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Introduction to Team Collaboration

Visual Paradigm Team Collaboration Guide trademark disclaimer

A list of trademarks to use in the Visual Paradigm Team Collaboration Guide, as well as their owners. This list is subject to change without notice.

Overview of Visual Paradigm's team collaboration support

Visual Paradigm allows you to keep your work in a central repository. It also supports the sharing of design and task management. You will learn more in this article.

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Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Overview of Visual Paradigm's team collaboration support

Key features

Central repository of design

Keep and manage your projects as well as the related reference files (known as Teamwork Files) in a central repository.

Keep revisions for your work

Whenever a team member has performed a 'commit', a new 'revision' is created and stored in the repository. You can easily browse or restore from your work done earlier.

Work collaboratively and concurrently

When several team members need to work on the same project, version control is always a major concern. The time and effort spent on merging the works of each team member is very expensive, and is very risky that the previous works may be overwritten by the new changes. Our teamwork mechanism helps merge changes made by team members. Whenever contradicted changes are made by two members, you will be prompted for a resolution.

Share your design with business stakeholders

The PostMania feature allows you to share diagram online. You can share your business design with business stakeholder, or to put your database design online so that developers can read it as a reference in system development.

Tasifier

Create tasks and keep track of the progress of project with Tasifier, a task management tool.

Cloud base vs Self-hosted (On premise)

Visual Paradigm's team collaboration support comes with two options - cloud and self-hosted. They differ in the way how your work is stored. By connecting to Visual Paradigm Online, your work will be stored securely in our cloud repository. You can access your work any time and anywhere that has an active Internet connection. The self-hosted solution allows you to host our server and repository at your site locally. This option is welcomed by many enterprise.

In this guide there are separate parts and chapters for VPository and Teamwork Server.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Introducing Visual Paradigm Online

Visual Paradigm Online ("VP Online") is a cloud-based collaboration platform for you to store your Visual Paradigm projects online. Learn more about Visual Paradigm Online in this chapter.

Introducing Team Collaboration with VP Online

Visual Paradigm Online - Cloud-based collaboration platform for you to store your software designs online. Learn what VPository is.

Introducing Team Collaboration with VP Online

The Visual Paradigm product family has two main products: Visual Paradigm and Visual Paradigm Online ("VP Online"). Visual Paradigm is a traditional desktop application that can be downloaded and run in your operating system, while Visual Paradigm Online is a modern zero-configuration service that runs on a web browser.

Although the two products are fundamentally different, VP Desktop relies on the web technologies provided by VP Online in order for the team collaboration features to function. In this article we will have a quick look at these features.

Team collaboration features

Online cloud repository of members and projects

By signing up an VP Online account, your team will be given a cloud-based repository where members and projects are organized and accessible. Team members can keep their projects and related artifacts in the cloud, and have them accessible any time and from anywhere.

Work collaboratively and concurrently

Team members simply open a project from the cloud repository, start working in Visual Paradigm, and then commit the changes back to the repository, and that's it. Changes are then accessible to all the other team members. You don't have to maintain any server or remote drive or perform any manual actions to get works shared among the team. Just have your team focus on their work and let us do everything else for you.

Access globally

Let everyone work on the same project concurrently without overwriting each other works. Access to the most up-to-date design regardless of the team members' geographic locations.

Share

Get immediate response from clients about the design - your client just need a web browser to post comments and be notified for any updates of the design.

Safe

Your works are kept in the cloud on revision base. It is easy to recover deleted model elements from an old revisions. We will also backup all your projects daily to prevent permanent data loss.

Secure

Communications between Visual Paradigm and VP Online are protected by SSL data encryption (same technology as online banks).

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Subscribing to VP Online

Start collaborate and share with your team and client with 1 GB free storage. Learn more about VP Online subscription in this chapter.

Signing up an VP Online account from VP Desktop

Sign up Visual Paradigm Online and start team collaboration today. Sign up Free online.

Changing Visual Paradigm Online Subscription Plan

Upgrade your current Visual Paradigm Online subscription plan for more storage. VP Online offers three subscription plans, with different amount of storage available.

Signing up an VP Online account from VP Desktop

The team collaboration features are supported partly by Visual Paradigm Online ("VP Online"). In order to use the collaboration features, you and your teammates have to be a member of Visual Paradigm Online.

Read this page to learn how to sign-up VP Online for free.

1. Select **Team > Select Repository** from the application toolbar.

Connect to Visual Paradigm Online/Teamwork Server		×
This feature requires the connection with either Visual Paradign	n Online ("VP Online") or Teamwork Server. Please choose a	a method below to continue.
		-E
Sign up VP Online ?	Local Workspace (Quick Setup)	Existing Registered User ?
Claim an online workspace for yourself or your team, and start enjoying the cloud-based features.	Try out those Cloud-based features without the need to connect to VP Online.	Log-in to your existing VP Online or Teamwork Server account.
Sign up	Setup	Log-in
		Cancel

Teamwork Client login screen

2. Click on Sign up.

From Subject To

3. In the Sign up Visual Paradigm Online window, enter your email address and password. Fill-in the subdomain to complete the Cloud entry point. Cloud entry point is the URL where you and your teammates can visit to log in to your account. It is unique to your team, so we recommend you fill in your company or team name here.

Sign up Visua	l Paradigm Online	×				
Email:	mike.hardy@demo-vp.com					
	We will send you a confirmation email. As a manager of the account, you can create projects and invite others to join the projects.					
Password:						
Cloud entry point:	https:// scorpio .vpository.com					
🗹 🛛 I agree to	Visual Paradigm Online's Terms of Service and Privacy Policy					
	Sign Up Cancel					

Signing up Visual Paradigm Online

- 4. Read both the terms of service and privacy policy carefully. If you accept, check I agree to Visual Paradigm Online's Terms of Service and Privacy Policy and click Sign Up.
- 5. A confirmation email is sent to you and it should arrive within 10 minutes. If you haven't received the email after a good while, please check the junk folder of your email client. Click on the confirmation link in the email.

 -paradigm.com' 🚖 isual Paradigm Online account	🆘 Reply	« Reply All 🔻	➡ Forward	Archive	6 Junk	O Delete	More *
ke.hardy@demo-vp.com> 🏠							
😵 Visual Paradigm							
Dear Mike Hardy,							
Just one last step before you click the link below to confirm		-	digm Online.	Please			
Confirm your	Visual Par	radigm Online	account				
Cheers, Visual Paradigm Online							
Visual Paradigm International https://www.visual-paradigm.com/		General Information Technical Support:	-	aradīgm.com al-paradīgm.com	n		

Confirm VP Online subscription

6. A web page is opened, telling you that your account is activated. Enter the name of the repository, which is preferably the name of your company. Then, enter your name and password. From now on, you can create and manage members and project through the web interface of Visual Paradigm Online. Project creation can also be done from within Visual Paradigm Desktop.

Account Activated

This account has already been confirmed. You may click on the link below to log in now.

Log in to Visual Paradigm Online

VP Online account activated

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Changing Visual Paradigm Online Subscription Plan

Visual Paradigm Online comes with 1 GB storage size by default. If you find your account lacks storage space, consider to upgrade your current plan for more storage space. Listed below are the available subscription plans.

	Storage Size	Price
Default	1 GB	Free
Value	30 GB	US \$129 per month
Deluxe	100 GB	US \$229 per month

The various Visual Paradigm Online subscription plans

(For even more storage size, feel free to <u>contact us</u> for a tailored option)

To upgrade your subscription plan, perform the steps below.

- 1. Visit the URL of your VP Online cloud entry point through web browser.
- 2. Log in your account.
- 3. Click on your profile image at top right and select Administration from the popup menu.



Open Administration page

4. Select **System Tools** from the menu on the left.



Opening System Tools page

5. Click on Change Subscription Plan....



Change subscription plan

6. This store page is opened. Click on the **Subscribe** button on the plan you want to subscribe to.

	Value Subscription Monthly Payment	Deluxe Subscription Monthly Payment
Features	\$129 per month	\$299 per month
Version Upgrades	1	
Storage Size	30GB	100GB
Unlimited Projects and Members		1
Team Collaboration with Visual Paradigm		1
	Subscribe	Subscribe

Subscribe to Value plan

- 7. This opens the shopping cart page. You may optionally change your name and email address for your customer account, i.e. your account in our Customer Service Center. Note that you are not allowed to change your VP Online login and cloud entry point.
- 8. Review your billing information and order. If alright, click on any of the payment methods (2Checkoutout.com, PayPal) and click **Check Out** near the bottom of the page. Follow the on-screen instruction to settle your payment. When you finish, your subscription plan will be upgraded automatically. You do not need to do anything extra.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

VP Online Administration

Learn how to perform administration activities for your Visual Paradigm Online ("VP Online") account.

Inspecting storage space usage

Learn how to inspect storage space usage to ensure your team does not exceed the maximum allowed storage.

Deleting project

Learn how to delete project to free storage space.

Managing members

Learn how to invite members to VP Online.

LDAP Authentication

Login Visual Paradigm Online with LDAP credentials. Create users in LDAP and set permissions.

Active Directory Authentication

Login VP Onlinewith Active Directory credentials. Create users in Active Directory and set permissions.

Setting up VP Online with Okta

Visual Paradigm Online supports Okta for Enterprise clients. In this article we will go into the details of setting up SAML authentication through Okta.

Setting up VP Online with Microsoft Azure

Visual Paradigm Online supports Microsoft Azure for Enterprise clients. In this article we will go into the details of setting up SAML authentication through Microsoft Azure.

Managing groups

Learn how to create group and add members to it.

LDAP Authentication (Groups)

Login Visual Paradigm Online with LDAP credentials. Create users and user groups in LDAP and set permissions.

Active Directory Authentication (Groups)

Login Visual Paradigm Online with Active Directory credentials. Create users and user groups in Active Directory and set permissions.

Managing projects

Learn how to create projects in VP Online.

Setting working days and holidays

Tasifier takes working days and holidays into account. The date picker can indicate those non-working days and holidays as colored cells. In this page you will learn how to configure working days and holiday profile in VP Online.

Setting Default Visibility of Various Panes

Let team members share the same set of visibility of panes. This article shows you how to set default visibility of the four Visual Paradigm panes in VP Online.

Inspecting storage space usage

The manager of Visual Paradigm Online ("VP Online") can check the amount of used and remaining storage space to ensure that there is enough space for a continued project development.

Inspect overall storage space usage

1. Visit the URL of your VP Online cloud entry point through web browser.

- 2. Log in your account.
- 3. Click on your profile image at top right and select Administration from the popup menu.



Open Administration page

4. Select **System Tools** from the menu on the left hand side.

٩	Tools
Con	liguration
\$	System Tools

Opening System Tools page

5. Open the **Disk Usage** tab to view the storage space usage.



Subscription information

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Deleting project

When your Visual Paradigm Online ("VP Online") account has run out of space, you can delete any unneeded project to free storage space. Follow the instructions below for a deletion.

Note that project deletion is not irreversible. You may also consider upgrading your VP Online subscription plan for more storage.

To delete a project:

- 1. Visit the URL of your VP Online cloud entry point through web browser.
- 2. Log in your account.
- 3. Click on your profile image at top right and select Administration from the popup menu.



Open Administration page

4. Select **Projects** from the menu on the left.



5. Move your mouse pointer over the row of the project that you want to delete, and then click Edit.

		/isions
Project	Revisions	Members
AM-Headlines [Add Member] [Edit]	1	9
atm	1	9

To edit a project

6. Click on [Delete Project] at top right.

Project Member	s 🛛 Wat	chers Rev	visions	PostMania	Branches		
Project Name: *		AM-Headlines	1				[Delete Project]
Relative Project Direct	tory: *	AM-Headline	es				
Size:		566 KB					
Enable Tasifier	[?]	https://online.v	visual-parad	ligm.com/tasifier.js;	p#proj=1		
Enable Agile	[?]	https://online.v	visual-parad	ligm.com/scrum.jsp	#storymap:proj=	1	
Enable PostMania	[?]	https://online.v	visual-parad	ligm.com/postmani	a.jsp#proj=1		

Delete project

7. You are prompted to answer a math question. Enter the answer and click **Delete**.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Managing members

A member is someone who has sufficient right to be the server administrator and/or be a general team member who works on a project file. A member can be assigned to one or more projects, and can be granted the permissions to read and/or update them. Moreover, selected members can be granted permission to administer (add/edit/remove) members or projects, so that the members can have all or part of the powers of a server manager.

