <b>Edit</b>, click <b>Terminate</b>, and click <b>OK</b> to confirm (user roles admin and requester only).</li> </ul>

State	Action
Incomplete	<ul style="list-style-type: none"> <li>To run the service or service set that is associated with the work order, click <b>Inputs</b>, edit the inputs for the service or for the services in the service set, click <b>Save</b>, and click <b>Run</b> (all user roles).</li> <li>To add a comment without changing the state, click <b>Edit</b>, enter the comment into <b>Add comments</b>, and click <b>Save</b> (all user roles).</li> <li>To close a work order, click <b>Edit</b>, click <b>Terminate</b>, and click <b>OK</b> to confirm (user roles admin and requester only).</li> </ul>
Ready	<ul style="list-style-type: none"> <li>To run the service or service set that is associated with the work order, click <b>Inputs</b>, edit the inputs for the service or for the services in the service set, click <b>Save</b>, and click <b>Run</b> (all user roles).</li> <li>To add a comment without changing the state, click <b>Edit</b>, enter the comment into <b>Add comments</b>, and click <b>Save</b> (all user roles).</li> <li>To return the work order to the designer, click <b>Edit</b>, enter a comment into <b>Add comments</b> and click <b>Return</b> (user roles admin and requester only).</li> <li>To close a work order, click <b>Edit</b>, click <b>Terminate</b>, and click <b>OK</b> to confirm (user roles admin and requester only).</li> </ul>
Returned to Designer	<ul style="list-style-type: none"> <li>To add a comment without changing the state, click <b>Edit</b>, enter the comment into <b>Add comments</b>, and click <b>Save</b> (all user roles).</li> <li>To resubmit the work order to the requester, click <b>Edit</b>, enter a comment into <b>Add comments</b>, and click <b>Resubmit</b> (user roles admin and designer only).</li> <li>To close a work order, click <b>Edit</b>, click <b>Terminate</b>, and click <b>OK</b> to confirm (user roles admin and requester only).</li> </ul>

## Running a service or service set that is associated with a work order

Use the manager to run a service or service set that is associated with a work order.

You can run a service only if the service is ready to run.

You can run a service set only if all services in the service set are ready to run.

Only users with a user role of admin or requester can run a service or service set that is associated with a work order. To run a service or service set that is associated with a work order, a user must have access to the **Work Orders** tab. If the service belongs to groups of services, the user must have access to the groups of services to which the service belongs.

To run a service or service set by using the manager:

1. Access the manager on the application server.
2. Click **Work Orders**.
3. Click **Inputs**, and review the input values for the service or service set that is associated with the selected work order. You can change the input values and click **Save** to save the changes. Any changes that you make to the input values are saved until you change the input values again. If you

are running a service set, you can change the input values of any of the services in the service set. These changes are made to the services themselves and not to the service set.

4. Click **Run**.

If the service or service set does not run, verify that the service or service set is ready to run. In the detailed information for the work order, find the name of the service or the service set that is associated with the work order. Click **Service Management** and verify that the service or service set is ready to run. If the service or service set is not ready to run, **Service Management** contains information about how to make the service or service set ready to run. If you do not have access to the **Service Management** tab, return the work order to the designer and ask the designer to diagnose and fix the issues.

## Monitoring the status of service instances by using the manager

The manager contains features that you can use to monitor the status of the services that you run.

### Dashboard

When you access the manager on an application server, you can use the **Dashboard** interface. Use **Dashboard** to monitor the status of the manager, its associated configured servers, and any services that are run by using the manager.

### Service Monitoring

Under **Service Monitoring**, you can review the service instance records that are generated when a service or service set is run. Service instance records show the folder in which each service is located and the service instance status. Service instance records also show the service instance start and end times, the service type, and the server that was used to run the service instance.

If you access the manager on an application server, a user can see a service instance record only if the user has access to all groups of services to which all of the associated services belong. For example, user smith does not have access to any groups of services. User smith therefore cannot see any service instance records for any services that belong to a group of services. User smith also cannot see any service instance records for any service sets that contain services that belong to a group of services.

### Service Management

Under **Service Management**, you can review a graph that indicates the ratio of services that are ready to services that are not ready. Double-click the graph to jump to the location where you can run services that are ready.

To view the information in the graphs in tables, click **Tabular View**.

### Configuration

Under **Configuration**, you can review the status of the configured servers. You can also see whether there are any connection issues between the manager and the configured servers. Connection issues can indicate that there is a network issue or that the configured servers are not running.

### Service Monitoring

Use **Service Monitoring** to view a list of service instance records on the manager. A service instance record is created whenever a service or service set is run. Service instance records show the status of each service instance and indicate whether the service instance completed successfully.