Inviting member

You, as a manager of an Visual Paradigm Online ("VP Online") account, can add your friends or coworkers to VP Online through an 'invitation' process, to let them create, read and/or modify the projects in your account. To invite member:

- 1. Visit the URL of your VP Online cloud entry point through web browser.
- 2. Log in your account.
- 3. Click on your profile image at top right and select Administration from the popup menu.



Open Administration page

4. Select **Members** from the menu on the left.

Man	agement
8	Projects
1	Members 🖑
	Open Members page

5. Under the **Members** tab, click on **Invite Member**.

Members	Groups	Viewers		
Invite Me	ember Licer	nse 🔻		
	Nembers			
	/like Hardy			

Invite member

6. In the **Invite Teammate** screen, enter the name(s) and email address(es) of your teammates and click **Send Invitation**. Your teammates will receive an invitation email that invites them to join VP Online. If they accept the invitation (by clicking the confirmation link in the email), they will become the members of VP Online.

Invite Teammate		×
Add your friends or coworkers click Send Invitation to invite th	to VP Online. Enter their names and email addresses and em.	
Name:	Email:	
Gertrude Conte	gertrude.conte@demo-vp.com	X
Linda Trent	linda.trent@demo-yp.com	+
	Send Invitation Cance	4

Editing member

You can edit a member to change his/her name, password and permissions.

- 1. Visit the URL of your VP Online cloud entry point through web browser.
- 2. Log in your account.
- 3. Click on your profile image at top right and select Administration from the popup menu.
- 4. Select **Members** from the menu on the left.
- 5. Move your mouse pointer over the row of member to edit and then click Edit.

Invite	e Member License 👻			e	Show active members only	۹
	Members	Projects	Last Login	Status	Edition	
	Gertrude Conte (Edit)	0	-	Active	Express	
	Linda Trent	0	-	Active	Express	
	Mike Hardy	1	Mar 06, 2018	Active	Express	

Edit a member

- 6. You may now edit the name, email and password of the member.
- 7. Switch to the **Permissions** tab. You may adjust the various permissions granted to this member. This includes the administrator rights for creating/updating/deleting member and/or project, and the right to perform certain action in Visual Paradigm. The following table lists permissions you can set.

Option	Description
Repository	 Create project - Project refers to a Visual Paradigm project that is available to be checked out by a member from client side. The create right enables this member to add a new project into the server. He/she can create project by creating a blank project, by importing an existing .vpp project file or by importing an opening project when creating project at client side. Update project - Enables this member to modify the description, member assignments and granted permissions of projects. Delete project - Enables this member to remove a project from server. Create member - Member is someone who has sufficient right to be the server administrator and/or be a general team member who works on a project file. The create right enables this member to create members in server. Update member - Enables this member to modify the name, login ID, password, administrator permissions and project assignments for all members in server. Manage member groups - A group is a named group of members who who share the same read and/or commit rights of project(s). By enabling this option, the member rime server. Manage Just-in-Time work items - The Just-in-Time Process Map of Visual Paradigm (Desktop) provides users with a gallery of forms and work items to use in process construction. This page is for you to manage the forms and work items to list in the gallery. By uploading a .dat of forms and/or work items, team members will be able to access the forms and/or work items in the gallery in developing their Just-in-Time processes. By enabling this option, the member will be able to add and remove Just-in-Time work items through the "Just-in-Time Work Items" page on the left.
Access of features	The functions member can/cannot perform in Visual Paradigm. Override the locks applied to elements and diagrams - When allowed, member can unlock a diagram locked by anyone, even for diagrams with password protected. Project options - When allowed, member can modify the configurable options set to projects. Add and remove referenced projects - When allowed, member can add and remove referenced projects.
Project configuration	 The functions member can/cannot perform in Visual Paradigm. Stereotypes (Project-based) - When allowed, member can add, edit and remove stereotypes in projects. D efault tagged values - When allowed, member can define default tagged values for any type of model elements. Requirement types - When allowed, member can add, edit and remove requirement types. Viewpoints - When checked, member can add, edit and remove viewpoints and stakeholders. User story statuses - When allowed, member can add. edit and remove user story statuses. Project management lookups - When allowed, member can modify the lookup values for project management properties (e.g. phase, iteration, version, etc). Business rule keywords - When allowed, member can add, edit and remove business rule keywords. Design pattern - When allowed, member can synchronize with server the local changes made to design patterns.

	element templates. Task pool statuses - When allowed, member can configure task pool statuses in Tasifier.
Tag/Branch	The functions member can/cannot perform in Visual Paradigm. Create tag - When allowed, member can produce tags from teamwork project. Create branch - When allowed, member can produce branches from teamwork project. Merge branch - When allowed, member can merge changes made in branch to trunk, or the other way round. Delete branch - When allowed, member can delete any branch.

.

. . .

Options available when adding member

- 8. Click **Save** at the top right of page.
- 9. If you have already added project, you can assign this member to project(s), too. Open the **Projects** tab. Click **Add Project** and press + on the project(s) that the member will involve. Click **Close**.
- 10. Decide whether he can read and/or commit changes made in the project. Read access enables opening the project from server and reading its content. Commit enables uploading project changes from client to server. This step is optional and you can assign member to project in project management page later on.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Visual Paradigm Online LDAP Authentication

Visual Paradigm Online ("VP Online") supports two ways of authentication - built-in authentication and directory server authentication. While the builtin authentication allows you to easily set up and manage member accounts completely inside VP Online, active server authentication allows users to login to VP Online with credentials stored in and managed by a directory server.

In order for directory server authentication to work, administrator has to install a utility called DS Connector, and have it configured to connect both VP Online and the directory server. DS Connector acts as bridge between VP Online and directory server. It's capable to synchronize user listing from directory server to VP Online, and to manage the authentication from Visual Paradigm to directory server, through VP Online.

In this page, you will learn how to work with LDAP authentication from creating users in Apache Directory Studio to installing and configuring DS Connector. If you are interested in working with user group instead of user, please read Visual Paradigm Online LDAP Authentication (Groups). If you are interested in Active Directory Authentication, please read Visual Paradigm Online Active Directory Authentication.

There are series of steps you need to take in order to make LDAP authentication works. Please read through all the steps below without skipping any of them, even if you are familiar with LDAP and Apache Directory Studio.

Step 1 - Creating user account in ApacheDS

In this section you will learn how to create user account in ApacheDS using Apache Directory Studio. It's mainly written for people who are not familiar with ApacheDS. However, even if you are familiar with ApacheDS, be sure to read through the steps as some of the settings will influence the authentication process.

- 1. In LDAP Browser, navigate to the **ou=users** node under **DIT > Root DSE > ou=system**.
- 2. Right click on the **ou=users** node in and select **New Entry...** from the popup menu.

LDAP Browser		🗎 ou=users,	ou=s	ystem 🛿		
	🍳 🤣 🖻 🔄 🏹	DN: ou=users	,ou=	system		
▼ = ▼	- 🔒 😥	Attribute De	script	ion	Value	
a ta DIT	objectClass objectClass			organizationalUnit (st top (abstract)		
A Root DSE (5)						
b W dc=example,	dc=com	ou		users		
b & ou=config						
b & ou=schema						
a 🔏 ou=system (6						
👃 ou=users						
⊳ 🖧 ou=conf	New	•	<u></u>	New Entry		
b & ou=cons	Open Entry		<u> </u>	New Context Ent	ry	
A prefNode	Open With	•	A	New Search	Ctrl+H	
b ¹ / ₂ uid=adm ¹ / ₂ Show in DIT		F3	P	New Bookmark	. –	
Bookmarks	Go to DN		P New Batch Ope		ration	
	👰 Up	F4	-			
	Copy Entry / DN	Ctrl+C	F			

Adding a new entry via LDAP Browser

- 3. In the New Entry window, keep Create entry from scratch selected and click Next.
- 4. You are prompted to enter one structural object for creating the new user. Select inetOrgPerson as the object class

New Entry					
Object Classes Please select object classes of the entry. Select at least one structural object class.					
Available object classes	Selected object classes				
Selected inetOraPer	rson				

5. Click Add to add inetOrgPerson to the list of selected object classes. You will see a list the object classes from the inetOrgPerson object hierarchy are being added automatically.

New Entry						
Object Classes Please select object classes of the entry. Select at least one structural object class.						
Available object classes Selected object classes						
accessControlSubentry accessControlSubentry accessControlSubentry accessControlSubentry accessControlSubentry ads-authenticatorIntercep A ads-authenticatorImpl A ads-authenticatorImpl A ads-base ads-authenticatorImpl A ads-base ads-changePasswordServer Gs ads-changePasswordServer Gs ads-delegatingAuthenticat Gs ads-delegatingAuthenticat Gs ads-delegatingAuthenticat Gs ads-delegatingAuthenticat Gs ads-delegatingAuthenticat	Add Remove	G₅ inetOrgPerson G₅ organizationalPerso G₅ person GA top	n			

inetOrgPerson added to the list of selected object classes

- 6. Click Next.
- 7. For **RDN**, enter *uid=jdoe*, where *jdoe* is a unique shortname of the user you want to add now.

ĺ	👔 New Entry	,	
	Distinguish Please selec	red Name t the parent of the new entry and enter the RDN.	
	Parent:	ou=users,ou=system 🗸	Br <u>o</u> wse
	RDN:	uid 🔻 = jdoe	+ -
	DN Preview:	uid=jdoe, ou= users, ou= system	
		RDN entered	

8. Click Next.

- 9. Fill in the attributes for *jdoe*. Enter *John Doe* as *cn*.
- 10. Enter Doe as sn.

New Entry						
Attributes Please enter the attributes for the entry. Enter at least the MUST attributes.						
DN: uid=jdoe,ou=users,ou=syste	em 🖻 🖹 🗎 💥 🚔 🗍 🏥 🎽					
Attribute Description	Value					
objectClass	inetOrgPerson (structural)					
objectClass	organizationalPerson (structural)					
objectClass	person (structural)					
objectClass	top (abstract)					
cn	John Doe					
sn	Doe					
uid	jdoe					

cn and sn specified

11. You can optionally add more attributes for this user. In particular, you may want to supply an email for this user. Doing so allows this user to login to VP Online by entering his/her email address. Without supplying an email, he/she will need to login by entering string like *uid=jdoe,ou=users,ou=system* as username. If you want to add the **mail** attribute, click **New Attribute...** on top of the table, on the right hand side. Then, add and fill in the **mail** attribute. (note: Make sure you've selected the **mail** attribute, not **email/emailAddress**)

12. Create a password for this user. Click on **New Attribute...** as shown in the image below. By the way, be sure to set password for users who will use Visual Paradigm. Users without password won't be able to access the VP Online.

New Entry				X		
Attributes				7		
Please enter the attributes for the entr	Please enter the attributes for the entry. Enter at least the MUST attributes.					
DN: uid=jdoe,ou=users,ou=system		₽₹	× 🖗	⇒		
Attribute Description	Value	NS				
C	reate an attribute					

13. In the New Attribute window, select userPassword as Attribute Type.

New Attribu	te	
Attribute Typ	e	
Please enter o	r select the attribute type.	
Attribute type:	userPassword	
	Show subschema attributes only	
	Hide existing attributes	

Selected userPassword as attribute type

14. Click Finish.

15. Enter the password and click **OK**.

Password Editor	- sta		×
New Password			
Enter New Password:	•••••		
Select Hash Method:	Plaintext		•
Password Preview:	•••••		
	Password (Hex):		
New Salt	Salt (Hex):		
	Show new pas	ssword details	

Password entered

16. Click Finish.

Step 2 - Downloading DS Connector from VP Online

DS Connector acts as a bridge between VP Online and directory server. In this section you will see how to download DS Connector from VP Online.

- 1. Open a web browser.
- 2. Visit and login your cloud entry point.
- 3. Select **System Tools** from the menu on the left hand side.
- 4. Open the tab **Single Sign-On**.
- 5. Click on **Configure** under the section **Directory Service Connector**.

System	System Info	Single Sign-On		
Directory	Service Connect	or		
Click the Co	nfigure button to setu	p the DS Connector.		Configure
Configura	re SAML 2.0			
Identity Prov	ider (IDP) Name:			

To configure directory service connector

6. Choose the operating system for the machine where Active Directory is installed.

Configure Directory Services Connector					
1.	Download, install and configur	The DS connector in the directory server machine.			
2.	Windows (32bit) Windows (64bit) Linux (32bit) Linux (64bit) Mac OS X (with JRE) Mac OS X	Your connector Dk2123S7 11-24 15:16			
l	Mac 03 A	ОК			

Choosing the right operating system

7. Click **Download**. Keep the dialog box opened as you will need to copy the key presented in the dialog box when you configure DS Connector in the next section.

Step 3 - Installing and configuring DS Connector

In this section you will install DS Connector, and configure it to make it connect to both VP Online and ApacheDS.

- 1. Copy the downloaded zip file to the machine where ApacheDS is installed.
- 2. Extract the zip file to a folder.

Com	puter + Local Disk (C:) + Tools +			
Organize 👻 Includ	le in library 🔻 Share with 👻 New	folder		
🔆 Favorites	Name	Date modified	Туре	Si
iii Libraries E Documents III Music	DS_Connector_12.1	4/23/2015 7:37 PM	File folder	

DS Connector (zip) extracted

3. Open an elevated command prompt.

For Windows Server 2008 users, click the **Start** button, type **cmd**, and then right-click **Command Prompt** and select **Run as administrator** from the popup menu.

For Windows Server 2012 users, search cmd in the Apps screen, and then right-click Command Prompt and select Run as administrator at the bottom of the screen.



- 4. Navigate to DS_Connector_12.1\service where DS_Connector_12.1 is the name of the folder extracted.
- 5. Type the following command to install DS Connector as service: install_service.bat



- 6. Run **DS_Connector_12.1\DSConnectorUI.exe**. Please run it as administrator to avoid any potential issues caused by insufficient write permission.
- 7. When you run DS Connector the first time, you are prompted to configure the connection to VP Online/Teamwork Server. In the **Configure** Server window, keep **VPository** selected.

Configure Server		×
Cloud entry point:	https://	.vpository.com
Key:		
Use proxy		
Other		Connect Cancel

Configure Server window

- 8. Fill in the cloud entry point.
- 9. Enter the key, which is the code you saw in the end of the previous section. If you have accidentally closed that dialog box, or if the key has expired, don't worry, just click **Configure** again (step 4 of the previous section) to obtain another key.

Configure Server	×
Cloud entry point: https://demo-vp	.vpository.com
Key: kjb67as932Bcks12390uNK68asdv23KLasdnklc	
Use proxy	
Other	Connect Cancel

Entering key for server configuration

- 10. Click Connect. If succeed, you should see the message Server configuration succeed.
- 11. DS Connector is now connected to VP Online. Now, you need to configure the connection to ApacheDS. On the left hand side of the DS Connector Console, click Add Directory Server.

N Connector Co	nsole				
Directory Server					
Directory Servers			Users/Groups	Add	
Name Add Directory S	Host erver	Enable]	Remove	
		T			

To add a directory server

12. Select ApacheDS as Directory Server.

onfigure Director		
Directory Server:	Active Directory	
Name:	389 389 Directory Server	
	Active Directory	
Host:	🖗 Apache DS	Port: 389
Bind DN or User:	📮 Generic 🛛 😽	
	Copen LDAP	
Password:	Univention	Secure Connection
Use proxy		
Test Connectio	n	Save Cancel

Selecting ApacheDS

13. Enter a name for this configuration.

- 14. Enter the host name and port of the ApacheDS. As we suggested you to install DS Connector on the machine where ApacheDS is installed, your host name is pretty likely to be localhost or 127.0.0.1. Regarding the port, while the default port of ApacheDS is 10389, you may need to confirm it with your administrator in case it has been changed.
- 15. Enter **Bind DN or User**. If you use Apache Directory Studio, you can obtain the required value by right clicking on the LDAP connection and selecting **Properties** from the popup menu. The Bind DN or user can be found under the **Authentication** tab.

b g uid=somin	Properties for "AdminCon	inection"
Bookmarks	type filter text	Connection 🔅 👻 🔿 👻 💌
Connections @ LDAP Servers	b Connection	Network Parameter Authentication Browser Options Edit Options Authentication Simple Authentication • Authentication Parameter • • Bind DN or user uids admin,ou=system • Bind password • •
AdminConnection		SASL Settings Kerberos Settings

Obtaining the Bind DN or user from Apache Directory Studio

16. Enter the password for logging into ApacheDS.

Configure Director	y Server	×
Directory Server:	Apache DS 🔹	
Name:	Apache DS Connection	
Host:	127.0.0.1	Port: 10389
Bind DN or User:	uid=admin,ou=system	
Password:	•••••	Secure Connection
Use proxy		
Test Connectio	n	Save Cancel

Configuring ApacheDS connection

17. Click Test Connection. If succeed, you should see the message Test connection succeed.

18. Click Save in the Configure Directory Server window.

19. The newly configured directory server is listed on the left hand side of the **DS Connector Console**. If necessary you can add more directory servers by repeating from step 11 until this step.

S DS Connector Console		- 5.00		- 0 X
Directory Server				
Directory Servers			Users/Groups	Add
Name	Host	Enable		
Apache DS Connection	127.0.0.1			Remove
			1	
		Directory s	server added	

Step 4 - Synchronizing users to VP Online

In this section you will add users into DS Connector Console to let it synchronize the users to VP Online. When you finished this section, the chosen users can login VP Online from Visual Paradigm, using the login details managed by ApacheDS.

1. Select the directory server in **DS Connector Console**.

🔝 DS Connector Console		- 5.00
Directory Server		
Directory Servers		
Name	Host	Enable
Apache DS Connection	127.0.0.1	V
	3	
1		
Select	ting a directory server	

- 2. On the right hand side, click Add.
- 3. In the Add users/group window, select the user(s) to be made available on VP Online. The selected users will become members of VP Online , and will have access to Visual Paradigm projects.

Add users/groups	×
Apache DS Connection (127.0.0.1)	
🗐 🖳 🔚 config	
🗄 🖳 🌍 example	
🗄 🖳 📇 schema	
🚊 🖳 🔚 system	
🖶 🔲 📇 configuration	
🖶 🖳 📇 consumers	
🖶 🔲 🛃 groups	
🖶 🔲 📇 users	
🔽 🖁 jdoe	
wong	
🔤 🚰 🏧 🔤	

Select users to add to DS Connector Console

4. Click Add.

5. That's it. You can see the selected users listed on the right hand side of the DS Connector Console.

	E	
Users/Groups		Add
jim 🖁 jdoe		Adu
Users/Groups		Remove

Users added to DS Connector Console

The name and login ID of the selected users will be synchronized to VP Online shortly (~1 minute). Once the synchronization has been completed, you will see the users available in the **Members** page of the VP Online. Note that the synchronization will synchronize only the user name and login ID. It will not synchronize nor to process any password of any users in ApacheDS. Whenever a user tries to login to VP Online from Visual Paradigm, VP Online will communicate with ApacheDS for authentication.

Members	Groups					
New Mem	ber				Show active members only	۹
Me:	mbers		Projects	Last Login	n Status	
🔲 jdo	e		0	-	Active	
mw	ong		0	-	Active	

Users synchronized from ApacheDS

So now, you assign the users to projects so that they can open the project from Visual Paradigm and start working. If necessary you can also grant them admin permissions.

To login VP Online from Visual Paradigm, please enter the **Email (Login ID)** of member as **Email** (not the display name), and the password stored in ApacheDS as **Password**.

😵 Teamwork Client		×
	Hello World Company	
Cloud entry point	https://	
Email:	Email: uid=jdoe,ou=users,ou=system	
Password:	•••••	
	Remember password	
Use proxy		
	Login Cancel	

Login from Visual Paradigm

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Visual Paradigm Online Active Directory Authentication

Visual Paradigm Online ("VP Online") supports two ways of authentication - built-in authentication and directory server authentication. While the builtin authentication allows you to easily set up and manage member accounts completely inside VP Online, active server authentication allows users to login to VP Online with credentials stored in and managed by a directory server.

In order for directory server authentication to work, administrator has to install a utility called DS Connector, and have it configured to connect both VP Online and the directory server. DS Connector acts as bridge between VP Online and directory server. It's capable to synchronize user listing from directory server to VP Online, and to manage the authentication from Visual Paradigm to directory server, through VP Online.

In this page, you will learn how to work with Active Directory authentication from creating users in Apache Directory Studio to installing and configuring DS Connector. If you are interested in working with user group instead of user, please read Visual Paradigm Online Active Directory Authentication (Groups). If you are interested in LDAP Authentication, please read VP Online LDAP Authentication.

There are series of steps you need to take in order to make Active Directory authentication works. Please read through all the steps below without skipping any of them, even if you are familiar with Active Directory.

Step 1 - Creating organization unit and user in Active Directory

- 1. Start the Server Manager in Windows Server.
- 2. Click on **Tools** at top right and select **Active Directory Administrative Center** from the popup menu.

🛛 🕝 🚩 Manage	Tools View Help
	Active Directory Administrative Center
	Active Directory Domains and Trusts
	Active Directory Module for Windows PowerShell
	Active Directory Sites and Services
Never	Active Directory Users and Computers
Not configured Never	ADSI Edit

Open Active Directory Administrative Center

3. Select your domain from the list on the left hand side.

8			
€ Active Directory Administrative Ce 			
Active Directory <	TE	STMCH (local) (13)	
E	Fil	ter	۱) م
Overview			
TESTMCH (local)		Name	Туре
Dynamic Access Control		Builtin	builtinDom
🔎 Global Search	Ē	Computers	Container
	-1	Domain Controllers	Organizati
	î.	ForeignSecurityPrincipals	Container
		Infrastructure	infrastructu
S	Select	domain	

4. Create an Organizational Unit to house your corporate users. On the right navigation pane under **Task > <domain name>** click on **New** and then select **Organizational Unit**.

_ □)	C	a " _ M = = 1.3
🕶 🗭 Manage Help		
Tasks		
<u>ن</u>		
Builtin	^	지도 말을 받을 수를
New	۲	
Delete		
Search under this node		
Properties		
TESTMCH (local)	^	
Change domain controller		
Raise the forest functional leve		요즘 도 승리는 것
Raise the domain functional le		
Enable Recycle Bin		
New	•	Group
Search under this node		Computer
Properties		User
		InetOrgPerson
	[Organizational Unit

Create Organizational Unit

5. Organizational unit is like a company. Enter the mandatory details and click **OK**.

Organizational Unit	Organizational	Unit		(20	
Managed By	Name: Address: Street	* Hello World C	ompany	Create in: DC=TESTMCH,DC=LOCAL Change- Description:	Create in: DC=TESTMCH,DC=LOCAL Change Description:	
	City Country/Region:	State/Province	Zip/Postal code	Protect from accidental deletion		
	Managed By				(
	Managed by:		Edit Cle	lear Office:		
	Phone numbers: Main:			Address:		
	Mobile			Street		
	Fax:			City State/Province Zip/Postal cod	le	
				Country/Region:		



6. This will immediately create the **Organizational Unit** in the designated location. Double click on your newly created **Organizational Unit**.

		Name	Туре	Description	
i		ForeignSecurityPrincipals	Container	Default container for secur	^
		Hello World Company	Organizati		
		Infrastructure	infrastructu		
i	-	LostAndFound	lostAndFou	Default container for orph	
i	-	Managed Service Accounts	Container	Default container for man	
i	-	NTDS Quotas	msDS-Quo	Quota specifications conta	=
1		Program Data	Container	Default location for storag	
i		System	Container	Builtin system settings	
i		TPM Devices	msTPM-Inf		~

Double click on an Organization Unit to edit it

7. On the right navigation pane, click on **New**, and then select **User** from the popup menu.

\odot	Tasks	
	New 🔸	Group
	Delete	Computer
	Move	User
	Search under this node	InetOrgPerson
	Properties	Organizational Unit
	Create user	

8. Enter the mandatory details such as user's name.

Account	Account		×
Irganization Aember Of lassword Settings Irofile	First name: Peter Middle initials:	Account expires: End of Password options: User must change password at next log on Other password options Smart card is required for interactive log on Password never expires User cannot change password Encryption options: Other options:	•

Filling in the User screen

9. Enter the password for the user.

10. Change the **Password options** to **Other password options**. If you don't do this, you won't be able to login with this user account from Visual Paradigm products.

Account expires:	Never End of	
Password options: O User must change pas O Other password optio		•
Smart card is requi		
Encryption options:		•
Other options:		•

Change to Other password options

11. Click **OK**. Repeat step 7 to step 10 to create all users in Active Directory.

Step 2 - Downloading DS Connector from VP Online

DS Connector acts as a bridge between VP Online and directory server. In this section you will see how to download DS Connector from VP Online.