**Service Monitoring** shows all service instance records on the manager, regardless of whether the service or service set was run from **Service Management**, from **Work Orders**, or through the service interface.

**Service Monitoring** contains two sections:

- The first section contains a list of service instance records.
- The second section contains more detailed information about the service instance that is selected in the first section. You can use this information to diagnose problems if the service does not complete successfully.

If you access the manager on an application server, you can create filters to limit the types of service instance records that are displayed in **Service Monitoring**. You can filter the list by status, service type, server, and service start time. Filters are saved with your user record and are available until you delete the filter.

If you access the manager on an application server, a user can see a service instance record only if the user has access to all groups of services to which all of the associated services belong. For example, user smith does not have access to any groups of services. User smith therefore cannot see any service instance records for any services that belong to a group of services. User smith also cannot see any service instance records for any service sets that contain services that belong to a group of services.

## Work Order Monitoring

The **Work Order Monitoring** subtab on the **Work Orders** tab displays a list of the service instances that are generated when you use a work order to run a service or service set. Select a service instance to display the following detailed information about the service instance:

- **Details** shows overview information about the selected service instance.
- **Comments** shows the comments that were added to the work order that is associated with the selected service instance.
- **Inputs** shows the parameters that were used to run the service or the service set.
- **Outputs** shows log information that was generated by the server when the service or the service set was run.

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## Appendix. InfoSphere Optim Manager user interface reference

The user interface of IBM InfoSphere Optim Manager allows you to run and manage Optim services.

The InfoSphere Optim Manager user interface contains the following tabs and the **Preferences** dialog.

- **Dashboard**
- **Configuration**
- **Service Management**
- **Service Monitoring**

Some tabs might not be available to some users or in some situations. The manager might also contain user-defined tabs that are not in the standard user interface.

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### Dashboard

When you access the manager on an application server, you can use the **Dashboard** interface. Use **Dashboard** to monitor the status of the manager, its associated configured servers, and any services that are run by using the manager.

#### Service Monitoring

Under **Service Monitoring**, you can review the service instance records that are generated when a service or service set is run. Service instance records show the folder in which each service is located and the service instance status. Service instance records also show the service instance start and end times, the service type, and the server that was used to run the service instance.

If you access the manager on an application server, a user can see a service instance record only if the user has access to all groups of services to which all of the associated services belong. For example, user smith does not have access to any groups of services. User smith therefore cannot see any service instance records for any services that belong to a group of services. User smith also cannot see any service instance records for any service sets that contain services that belong to a group of services.

#### Service Management

Under **Service Management**, you can review a graph that indicates the ratio of services that are ready to services that are not ready. Double-click the graph to jump to the location where you can run services that are ready.

To view the information in the graphs in tables, click **Tabular View**.

#### Configuration

Under **Configuration**, you can review the status of the configured servers. You can also see whether there are any connection issues between the manager and the configured servers.

Connection issues can indicate that there is a network issue or that the configured servers are not running.

#### Related reference:

“Monitoring the status of service instances by using the manager” on page 21

The manager contains features that you can use to monitor the status of the services that you run.

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### Configuration

When you access the manager on an application server, you can use the **Configuration** interface. Use **Configuration** to create and configure user-defined tabs and groups of services and to configure how work orders are processed.

Users with administrator access to the manager (user role admin) can use **Configuration** to perform the following tasks.

- Creating groups of services and granting user access to these groups of services
- Creating user-defined tabs that are displayed within the manager
- Configuring the tabs that can be viewed by users who do not have user role admin
- Changing the workflow that is used to process work orders
- Enabling email notification of changes to work order states

**Related tasks:**

“Creating a group of services” on page 13

A *group of services* is a collection of services that are to be run or scheduled only by specific users. Create groups of services to control which users can run which services.

“Granting user access to a group of services” on page 13

A *group of services* is a collection of services that are to be run or scheduled only by specific users. If a service is in a group of services, a user can run the service only if the user is granted access to the group of services.

“Creating a user-defined tab in the manager” on page 13

The manager can have user-defined tabs that contain web applications or web sites.

“Changing access to tabs in the manager” on page 14

You can simplify the manager interface by hiding tabs from users who do not have a user role of admin.

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## Service Management

Use **Service Management** to configure, run, and manage services and service sets.