- 1. Open a web browser.
- 2. Visit and login your cloud entry point.
- 3. Select **System Tools** from the menu on the left hand side.
- 4. Open the tab **Single Sign-On**.
- 5. Click on **Configure** under the section **Directory Service Connector**.

System System Info Single Sign-On			
Directory Service Connector			
Click the Configure button to setup the DS Connector.			
Configurare SAML 2.0			
Identity Provider (IDP) Name:			

To configure directory service connector

6. Choose the operating system for the machine where Active Directory is installed.

Confi	Configure Directory Services Connector				
1. [Download, install and configu Windows (32bit)	The the DS connector in the directory server machine.			
2.	Windows (32bit) Windows (64bit)	your connector 2kxg9M255d			
	Linux (32bit) Linux (64bit) Mac OS X (with JRE) Mac OS X	11-24 14:40			
l	Mac CO X	ОК			

Choosing the right operating system

7. Click **Download**. Keep the dialog box opened as you will need to copy the key presented in the dialog box when you configure DS Connector in the next section.

Step 3 - Installing and configuring DS Connector

In this section you will install DS Connector, and configure it to make it connect to both VP Online and Active Directory.

- 1. Copy the downloaded zip file to the machine where Active Directory is installed.
- 2. Extract the zip file to a folder.



DS Connector (zip) extracted

3. Open an elevated command prompt.

For Windows Server 2008 users, click the **Start** button, type **cmd**, and then right-click **Command Prompt** and select **Run as administrator** from the popup menu.

For Windows Server 2012 users, search cmd in the Apps screen, and then right-click Command Prompt and select Run as administrator at the bottom of the screen.



Run elevated command prompt

- 4. Navigate to DS_Connector_12.1\service where DS_Connector_12.1 is the name of the folder extracted.
- 5. Type the following command to install DS Connector as service:



Installing DS Connector as system service

- Run DS_Connector_12.1\DSConnectorUI.exe. Please run it as administrator to avoid any potential issues caused by insufficient write permission.
- 7. When you run DS Connector the first time, you are prompted to configure the connection to VP Online/Teamwork Server. In the **Configure** Server window, keep VP Online selected.

		Configure Server		x
Cloud entry point:	https://			.vpository.com
Key:				
Use proxy Other			Conne	ct Cancel

To configure connection to VP Online

- 8. Fill in the cloud entry point.
- 9. Enter the key, which is the code you saw in the end of the previous section. If you have accidentally closed that dialog box, or if the key has expired, don't worry, just click **Configure** again (step 4 of the previous section) to obtain another key.

	Configure Server	x
Host:	192.168.5.106	Port: 1999
Key:	4C64L5wUZB9mE5N8459H4P2kxg9M255d	
Use proxy Other		Connect Cancel

Entering key for server configuration

- 10. Click Connect. If succeed, you should see the message Server configuration succeed.
- 11. DS Connector is now connected to VP Online. Now, you need to configure the connection to Active Directory. On the left hand side of the DS Connector Console, click Add Directory Server.

3		DS Con	nector Console	_ D X
Directory Server				
Directory Servers			Users/Groups	Add
Name Add Directory S	Host	Enable]	Remove
		To add a	directory server	

12. Select Active Directory as Directory Server.

	Configure	Directory Server	×
Directory Server:	Active Directory	¥	
Name:			
Host:			Port: 389
Bind DN or User:			
Password:			Secure Connection
Use proxy			
Test Connectio	n		Save Cancel

Selecting Active Directory

- 13. Enter a name for this configuration.
- 14. Enter the host name and port of the Active Directory. As we suggested you to install DS Connector on the machine where Active Directory is installed, your host name is pretty likely to be localhost or 127.0.0.1. Regarding the port, while the default port of Active Directory is 389, you may need to confirm it with your administrator in case it has been changed.
- 15. Enter Bind DN or User. You can check the required value from the Account details page of the administrator user. The value of User SamAccountName is the value you need to enter now.

		_ _ ×
John		TASKS ▼ SECTIONS ▼
Account	Account	• ● ●
Organization Member Of Password Settings Profile	er e	Account expires:
Extensions	User SamAccountNam TESTMCH \V \V John	Smart card is required for interactive log on Password never expires User cannot change password
		Encryption options: Other options:

Obtaining the Bind DN or user

16. Enter the password for logging into Active Directory.

	Configure Directory Server	×
Directory Server:	Active Directory	
Name:	Active Directory Connection	
Host:	127.0.0.1 Port: 389	
Bind DN or User:	TESTMCH\John	
Password:	Secure Co	onnection
Use proxy		
Test Connectio	Save	Cancel

Configuring Active Directory connection

- 17. Click Test Connection. If succeed, you should see the message Test connection succeed.
- 18. Click Save in the Configure Directory Server window.
- 19. The newly configured directory server is listed on the left hand side of the **DS Connector Console**. If necessary you can add more directory servers by repeating from step 11 until this step.

2		DS Conn	ector Console	- 1	•)	¢
Directory Server							
Directory Servers			Users/Groups	5	Δ.	dd	
Name	Host	Enable					
Active Directory Connection	127.0.0.1			L	Ren	nove	

Step 4 - Synchronizing users to VP Online

In this section you will add users into DS Connector Console to let it synchronize the users to VP Online. When you finished this section, the chosen users can login VP Online from Visual Paradigm, using the login details managed by Active Directory.

1. Select the directory server in **DS Connector Console**.

2		DS Conn
Directory Server		
Directory Servers		
Name	Host	Enable
Active Directory Connection	127.0.0.1	✓
	ht	

Selecting a directory server

- 2. On the right hand side, click Add.
- 3. In the Add users/group window, select the user(s) to be made available on VP Online. The selected users will become members of VP Online, and will have access to Visual Paradigm projects.

•	Add users/groups	x
	Active Directory Connection (127.0.0.1)	
	🗐 🖳 🔛 Domain Controllers	
	🖮 🔲 🔡 Hello World Company	
	···· 🖳 🚨 Peter	
	Computers Peter (Peter) rityPrincipals	
	🖽 🖳 📷 Managed Service Accounts	
	Select users to add to DS Connector Console	

- 4. Click Add.
- 5. That's it. You can see the selected users listed on the right hand side of the DS Connector Console.

ector Console	_ 🗆 X
Users/Groups	Add
& Peter	Remove

Users added to DS Connector Console

The name and login ID of the selected users will be synchronized VP Online shortly (~1 minute). Once the synchronization has been completed, you will see the users available in the **Members** page of VP Online. Note that the synchronization will synchronize only the user name and login ID. It will not synchronize nor to process any password of any users in Active Directory. Whenever a user tries to login to VP Online from Visual Paradigm, VP Online will communicate with Active Directory for authentication.

Members						
New Memb	ber			*	Show active members only	٩
Mer	nbers	Projec	cts Last L	ogin	Status	
Pete	er	0	-		Active	

Users synchronized from Active Directory

So now, you assign the users to projects so that they can open the project from Visual Paradigm and start working. If necessary you can also

grant them admin permissions. To login VP Online from Visual Paradigm, please enter the **Email(Login ID)** as shown in the image above as **Email**, and the password stored in Active Directory as Password.

٩	Teamwork Client		\times
		Hello World Company	
	Cloud entry point:	https://	
	Email:	Peter	
	Password:	•••••	
		Remember password	
	Use proxy		
		Login Cancel	

Login from Visual Paradigm

Related Resources

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Setting up Visual Paradigm Online with Okta

Visual Paradigm Online ("VP Online") supports Okta for Enterprise clients. In this article we will go into the details of setting up SAML authentication through Okta. Although this is specific to Okta the concepts could be adapted to any other SAML Identity Provider.

Step 1 - Setting up Okta

In this section you will learn how to create a new application integration in Okta.

- 1. Part of the setup of Okta requires providing details given by VP Online. So now, open a web browser and login VP Online as manager.
- 2. Click on your logo at the top right of the page and then select Administration from the drop down menu.
- 3. Select **System Tools** from the menu on the left hand side.
- 4. Open the **Single Sign-On** tab and keep it opened. We will come back later.

System Single Sign-O	Disk Usage		
Directory Service Connect	tor		
Click the Configure button to setup the DS Connector.			
Configurare SAML 2.0			
Identity Provider (IDP) Name:			
IDP metadata:	Choose File No file chosen		
Single Sign-on (ACS) URL:	https:// /saml2/service/		
Audience URI (SP Entity ID):	https://		
Start URL:	https://		

The Single Sign-On page of VP Online

- 5. Open another tab/window in the web browser and visit Okta.
- 6. Create a new application integration in Okta. Select SAML 2.0 as sign-on method.

Create a New Application Integration		×
Sign on method	 Secure Web Authentication (SWA) Users credentials to sign in. This integration works with most apps. 	
	 SAML 2.0 Uses the SAML protocol to log users into the app. This is a better option than SWA, if the app supports it. 	
	Create Cancel	

Creating an application with SAML 2.0 as sign on method

7. Enter VPository as the name of application. Click Next.

App name	VPository	
App logo(optional) 🛞	Ø	
		Browse
	Upload Logo	
App visibility	Do not display application icon to users	
	Do not display application icon in the Okta Mob	lle app

Entering application name

8. Fill-in the SAML settings. Copy the value of **Single Sign-on (ASC) URL** from VP Online to Okta as the **Single sign on URL**, and then copy the value of **Audience URI (SP Entity ID)** from VP Online to Okta.

Configurare SAML 2.0			
dentity Provider (IDP) Name:		GENERAL	
DP metadata:	Choose File No file chosen		
Single Sign-on (ACS) URL:	https://	Single sign on URL	https:// /saml2/service/
Audience URI (SP Entity ID):	https://		Use this for Recipient URL and Destination URL
Start URL:	https://	Audience URI (SP Entity ID) 🔘	https://
	(VPository)	Default RelayState 🔘	
			if no value is set, a blank RelayState is sent
		Name ID format 🚳	Unspecified •
		Application username	Okta username v
			Show Advanced Settings

Filling in SAML settings

- 9. Click Next.
- 10. Select I'm an Okta customer adding an internal app and then click Finish.

	 I'm an Okta customer adding an internal app I'm a software vendor. I'd like to integrate my app with Okta
The optional questions be	low assist Okta Support in understanding your app integration.
App type 📵	This is an internal app that we have created
Contact app vendor	It's required to contact the vendor to enable SAML
Which app pages did you consult	
	to configure SAML? ages are, or anything else you think is helpful
	ages are, or anything else you think is helpful
Enter links, describe where the p	ages are, or anything else you think is helpful
Enter links, describe where the p Did you find SAML docs for this ap Enter any links here	ages are, or anything else you think is helpful
Enter links, describe where the p	ages are, or anything else you think is helpful

Choosing identity

11. Download the Identity Provider metadata under the Sign On tab.

ettings	Edit
SIGN ON METHODS	
The sign-on method determines how on methods require additional config	a user signs into and manages their credentials for an application. Some sign- uration in the 3rd party application.
SAML 2.0	
Default Relay State	
View Setup Instruction	red until you complete the setup Instructions. s ta is available if this application supports dynamic configuration.
View Setup Instruction	s
View Setup Instruction	s

Download Identity Provider metadata

12. Open the **People** tab.

General

Sign On

Import

People

13. Click **Assign to People** and then assign the application to people who will use VP Online. Doing so does not instantly grant those people the accessibility to VP Online. You still have to go through the process of inviting them to VP Online, which will be mentioned in the next section.

Assign VPository to People	×
Q Search	
Derek derek@demo-vp.com	Assign
Holly holly@demo-vp.com	Assign
Andrew andrew@demo-vp.com	Assign

	Done
Assigning VPository (application) to people	

14. Click **Done** when finished.

Step 2 - Setting up VP Online

1. Go back to VP Online. You should be opening the Single Sign-On tab of the System Tools page. Now, enter Okta as the Identity Provider (IDP) Name.
| System Tools | |
|-----------------------------------|--------------------------------|
| System Single Sign-C | n Disk Usage |
| Directory Service Connec | tor |
| Click the Configure button to set | up the DS Connector. Configure |
| Configurare SAML 2.0 | |
| Identity Provider (IDP) Name: | Okta |
| IDP metadata: | Choose File No file chosen |
| Single Sign-on (ACS) URL: | https:// |
| Audience URI (SP Entity ID): | https:// |
| Start URL: | https:// |
| | Apply |
| 1 | IDP name entered |

2. In the IDP metadata field, upload the Identity Provider metadata file downloaded in the previous section.

Identity Provider (IDP) Name:	Okta
IDP metadata:	Choose File metadata
Single Sign-on (ACS) URL:	https://
Audience URI (SP Entity ID):	https://
Start URL:	https://

IDP metadata uploaded

- 3. Click Apply.
- 4. Click **OK** when you are prompted for confirmation. If sign-in success, you will be logged out automatically. If failed, please make sure the VPository application has been assigned to you in Okta, and try again.
- 5. From now on, VP Online is integrated with Okta. You, as the manager can access VP Online with your Okta account and perform administration and management tasks. Team members, once being invited and have accepted the invitations, can login VP Online from Visual Paradigm with their Okta account.

Login to VPosi	tory
Hello World Co	ompany
LOGIN WITH OKT/	
How to set up Visual Paradigm	Forgot your password?

Login with Okta

Step 3 - Member management

Since the integration with Okta, in order for someone to become a VP Online member, he/she has to:

- 1. Be a person who have been assigned the VP Online application in Okta and,
- 2. Have accepted the invitation sent from VP Online manager.

The first point has been covered in step 1 above. In this section we are going to show you how to invite a member.

1. Open a web browser and login VP Online as manager.

- 2. Click on your logo at the top right of the page and then select Administration from the drop down menu.
- 3. Select **Members** from the menu on the left hand side.
- 4. Under the **Members** tab, click **Invite Member**.

Members Management					
Members	Groups	Viewers			
Invite Mem	mbers				

Invite member

5. Enter the name and email of the members. Make sure you have already assigned the VPository application to them in Okta. If not, they won't be able to access any projects. Click **Send Invitation**.

You can invite your teamma	ate(s) to work on this project by providing his/her name and
-	vill send invitation email to your teammate(s).
	ept and start working on your project within 10 minutes. After d your invitation, you will receive a notification email.
Name:	Email:
Holly	holly@demo-vp.com X
Andrew	andrew@demo-vp.com +

Send invitation

6. The invitee will receive an invitation shortly. Click on the activation link in the email.

Visual 💊 Paradigm
VPository Collaborative Visual Modeling Platform in the Cloud
Hi Holly ,
(https://company (https://company VPository for Hello World Company vPository for Hello World Company account.
Activate your VPository Account
To activate VP Online account

7. He/she will be redirected to a web page where he/she can fill in his name. Enter the name and click Activate with Okta.

Account Activation					
Ac	Activate your VPository account				
	Cloud entry point: Repository name: Hello World Company				
	Account Information				
	All fields are required.				
Name:	Holly				
Email: holly@demo-vp.com					
Activate with Okta					

Activating VP Online account

If success, he will see the **Congratulations** screen. From now on, he/she can access VP Online from Visual Paradigm with his/her Okta account.

Completed			
Congratulations!			
Your VPository account has been activated successfully.			
What is next?			
<u>How to Set Up</u>			
Activation success			

Related Resources

- User's Guide: Setting up VP Online with Azure
- Visual Paradigm on YouTube
- <u>Contact us if you need any help or have any suggestion</u>

Setting up Visual Paradigm Online with Microsoft Azure

Visual Paradigm Online ("VP Online") supports Microsoft Azure for Enterprise clients. In this article we will go into the details of setting up SAML authentication through Microsoft Azure. Although this is specific to Microsoft Azure the concepts could be adapted to any other SAML Identity Provider.

Step 1 - Setting up Microsoft Azure

In this section you will learn how to create a new application integration in Microsoft Azure.

- 1. Part of the setup of Microsoft Azure requires providing details given by VP Online. So now, open a web browser and login VP Online as manager.
- 2. Click on your logo at the top right of the page and then select Administration from the drop down menu.
- 3. Select **System Tools** from the menu on the left hand side.
- 4. Open the **Single Sign-On** tab and keep it opened. We will come back later.

System	System info	Single Sign-On	Disk Usage			
Directory Service Connector						
Click the Configure button to setup the DS Connector.						
Configura	re SAML 2.0					
Identity Prov	ider (IDP) Name:					
IDP metadat	a:	Choose File No file c	hosen			
Single Sign-	on (ACS) URL:	/s	aml2/service/			
Audience UF	RI (SP Entity ID):	/s	aml2/			
Start URL:						

The Single Sign-On page of VP Online

- 5. Open another tab/window in the web browser and visit Microsoft Azure.
- 6. Create a new application in Azure. Name it VPository. Click Next.

ADD APPLICATION	×	
Tell us about your application		
NAME		
VPository		
Туре		
WEB APPLICATION AND/OR WEB API NATIVE CLIENT APPLICATION		
	(\rightarrow)	2
Creating application VPository		

7. Fill-in the App properties. Copy the value of Single Sign-on (ASC) URL from VP Online to Microsoft Azure as the SIGN-ON URL, and then copy the value of Audience URI (SP Entity ID) from VP Online to Azure as APP ID URL.



- 8. Click Complete.
- 9. Click VIEW ENDPOINTS at the bottom of the screen.



10. Copy the URL of FEDERATION METADATA DOCUMENT. Visit the URL and save the XML content to a new file.

App Endpoints	
If you are developing an app that integrates with Microsoft Azure AD, update your code to use these endpoints for single sign-on and directory access.	
FEDERATION METADATA DOCUMENT	
https://login.microsoftonline.com/deb56257-406d-42db-ae87-f0e2546	Ē
WS-FEDERATION SIGN-ON ENDPOINT	
https://login.microsoftonline.com/deb56257-406d-42db-ae87-f0e2546	Ē.
SAML-P SIGN-ON ENDPOINT 🕜	
https://login.microsoftonline.com/deb56257-406d-42db-ae87-f0e2546	Ē.
SAML-P SIGN-OUT ENDPOINT 🕜	
https://login.microsoftonline.com/deb56257-406d-42db-ae87-f0e2546	Ī.
MICROSOFT AZURE AD GRAPH API ENDPOINT 🕜	
https://graph.windows.net/deb56257-406d-42db-ae87-f0e2546a57e5	Ĩ.
OAUTH 2.0 TOKEN ENDPOINT	
https://login.microsoftonline.com/deb56257-406d-42db-ae87-f0e2546	Ē.
OAUTH 2.0 AUTHORIZATION ENDPOINT	
https://login.microsoftonline.com/deb56257-406d-42db-ae87-f0e2546	Ē.

To open the URL of metadata

11. Open the **CONFIGURE** page.



12. Choose Yes for the option USER ASSIGNMENT REQUIRED TO ACCESS APP.

USER ASSIGNMENT REQUIRED TO ACCESS APP

14.



Enable the requirement of user assignment to acces app

13. Click **SAVE** at the bottom of the screen to save the changes.



User assignments are required to acc

Opening Users and Groups page

15. Select the person who will use VP Online.

Office 365 N



16. Click **ASSIGN** at the bottom of the screen. Select **YES** for confirmation. Note that the assignment does not instantly grant this person accessibility to VP Online . You still have to go through the process of inviting him/her to VP Online, which will be mentioned in the next section.



17. Repeat the assignment process on other people who need to access VP Online.

Step 2 - Setting up VP Online

1. Go back to VP Online. You should be opening the **Single Sign-On** tab of the **System Tools** page. Now, enter *Azure* as the *Identity Provider* (*IDP*) *Name*.

System	System Info	Single Sign-On	Disk Usage			
Directory Service Connector						
Click the Cor	nfigure button to setu	p the DS Connector.				Configure
Configura	re SAML 2.0					
Identity Provi	ider (IDP) Name:	Azure]				
IDP metadata	a:	Choose File No file cl	hosen			
Single Sign-	on (ACS) URL:	/s	aml2/service/			
Audience UR	RI (SP Entity ID):	/s	aml2/			
Start URL:		/				
						Apply
		IDP	name entered	1		

2. In the IDP metadata field, upload the metadata file saved in the previous section.

Identity Provider (IDP) Name:	Azure
IDP metadata:	Choose File metadata.bd
Single Sign-on (ACS) URL:	/saml2/service/
Audience URI (SP Entity ID):	/saml2/
Start URL:	/

IDP metadata uploaded

- 3. Click Apply.
- 4. Click **OK** when you are prompted for confirmation. If sign-in success, you will be logged out automatically. If failed, please make sure the VPository application has been assigned to you in Microsoft Azure, and try again.
- 5. From now on, VP Online is integrated with Microsoft Azure. You, as the manager can access VP Online with your Microsoft Azure account and perform administration and management tasks. Team members, once being invited and have accepted the invitations, can login VP Online from Visual Paradigm with their Microsoft Azure account.

Login to VI	Pository
Hello World	Company
LOGIN WITH	AZURE
How to set up Visual Paradigm	Forgot your password?

Login with Microsoft Azure

Step 3 - Member management

Since the integration with Microsoft Azure, in order for someone to become a VP Online member, he/she has to:

1. Be a person who have been assigned the VPository application in Microsoft Azure and,

2. Have accepted the invitation sent from VP Online manager.

- The first point has been covered in step 1 above. In this section we are going to show you how to invite a member.
- 1. Open a web browser and login VP Online as manager.
- 2. Click on your logo at the top right of the page and then select Administration from the drop down menu.
- 3. Select **Members** from the menu on the left hand side.
- 4. Under the Members tab, click Invite Member.

/lembers Management		
Members		
Invite Mem	nber راس	
Me Me	mbers	

Invite member

5. Enter the name and email of the members. Make sure you have already assigned the VPository application to them in Microsoft Azure. If not, they won't be able to access any projects. Click **Send Invitation**.

Invite Teammate		×
You can invite your teammate(s) to work on this project by providing his/her name and email address. VPository will send invitation email to your teammate(s).		
your teammate(s) accepted yo	and start working on your project within 10 minutes. After our invitation, you will receive a notification email.	l
Name:	Email:	_
Holly	holly@demo-vp.com .	×
Andrew	andrew@demo-vp.com	+
	Send Invitation Cancel	

Send invitation

6. The invitee will receive an invitation shortly. Click on the activation link in the email.

/isual 😵 Paradigm
VPository Collaborative Visual Modeling Platform in the Cloud
Hi Holly,
(https:// company account.
Activate your VPository Account
To activate VP Online account

7. He/she will be redirected to a web page where he/she can fill in his name. Enter the name and click Activate with Azure.

Account Activation		
Activate your VPository account		
Cloud entry point: Repository name: Hello World Company		
Account Information All fields are required.		
Name:		
Email:		
Activate with Okta		
Cloud entry point: Repository name: Hell		

Activating VP Online account

If success, he will see the **Congratulations** screen. From now on, he/she can access VP Online from Visual Paradigm with his/her Microsoft Azure account.



Activation success

Related Resources

- User's Guide: Setting up VP Online with Okta
- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Managing groups

A group is a named category of members in an Visual Paradigm Online ("VP Online") account. It groups members who share the same characteristic and let them share the same project permission.

Adding group

- 1. Visit the URL of your VP Online cloud entry point through web browser.
- 2. Log in your account.
- 3. Click on your profile image at top right and select Administration from the popup menu.



Open Administration page

4. Select **Members** from the menu on the left hand side.

Management		
\$	Projects	
Ŧ	Members	J.
Open Members menu		

5. Under the Group tab, click on New Group.

6. Enter the name of group.

Members Permis	sions Projects	
Group Name: *	Developer	
Add Member		
Members		

Entering group name

- 7. Select members to add into the group. Click Add Members and then press + on the members to add into the group. Click Close when ready.
- 8. You may optionally assign the group to project(s). Open the **Projects** tab. Click **Add Project** and press + on the project(s) for assignments. Click **Close**.
- Decide whether the members in group can read and/or commit changes made in the project. Read access enables opening the project from server and reading its content. Commit enables uploading project changes from client to server. This step is optional and you can assign member to project in project management page later on.
- 10. Click Save.

Related Resources

- Visual Paradigm on YouTube
- <u>Contact us if you need any help or have any suggestion</u>

Visual Paradigm Online LDAP Authentication (Group)

Visual Paradigm Online ("VP Online") supports two ways of authentication - built-in authentication and directory server authentication. While the builtin authentication allows you to easily set up and manage member accounts completely inside VP Online, active server authentication allows users to login to VP Online with credentials stored in and managed by a directory server.

In order for directory server authentication to work, administrator has to install a utility called DS Connector, and have it configured to connect both VP Online and the directory server. DS Connector acts as bridge between VP Online and directory server. It's capable to synchronize user listing from directory server to VP Online, and to manage the authentication from Visual Paradigm to directory server, through VP Online.