**Service Management** contains two sections:

- A section that displays a list of services in the Optim directory and a list of service sets in the Optim directory
- A section that displays detailed information about the service or service set that is selected in the first section

Select a service or service set to display additional information about the service or service set:

- **Details** shows overview information about the selected service or about each service in the selected service set. You can use this information to diagnose issues that prevent you from running the service.
- **Inputs** shows the parameters that are used to run the selected service or to run each service in the selected service set. You can change the values of the parameters for many types of service. If you can change the parameter values, you can also reset the parameters to their default values. You must save any changes that you make to the parameter values before you run the service. If you do not save your changes, the server uses the previously saved values for these parameters when the server runs the service.
- **Schedule** shows all existing schedules for the selected service or service set. You can create one schedule for each service and service set. You can set the schedule to run once, to repeat at a specific interval, or to run on a certain day of the month. If the day of the month that you specify does not exist in a month, the schedule does not run during that month. If you set the schedule to repeat, you can set the schedule to repeat indefinitely or to repeat until a certain date and time.



### Related tasks:

“Assigning a server to a service” on page 11

Use the manager to assign a server to a service. You must assign a server to a service before you can run the service. You must assign a server to each service within a service set before you can run the service set.

“Changing the service inputs” on page 12

Each service contains default values that the service uses to complete its task (such as the user name and password to access a data source). You can use the manager to change the values that are used by the service. You can also restore the service inputs to their default values.

“Creating a service set” on page 12

A *service set* is an ordered list of services. When you run a service set, the manager runs each service in the service set, one at a time, in the specified order. Create a service set to run related services with a single action.

“Running a service or service set” on page 16

Use the manager to run a test- or production-level service, or to run a service set that contains test- or production-level services.

“Scheduling a service or service set” on page 16

Use the manager to schedule a test- or production-level service, or to schedule a service set that contains test- or production-level services. You can schedule the service to be run at a specific time or at a specific interval. If the service already has an active schedule, you can use the manager to change that schedule.

“Stopping a service set” on page 17

You can use the manager to stop a service set before it completes. You might want to stop a service set when a service within the service set fails.

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## Service Monitoring

Use **Service Monitoring** to view a list of service instance records on the manager. A service instance record is created whenever a service or service set is run. Service instance records show the status of each service instance and indicate whether the service instance completed successfully.

**Service Monitoring** shows all service instance records on the manager, regardless of whether the service or service set was run from **Service Management**, from **Work Orders**, or through the service interface.

**Service Monitoring** contains two sections:

- The first section contains a list of service instance records.
- The second section contains more detailed information about the service instance that is selected in the first section. You can use this information to diagnose problems if the service does not complete successfully.

If you access the manager on an application server, you can create filters to limit the types of service instance records that are displayed in **Service Monitoring**. You can filter the list by status, service type, server, and service start time. Filters are saved with your user record and are available until you delete the filter.

If you access the manager on an application server, a user can see a service instance record only if the user has access to all groups of services to which all of the associated services belong. For example, user `smith` does not have access to any groups of services. User `smith` therefore cannot see any service instance records for any services that belong to a group of services. User `smith` also cannot see any service instance records for any service sets that contain services that belong to a group of services.

#### Related reference:

“Monitoring the status of service instances by using the manager” on page 21

The manager contains features that you can use to monitor the status of the services that you run.

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## Work Orders

Use **Work Orders** to create, process, and monitor the progress of work orders. A *work order* is a request to create or change a service or service set for a specific purpose.

**Work Orders** contains two subtabs:

- **Work Order Management** displays a list of work orders. Select a work order to display the following detailed information about the work order:
  - **Details** shows overview information about the selected work order.
  - **Comments** shows the comments that have been added to the work order.
  - **Inputs** shows the parameters that are used to run the service or the service set that is associated with the work order. You can change the values of the parameters for many types of service. If you can change the parameter values, you can also reset the parameters to their default values. You must save any changes that you make to the parameter values before you use the work order to run the service. If you do not save your changes, the server uses the previously saved values for these parameters when the server runs the service.
- **Work Order Monitoring** displays a list of the service instances that are generated when you use a work order to run a service or service set. Select a service instance to display the following detailed information about the service instance
  - **Details** shows overview information about the selected service instance.
  - **Comments** shows the comments that were added to the work order that is associated with the selected service instance.
  - **Inputs** shows the parameters that were used to run the service or the service set.
  - **Outputs** shows log information that was generated by the server when the service or the service set was run.

---

## Preferences

Use **Preferences** to set the preferred operation settings for the manager.

### User Preferences

**User Preferences** are available if you access the manager on an application server. Each user can set **User Preferences** for the time intervals at which the manager refreshes its display and to set the Optim directory to use on startup.

### Global Preferences

**Global Preferences** are available if you access the manager from the designer or if an administrator accesses the manager on an application server.

- Designer users can use **Global Preferences** to set the time intervals at which the manager refreshes its display.
- Administrators can use **Global Preferences** to set the default time intervals for all manager users and the security settings for the manager (such as timeout).

## Display Preferences

Each user can use **Display Preferences** to set the color scheme and font size that is used on the local computer. Each user can also set the manager so that a confirmation dialog is not displayed when the user runs a service or service set.



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