In this page, you will learn how to work with LDAP authentication from creating user groups in Apache Directory Studio to installing and configuring DS Connector. If you are interested in working with user instead of user group, please read VP Online LDAP Authentication. If you are interested in Active Directory Authentication, please read Visual Paradigm Online Active Directory Authentication (Groups).

There are series of steps you need to take in order to make LDAP authentication works. Please read through all the steps below without skipping any of them, even if you are familiar with LDAP and Apache Directory Studio.

Step 1 - Creating user account in ApacheDS

In this section you will learn how to create user account in ApacheDS using Apache Directory Studio. It's mainly written for people who are not familiar with ApacheDS. However, even if you are familiar with ApacheDS, be sure to read through the steps as some of the settings will influence the authentication process.

- 1. In LDAP Browser, navigate to the ou=users node under DIT > Root DSE > ou=system.
- 2. Right click on the **ou=groups** node in and select **New Entry...** from the popup menu.



Adding a new entry via LDAP Browser

- 3. In the New Entry window, keep Create entry from scratch selected and click Next.
- 4. You are prompted to enter one structural object for creating the new user. Select groupOfUniqueNames as the object class

New Entry	
Object Classes Please select object classes of the entry. Select class.	t at least one structural object
Available object classes groupOf	Selected object classes
	dd nove
Selected group	OfUniqueNames

5. Click Add to add groupOfUniqueNames to the list of selected object classes. You will see a list the object classes from the groupOfUniqueNames object hierarchy are being added automatically.

New Entry		
Object Classes Please select object classes of the e class.	ntry. Select at least on	e structural object
Available object classes		Selected object classes
accessControlSubentry accessControlSubentry account ads-authenticationIntercep ads-authenticator ads-authenticatorImpl ads-base ads-base ads-changePasswordServer ads-delegatingAuthenticato ads-delegating	Add	€ groupOfUniqueNames € top

groupOfUniqueNames added to the list of selected object classes

- 6. Click Next.
- 7. For **RDN**, enter *cn=developer*, where *developer* is the name of group and you should supply your own group name here *developer* is just an example.

New Entry	
Distinguish Please selec	t the parent of the new entry and enter the RDN.
Parent:	ou=groups,ou=system Browse
RDN:	cn ▼ = developer + -
DN Preview:	cn=developer,ou=groups,ou=system
	DDN and and a

RDN entered

- 8. Click Next.
- 9. Add users into this group by creating multiple **uniqueMember** attributes and entering the DN of those users as attribute values. A uniqueMember attribute is default created. Enter the first user's **DN** in the **Value** cell.

New Entry		
Attributes Attribute uniqueMember has an empty value, please insert a valid value.		
DN: cn=developer,ou=groups,ou=sy	/stem 🚔 🚔 │ 🗱 💥 │ 🍰 🌣	
Attribute Description	Value	
objectClass	groupOfUniqueNames (structural)	
objectClass	top (abstract)	
cn	developer	
uniqueMember	uid=jdoe,ou=users,ou=system	

Entering the DN of a user

By the way, be sure to set password for users who will use Visual Paradigm. Users without password won't be able to access the VP Online. To set a password for a user, select the user node under **ou=users** in **LDAP Browser**. Click on **New Attribute...** in the **Entry Editor** on the right hand side. In the **New Attribute** window, select **userPassword** to be the **Attribute type**. Click **Finish**, enter the password and click **OK** to confirm. 10. Add other users by creating more **uniqueMember** attributes. To do this, right click on any attribute row in the **New Entry** window and select **New Attribute...** from the popup menu. Then enter **uniqueMember** in the **Attribute type** field in the **New Attribute** window and click **Finish**. Finally, specify the DN of that user.

New Entry				
Attributes Please enter the attributes for the entry. Enter at least the MUST attributes.				
DN: cn=developer,ou=groups,	ou=system 🚔 🚔 🗮 💥 🧩 ▽			
Attribute Description	Value			
objectClass	groupOfUniqueNames (structural)			
objectClass	top (abstract)			
cn	developer			
uniqueMember	uid=jdoe,ou=users,ou=system			
uniqueMember	uid=mwong,ou=users,ou=system			

Users added to user group

11. Click Finish.

Step 2 - Downloading DS Connector from VP Online

DS Connector acts as a bridge between VP Online and directory server. In this section you will see how to download DS Connector from VP Online.

- 1. Open a web browser.
- 2. Visit and login your cloud entry point.
- 3. Select **System Tools** from the menu on the left hand side.
- 4. Open the tab **Single Sign-On**.

5. Click on **Configure** under the section **Directory Service Connector**.

	System Info	Single Sign-On		
Directory Service Connector				
Click the Co	Click the Configure button to setup the DS Connector.			
Configurare SAML 2.0				
Identity Prov	ider (IDP) Name:			

To configure directory service connector

6. Choose the operating system for the machine where ApacheDS is installed.

Confi	Configure Directory Services Connector				
1. [Download, install and config Windows (32bit)	ure •	the DS connector in the directory server machine.		
2.	Windows (32bit) Windows (64bit) Linux (32bit) Linux (64bit) Mac OS X (with JRE)		your connector Dk2123S7 11-24 15:16		
	Mac OS X		ОК		

Choosing the right operating system

7. Click **Download**. Keep the dialog box opened as you will need to copy the key presented in the dialog box when you configure DS Connector in the next section.

Step 3 - Installing and configuring DS Connector

In this section you will install DS Connector, and configure it to make it connect to both VP Online and ApacheDS.

- 1. Copy the downloaded zip file to the machine where ApacheDS is installed.
- 2. Extract the zip file to a folder.



DS Connector (zip) extracted

3. Open an elevated command prompt.

For Windows Server 2008 users, click the **Start** button, type **cmd**, and then right-click **Command Prompt** and select **Run as administrator** from the popup menu.

For Windows Server 2012 users, search cmd in the Apps screen, and then right-click Command Prompt and select Run as administrator at the bottom of the screen.



Run elevated command prompt

- 4. Navigate to **DS_Connector_12.1\service** where **DS_Connector_12.1** is the name of the folder extracted. Please run it as administrator to avoid any potential issues caused by insufficient write permission.
- Type the following command to install DS Connector as service: install_service.bat



Installing DS Connector as system service

- 6. Run DS_Connector_12.1\DSConnectorUl.exe.
- 7. When you run DS Connector the first time, you are prompted to configure the connection to VP Online/Teamwork Server. In the **Configure Server** window, keep **VPository** selected.

Configure Server	×
Cloud entry point: https://	.vpository.com
Кеу:	
Use proxy	
Other	Connect Cancel

Configure Server window

- 8. Fill in the cloud entry point.
- 9. Enter the key, which is the code you saw in the end of the previous section. If you have accidentally closed that dialog box, or if the key has expired, don't worry, just click **Configure** again (step 4 of the previous section) to obtain another key.

Configure Server		×
Cloud entry point:	: https://demo-vp	.vpository.com
Key:	cjb67as932Bcks12390uNK68asdv23KLasdnklc	
Use proxy		
Other		Connect Cancel

Entering key for server configuration

- 10. Click Connect. If succeed, you should see the message Server configuration succeed.
- 11. DS Connector is now connected to VP Online. Now, you need to configure the connection to ApacheDS. On the left hand side of the DS Connector Console, click Add Directory Server.

	DS Connector Console				
0	irectory Server				
Þ	rectory Servers			Users/Groups	Add
Ŀ	Name	Host	Enable		
	Add Directory Server				Remove
Г	45				
L					
L					
L					

To add a directory server

12. Select ApacheDS as Directory Server.

Configure Director	ry Server	X
Directory Server:	Active Directory -	
Name:	389 389 Directory Server	
Host:	Apache DS	Port: 389
Bind DN or User:	📮 Generic	
Password:	Open LDAP Univention	Secure Connection
Use proxy		
Test Connectio	n	Save Cancel

Selecting ApacheDS

- 13. Enter a name for this configuration.
- 14. Enter the host name and port of the ApacheDS. As we suggested you to install DS Connector on the machine where ApacheDS is installed, your host name is pretty likely to be localhost or 127.0.0.1. Regarding the port, while the default port of ApacheDS is 10389, you may need to confirm it with your administrator in case it has been changed.
- 15. Enter **Bind DN or User**. If you use Apache Directory Studio, you can obtain the required value by right clicking on the LDAP connection and selecting **Properties** from the popup menu. The Bind DN or user can be found under the **Authentication** tab.

b id=admin	Properties for "AdminConnecti	on"	
Bookmarks	type filter text	Connection	$(\neg \bullet \circ) \bullet \bullet \bullet \bullet$
	Connection	Network Parameter Authentication Browser Options Edit	Options
		Simple Authentication	•
		Authentication Parameter	
		Bind DN or user: uid=admin,ou=system	•
Connections W LDAP Servers		Bind password: •••••	
AdminConnection		Save password	Check Authentication
Les AdminConnection		SASL Settings	
		 Kerberos Settings 	
Den Connection			
	1		

Obtaining the Bind DN or user from Apache Directory Studio

16. Enter the password for logging into ApacheDS.

Configure Director	y Server	×
Directory Server:	Apache DS 🔹	
Name:	Apache DS Connection	
Host:	127.0.0.1	Port: 10389
Bind DN or User:	uid=admin,ou=system	
Password:	•••••	Secure Connection
Use proxy		
Test Connectio	n	Save Cancel

Configuring ApacheDS connection

- 17. Click Test Connection. If succeed, you should see the message Test connection succeed.
- 18. Click Save in the Configure Directory Server window.
- 19. The newly configured directory server is listed on the left hand side of the **DS Connector Console**. If necessary you can add more directory servers by repeating from step 11 until this step.

S DS Connector Console		-1.00		- 0 - X
Directory Server				
Directory Servers			Users/Groups	Add
Name	Host	Enable		
Apache DS Connection	127.0.0.1	1	1	Remove

Directory server added

Step 4 - Synchronizing users to VP Online

1.

In this section you will add users into DS Connector Console to let it synchronize the users to VP Online. When you finished this section, the chosen users can login VP Online from Visual Paradigm, using the login details managed by ApacheDS.

-		
Directory Servers		_
Name	Host	Enable
Participation Apache DS Connection	127.0.0.1	V

Selecting a directory server

- 2. On the right hand side, click **Add**.
- 3. In the Add users/group window, select the user groups to be made available on VP Online. The users in selected groups will become members of VP Online, and will have access to Visual Paradigm projects.



4. Click Add.

5. That's it. You can see the selected user groups listed on the right hand side of the DS Connector Console.

Users/Groups	Add
🖃 🖓 developer	
👸 jdoe	Remove
1	

Users added to DS Connector Console

The user groups, along with the users will be synchronized to VP Online shortly (~1 minute). Once the synchronization has been completed, you will see the user groups available in the **Members > Groups** page of VP Online, like this:

Members	Groups					
New Group	þ					۹
Gro	up		N	lembers	Projects	
dev	eloper		1		0	

User group synchronized to VP Online

The users are available in the **Members** page of VP Online. Note that the synchronization will synchronize only the user name and login ID. It will not synchronize nor to process any password of any users in ApacheDS. Whenever a user tries to login VP Online from Visual Paradigm, VP Online will communicate with ApacheDS for authentication.

Members	Groups	Viewers				
New Mem	ber				Show active members only	۹
Me	mbers		Projects	Last Login	Status	
🔲 jdo	e		0	-	Active	
mw	ong		0	-	Active	

Users synchronized from ApacheDS

So now, you assign the user groups to projects so that the users can open the project from Visual Paradigm and start working. If necessary you can also grant them admin permissions.

To login VP Online from Visual Paradigm, please enter the **Email (Login ID)** of member as **Email** (not the display name), and the password stored in ApacheDS as **Password**.

Teamwork Client			×
	Hello World Company		
Cloud entry point:		.vpository.com	
Email:	uid=jdoe,ou=users,ou=system		
Password:	•••••		
	Remember password		
Use proxy			
	Login	Cancel	

Login from Visual Paradigm

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Visual Paradigm Online Active Directory Authentication (Group)

Visual Paradigm Online ("VP Online") supports two ways of authentication - built-in authentication and directory server authentication. While the builtin authentication allows you to easily set up and manage member accounts completely inside VP Online, active server authentication allows users to login to VP Online with credentials stored in and managed by a directory server.

In order for directory server authentication to work, administrator has to install a utility called DS Connector, and have it configured to connect both VP Online and the directory server. DS Connector acts as bridge between VP Online and directory server. It's capable to synchronize user listing from directory server to VP Online, and to manage the authentication from Visual Paradigm to directory server, through VP Online.

In this page, you will learn how to work with Active Directory authentication from creating user groups in Active Directory to installing and configuring DS Connector. If you are interested in working with user instead of user group, please read Visual Paradigm Online Active Directory Authentication. If you are interested in LDAP Authentication, please read Visual Paradigm Online LDAP Authentication (Groups).

There are series of steps you need to take in order to make Active Directory authentication works. Please read through all the steps below without skipping any of them, even if you are familiar with Active Directory.

Step 1 - Creating organization unit, user and group in Active Directory

- 1. Start the Server Manager in Windows Server.
- 2. Click on Tools at top right and select Active Directory Administrative Center from the popup menu.

🛛 🌮 🚩 Manage	Tools View Help
	Active Directory Administrative Center
	Active Directory Domains and Trusts Active Directory Module for Windows PowerShell
Never Not configured Never	Active Directory Sites and Services Active Directory Users and Computers ADSI Edit

Open Active Directory Administrative Center

3. Select your domain from the list on the left hand side.

E Active		ectory Adminis	trative Ce
Active Directory <		STMCH (local) (13)	_
	Fil	ter	ı ا
Overview		Name	Туре
TESTMCH (local)		Name	21
Dynamic Access Control		Builtin	builtinDom
🔎 Global Search		Computers	Container
	-0	Domain Controllers	Organizati
	i.	ForeignSecurityPrincipals	Container
		Infrastructure	infrastructu
	Select	domain	

4. Create an Organizational Unit to house your corporate users. On the right navigation pane under **Task > <domain name>** click on **New** and then select **Organizational Unit**.

_ 🗆 X	
🕶 🕝 Manage Help	
Tasks	
¢	
Builtin ^	
New •	e u lí selaki
Delete	
Search under this node	
Properties	
TESTMCH (local)	
Change domain controller	
Raise the forest functional leve	· · · · · · · · · · · ·
Raise the domain functional le	
Enable Recycle Bin	
New 🕨	Group
Search under this node	Computer
Properties	User
	InetOrgPerson
	Organizational Unit

Create Organizational Unit

Organizational unit is like a company. Enter the mandatory details and click OK. 5.

Organizational Unit	Organizational	Unit				
Managed By	Name: Hello World Company Address: Street			Create in: DC=TESTM Description:	MCH,DC=LOCAL Chang	je
	City Country/Region:	State/Province	Zip/Postal code	Protect from acc	idental deletion	
	Managed By					¢
	Managed by:		Edit Clea	Office:		
	Phone numbers:			Address:		
	Main: Mobile:			Street		
	Fax			City	State/Province	Zip/Postal code
				Country/Region:		

Filling in the Organizational Unit screen

6. This will immediately create the Organizational Unit in the designated location. Double click on your newly created Organizational Unit.

	Name	Туре	Description	
in.	ForeignSecurityPrincipals	Container	Default container for secur	^
뻅	Hello World Company	Organizati		
	Infrastructure	infrastructu		
	LostAndFound	lostAndFou	Default container for orph	
in.	Managed Service Accounts	Container	Default container for man	
i.	NTDS Quotas	msDS-Quo	Quota specifications conta	=
i.	Program Data	Container	Default location for storag	
Ĩ.	System	Container	Builtin system settings	
i.	TPM Devices	msTPM-Inf		2

7. On the right navigation pane, click on **New**, and then select **User** from the popup menu.



8. Enter the mandatory details such as user's name.

Account	Account			?*
Jrganization Vlember Of Password Settings Profile	Middle initials: Last name: Full name: * User UPN logon: User SamAccountName L Password: Confirm password:	Company,DC=TESTMCH,DC=LOCAL Change	Account expires:	•

Filling in the User screen

9. Enter the password for the user.

10. Change the **Password options** to **Other password options**. If you don't do this, you won't be able to login with this user account from Visual Paradigm products.

Account expires:	Never End of	
Password options: O User must change pa O Other password opti	ons	•
Smart card is request Password never ex User cannot ch		
Encryption options:		•
Other options:		•

Change Password Option to 'Other password options'

- 11. Click **OK**. Repeat step 7 to step 10 to create all users in Active Directory.
- 12. On the right navigation pane, click on **New**, and then select **Group** from the popup menu.

	Properties Hello World Company	^	
	New	•	Organizational Unit
	Delete		InetOrgPerson
~	Move	- [Group
	Search under this node		User
	Properties		Computer
	Create group)	

13. Enter the mandatory fields such as group name.

Group	Group	8
Managed By Member Of Members Password Settings	Group name: * Inspec Group (SamAccountName * Inspec Group type: © Security O Distribution Protect from accidental deletion	E-mail: Create in: OU=Hello World Company,DC=TESTMCH,DC=LOCAL_Change Description: Notes:
	Managed By	×

Filling in the Group screen

14. Scroll down to the **Members** section. You can add users into the group in the **Members** section.

15. Click **Add...**.

Members		80
Filter	٩	Add
Name	Active Director	Remove

Adding member into a group

16. Enter the account name of the user you want to add into the group. Click OK.

Select Users, Contacts, Computers, Service Accounts,	or ? ×
Select this object type: Users, Service Accounts, Groups, or Other objects	Object Types
From this location:	
TESTMCH.LOCAL	Locations
Enter the object names to select (<u>examples</u>):	
peter	Check Names
Advanced OK	Cancel

Enter user's account name

17. Click **OK** in the **Create Group** screen to confirm group creation.

Step 2 - Downloading DS Connector from VP Online

DS Connector acts as a bridge between VP Online and directory server. In this section you will see how to download DS Connector from VP Online.

- 1. Open a web browser.
- 2. Visit and login your cloud entry point.
- 3. Select **System Tools** from the menu on the left hand side.

4. Open the tab **Single Sign-On**.

5. Click on Configure under the section Directory Service Connector.

System System Info	Single Sign-On		
Directory Service Connect	or		
Click the Configure button to setup the DS Connector.			
Configurare SAML 2.0			
Identity Provider (IDP) Name:			

To configure directory service connector

6. Choose the operating system for the machine where Active Directory is installed.

Confi	Configure Directory Services Connector						
2.	Download, install and configu Windows (32bit) Windows (32bit) Windows (64bit) Linux (32bit) Linux (64bit) Mac OS X (with JRE) Mac OS X	re the DS connector in the directory server machine. Download your connector 2kxg9M255d -11-24 14:40					
	Mac CO X	ОК					

Choosing the right operating system

7. Click **Download**. Keep the dialog box opened as you will need to copy the key presented in the dialog box when you configure DS Connector in the next section.

Step 3 - Installing and configuring DS Connector

- In this section you will install DS Connector, and configure it to make it connect to both VP Online and Active Directory.
- 1. Copy the downloaded zip file to the machine where Active Directory is installed.
- 2. Extract the zip file to a folder.

👪 l 💽 🔝 = l	Tools	
File Home Share	View	
🔄 🔄 🕆 🚺 🕨 C	omputer 🕨 Local Disk (C:) 🕨 Tools 🕨	✓ C Search Tc
🔆 Favorites	Name	Date modified Type
🔤 Desktop	DS_Connector_12.1	4/24/2015 11:50 AM File folder
🚺 Downloads 📃 Recent places		

DS Connector (zip) extracted

3. Open an elevated command prompt.

For Windows Server 2008 users, click the **Start** button, type **cmd**, and then right-click **Command Prompt** and select **Run as administrator** from the popup menu.

For Windows Server 2012 users, search cmd in the Apps screen, and then right-click Command Prompt and select Run as administrator at the bottom of the screen.



Run elevated command prompt

- 4. Navigate to DS_Connector_12.1\service where DS_Connector_12.1 is the name of the folder extracted.
- 5. Type the following command to install DS Connector as service:



Installing DS Connector as system service

- Run DS_Connector_12.1\DSConnectorUI.exe. Please run it as administrator to avoid any potential issues caused by insufficient write permission.
- 7. When you run DS Connector the first time, you are prompted to configure the connection to VP Online/Teamwork Server. In the **Configure** Server window, keep VPository selected.

		Configure Server		x
Cloud entry point:	https://			.vpository.com
Key:				
Use proxy Other			Conne	ct Cancel

To configure connection to VP Online

- 8. Fill in the cloud entry point.
- 9. Enter the key, which is the code you saw in the end of the previous section. If you have accidentally closed that dialog box, or if the key has expired, don't worry, just click **Configure** again (step 4 of the previous section) to obtain another key.

	Configure Server	x
Host:	192.168.5.106	Port: 1999
Key:	4C64L5wUZB9mE5N8459H4P2kxg9M255d	
Use proxy Other		Connect Cancel

Entering key for server configuration

- 10. Click Connect. If succeed, you should see the message Server configuration succeed.
- 11. DS Connector is now connected to VP Online. Now, you need to configure the connection to Active Directory. On the left hand side of the DS Connector Console, click Add Directory Server.

3		DS Con	nector Console	_ D X
Directory Server				
Directory Servers			Users/Groups	Add
Name Add Directory S	Host	Enable]	Remove
		To add a	directory server	

12. Select Active Directory as Directory Server.

	Configure	Directory Server	×
Directory Server:	Active Directory	~	
Name:			
Host:			Port: 389
Bind DN or User:			
Password:			Secure Connection
Use proxy			
Test Connectio	n		Save Cancel

Selecting Active Directory

- 13. Enter a name for this configuration.
- 14. Enter the host name and port of the Active Directory. As we suggested you to install DS Connector on the machine where Active Directory is installed, your host name is pretty likely to be localhost or 127.0.0.1. Regarding the port, while the default port of Active Directory is 389, you may need to confirm it with your administrator in case it has been changed.
- 15. Enter **Bind DN or User**. You can check the required value from the Account details page of the administrator user. The value of **User SamAccountName** is the value you need to enter now.

		_ _ X
John		TASKS ▼ SECTIONS ▼
Account	Account	?⊗⊝ ^
Organization Member Of Password Settings Profile Extensions	First name: Middle initials: Last name: Full name: * John User UPN logon: @ User SamAccountNam TESTMCH V* John	Account expires:
	Protect from accidental deletion	Password never expires User cannot change password
		Encryption options: Other options:

Obtaining the Bind DN or user

16. Enter the password for logging into Active Directory.

	Configure Directory Server	×			
Directory Server:	Active Directory				
Name:	Active Directory Connection				
Host:	127.0.0.1	Port: 389			
Bind DN or User:	TESTMCH\John				
Password:	•••••	Secure Connection			
Use proxy					
Test Connectio	Test Connection Save Cancel				

Configuring Active Directory connection

- 17. Click Test Connection. If succeed, you should see the message Test connection succeed.
- 18. Click Save in the Configure Directory Server window.
- 19. The newly configured directory server is listed on the left hand side of the **DS Connector Console**. If necessary you can add more directory servers by repeating from step 11 until this step.

DS Connector Console			ector Console	- 0	x
Directory Server					
Directory Servers			Users/Groups		Add
Name	Host	Enable			
Active Directory Connection	127.0.0.1			Re	emove

Step 4 - Synchronizing users to VP Online

In this section you will add users into DS Connector Console to let it synchronize the users to VP Online. When you finished this section, the chosen users can login VP Online from Visual Paradigm, using the login details managed by Active Directory.

1. Select the directory server in **DS Connector Console**.

*		DS Conn
Directory Server		
Directory Servers		
Name	Host	Enable
Active Directory Connection	127.0.0.1	✓
	h5	

Selecting a directory server

- 2. On the right hand side, click Add.
- 3. In the Add users/group window, select the user groups to be made available on VP Online. The users in selected groups will become members of VP Online, and will have access to Visual Paradigm projects.



- 4. Click Add.
- 5. That's it. You can see the selected user groups listed on the right hand side of the DS Connector Console.

ector Console	_ 🗆 X
Users/Groups 	Add

Users added to DS Connector Console

The user groups, along with the users will be synchronized to VP Online shortly (~1 minute). Once the synchronization has been completed, you will see the user groups available in the **Members > Groups** page of VP Online, like this:

Members	Groups	Viewers				
New Group						۹
Gro	up			Members	Projects	
insp	ector			1	0	

The users are available in the Members page of VP Online. Note that the synchronization will synchronize only the user name and login ID. It will not synchronize nor to process any password of any users in Active Directory. Whenever a user tries to login to VP Online from Visual Paradigm, VP Online will communicate with Active Directory for authentication.

1	Members	Groups Vi	ewers			
	New Men	nber			Show activ	ve members only
	□ M	embers		Projects	Last Login	Status
	E Pe	eter		0		Active

Users synchronized from Active Directory

So now, you assign the user groups to projects so that the users can open the project from Visual Paradigm and start working. If necessary you

can also grant them admin permissions. To login VP Online from Visual Paradigm, please enter the **Email(Login ID)** as shown in the image above as **Email**, and the password stored in Active Directory as Password.

Teamwork Clien	:	×
	Hello World Company	
Cloud entry point	: https://	
Email:	Peter	
Password:	•••••	
	Remember password	
Use proxy		
	Login Cancel	
	Login from Visual Paradigm	

Related Resources

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Managing projects

A project contains model(s) that describe the target system or application. It is to be edited and completed by members of a team.

Adding project

- 1. Visit the URL of your VP Online cloud entry point through web browser.
- 2. Log in your account.
- 3. Click on your profile image at top right and select Administration from the popup menu.



Open Administration page

4. Select **Projects** from the menu on the left.



Open Projects menu

- 5. Click on **New Project** and select the location, which is a folder that can be created in the previous screen, by clicking **New Folder**.
- 6. Press on + next to the members or member groups to assign them to the project. Note that there must be at least one member be assigned to the project in order to add the project.

New Project	
Sample Project	
Location:	
Root	*
Advanced Options 4 Members:	
David david@demo-vp.com	
Derek derek@demo-vp.com	
Gecko gecko@demo-vp.com	
Holly holly@demo-vp.com	-
Joey Joey@demo-vp.com	
Joy joy@demo-vp.com	
	Added Members: 4 Available Members: 5
	Create Project Cancel

Creating a project

- 7. Click on Create Project.
- 8. By default, the members who have been assigned to a project will have both the read and commit permissions on the project. If you want to change their permissions, move your mouse pointer over the row of project and then click **Edit**.

Phone		1	9
Sample Project	[Add Member] <u>[Edit]</u> راتاب	1	4
School (Facts)	0	4	9

To edit a project

9. Open the **Members** tab. From there you can change the permissions of members. The **Read** permission means that member can only open the project in Visual Paradigm and read its content. The **Read & Commit** permission means that member can both open project and commit changes to server.

Project	Members		PostMania			
Add M	Member Bulk A	ctions 👻				
	Members					General Permissions
	Andrew		[A	dvanced Permiss	ions] [Remove]	Read and Commit
	David					Read Only Read and Commit
	Derek					Read and Commit -
	Joy					Read and Commit -

Configuring members' permissions on this project

10. Click **Save** at top right to save the changes.

Renaming project

Renaming of project has to be done in Visual Paradigm, the client application. Team members who have "Update Project" permission can rename a project by take the following steps in Visual Paradigm.

- 1. Select **Project > Properties** from the toolbar.
- 2. In the **Project Properties** window, edit the project name.
- 3. Click OK.
- 4. Commit the change.

The other team members are suggested to perform an update to have their local project files renamed.

Deleting project

By deleting a project, team members will no longer be able to commit changes to server nor to open the project. Project deletion cannot be undone. Think carefully before you delete a project.

To delete a project:

- 1. Select **Projects** from the menu on the left.
- 2. Move your mouse pointer over the row of the project that you want to delete, and then click Edit.

Project Revisions	Members
AM-Headlines [Add Member] [Edit] 1	9
atm 1	9

To edit a project

3. Click on [Delete Project] at top right.

Project	Members	Wat	chers	Revisions	PostMania	Branches	
Project Na	ime: *		AM-He	adlines			
Relative P	roject Directory	.*	AM-He	eadlines			
Size:			566 KI	3			
Enable	Tasifier	[?]	https://d	online.visual-parao	digm.com/tasifier.jsp	#proj=1	
Enable	Agile	[?]	https://d	online.visual-parao	digm.com/scrum.jsp	#storymap:proj=1	1
Enable	PostMania	[?]	https://d	online.visual-parao	digm.com/postmani	a.jsp#proj=1	
1					Delete proj	ect	

4. You are prompted to answer a math question. Enter the answer and click **Delete**.

Changing project members' read/commit permissions

- 1. Select **Projects** from the menu on the left.
- 2. Move your mouse pointer over the row of the project that you want to change its project members' read/commit permissions, then click Edit.
- 3. Open the **Members** tab. From there you can update the permissions of members. The **Read** permission means that member can only open the project in Visual Paradigm and read its content. The **Read & Commit** permission means that member can both open project and commit changes to server.

Purging a project revision

To purge a revision is to delete the revision permanently. By purging a revision, team members working on the purged revision or before will not be able to commit nor update changes. Branches created from any purged revisions, if any, will no longer be able to merge back to the trunk. The action cannot be undone. Think carefully before you purge a revision.

To purge a project revision:

- 1. Select **Projects** from the menu on the left.
- 2. Move your mouse pointer over the row of the project that you want to change its project members' read/commit permissions, then click Edit.
- 3. Open the **Revisions** tab.
- 4. Move your mouse pointer over the row of the revision that you want to purge, then click **[Purge]**. Note that purging will be performed on the selected revision along with all the revisions before it. For example, if you have selected to purge revision 3, revisions 1 to 3 will be purged.

Project	t Memb	ers	Watchers	Revisions	PostMania	Branches
Project	Revisions					
Rev		Memt	ber		Date Time	
4		derek	@demo-vp.com		Nov 24, 2016	8 08:45:06
3	[Purge] الس	derek	@demo-vp.com		Nov 24, 2016	6 08:44:49
2	0	derek	@demo-vp.com		Nov 24, 2016	6 08:42:23
1		derek	@demo-vp.com		Aug 23, 2016	6 14:22:28

Purge a revision

5. You are prompted to answer a math question. Enter the answer and click **Purge**.

Related Resources

- The following resources may help you learn more about the topic discussed in this page.
- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Setting working days and holidays

Tasifier takes working days and holidays into account. The date picker can indicate those non-working days and holidays as colored cells. Tasifier also skipped those non-working days and holidays in the calculation of task duration. All these ensure tasks to be planned and carried out on schedule.

Due Date:	2014-09-02		٠						
Duration:	10 +	+	S	epte	embe	r 201	4	>	
Repeat:	None	Su	Мо	ти	We	Th	Fr	Sa	
		31	1	2	3	4	5	6	
		7	8	9	10	11	12	13	
		14	15	16	17	18	19	20	
		21	22	23	24	25	26	27	
		28	29	30	1	2	3	4	
		5	6	7	8	9	10	11	•
			_					2	014-08-19 13:45

Date picker with non-working days painted in gray, holidays painted in red

Setting working days

- 1. Visit the URL of your VP Online cloud entry point through web browser.
- 2. Log in your account.
- 3. Click on your profile image at top right and select Administration from the popup menu.

Mike H	lardy 🔻
💉 Edit Profi	le
Administr	0
U Logout	Ð

Open Administration page

4. Select **System Tools** from the menu on the left.



5. Under the Working Days section of the System tab, check the working day(s).

Working Days							
						r working unit. The workin ays are skipped in the cald	
Sunday	Monday	Tuesday	Wednesday	Thurday	Friday	Saturday	
			Updating	working dav	s		

6. Click **Save** at the top right to save the change.

Setting holidays

- 1. Visit the URL of your VP Online cloud entry point through web browser.
- 2. Log in your account.
- 3. Click on your profile image at top right and select Administration from the popup menu.

- 4. Select **System Tools** from the menu on the left.
- 5. Under the Holiday Profile section of the System tab, specify the source of holiday profile. You can select one from the Pre-defined list, or select Custom, and then download the template file, edit and upload the file back to apply your changes.

-	2	is also used by Tasifier in ensuring an accurate s Terent in date selector. (2) Holidays are skipped		
Pre-defined	None			
Custom	1. Download the template file:	Hong Kong Public Holiday	2018 🔻	Downloa
		(Learn more about the *.ics file format)		
	2. Edit the file (*.ics)			
	3. Upload the file	Choose File No file chosen		Upload

6. Click **Apply** to save the changes.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Setting default visibility of various panes

In Visual Paradigm, there are four panes that display the content of a project. They include:

- Diagram Navigator List and provides navigability to diagrams in project
- Model Explorer List and provides navigability to model elements in project, as well as to present the model hierarchy of project
- Class Repository List and provides navigability to classes and class members, as well as to present the hierarchy of classes and packages
- Logical View Allows you to categorize diagrams logically

Some teams may want to encourage their team members to use these panes, while some teams not. Visual Paradigm Online ("VP Online") supports setting the default visibility options of these panes. When a team member who are running Visual Paradigm tries to login to the server, he will see the panes that are set visible in VP Online become visible in Visual Paradigm.



Diagram Navigator in Visual Paradigm

Setting visibility of a pane

- 1. Visit the URL of your VP Online cloud entry point through web browser.
- 2. Log in your account.
- 3. Click on your profile image at top right and select Administration from the popup menu.



Open Administration page

4. Select System Tools from the menu on the left.



Open System Tools page

5. Under the **Panes** section of the **System** tab, set the visibility options for the panes.

Panes				
Control the visibility of various panes in Visual Paradigm Desktop. When a team project accesses this Desktop, those panes will be set visible or invisible according to the settings here.				
Diagram Navigator	Unspecified	v		
Model Explorer	Unspecified	N.		
Class Repository	Unspecified Show Hide			
Logical View	Unspecified	¥		
Diagram Backlog	Unspecified	Ŧ		

Updating the visibility option for Model Explorer

6. Click **Save** at the top right to save the change.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Introducing Teamwork Server

When several team members need to work on the same project, version control is always a major concern. The time and effort spent on merging the works of each team member is very expensive, and is very risky that the previous works may be overwritten by the new changes. Visual Paradigm's Teamwork Server automates these complex development processes.

Introducing Teamwork Server

Gain idea of Teamwork Server.

Introducing Teamwork Server

When several team members need to work on the same project, version control is always a major concern. The time and effort spent on merging the works of each team member is very expensive, and is very risky that the previous works may be overwritten by the new changes.

Visual Paradigm's Teamwork Server automates these complex development processes, although its concept is very simple:

Server-side

- The administrator creates accounts for team members.
- The administrator creates projects, and assigns selected members to the project. The read/update project permission is granted to members individually.

Client-side:

- The member logs in to the teamwork server.
- The member checks out (download) a project from the server and opens it on the client side.
- The member modifies the project locally, and then commit the changes to the server.
- The server will compare the local project with the server project, and begin the two-phase checkin process.
- The first phase checks whether conflicts are found. A conflict is the modification of a model/view element that is also modified by other team members. If no conflict is found, the server proceeds to the second phase. Otherwise the teamwork client will notify the member of the conflicts, and ask him/her to select the conflict resolve method before proceeding to the second phase.
- In the second phase, a new revision of the project is created by merging the changes made by the member with the latest project copy on the server. The new project is downloaded from the server to the client, and is reopened so that the member can work on the latest project.

Related Resources

- Visual Paradigm on YouTube
- <u>Contact us if you need any help or have any suggestion</u>
System requirements

Hardware requirements

- CPU: Dual core 2 GHz or better
- **RAM**: 4.0 GB or more, 8.0 GB recommended.
- HDD: at least 4 GB of free space (NOT include project space).

Software requirements

• OS: Microsoft Windows (XP/Vista/7/8,10), Microsoft Windows Server (2000/2003/2008/2012/2016/2019), Linux, Mac OS X 10.7.3 or above

Supported databases

- Oracle 8i, 9i, 10g, 11g, 12c
- MySQL 5.6 or above
- Microsoft SQL Server 2000, 2005, 2008, 2012, 2014, 2016, 2017, 2019
- Postgre SQL 7, 8, 9

Directory Server (For users who authenticate via directory server)

- 389 Directory Server
- Active Directory
- Apache DS
- Open LDAP
- Univention
- Any other Directory Server that supports Base DN

Related Resources

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Installation

Install Teamwork Server on server machine.

Installing Teamwork Server

See how to install Teamwork Server.

Uninstalling Teamwork Server

Learn how to uninstall VP Server from your system

Installing Teamwork Server

In order to install Teamwork Server, you need both the server program and a valid license key. If you have purchased Teamwork Server, you can download both of them from your customer account. If you are going to evaluate Teamwork Server, you can download the product from our official website and receive the evaluation key through E-mail. Get them ready, and read through this page to install the Teamwork Server. Before you start, make sure you have a machine ready for the installation of Teamwork Server. The minimum requirement of such machine is that it must be accessible by client machines through network, either Intranet or Internet.

1. Having downloaded the zipped Visual Paradigm Server to the server machine, extract it to the folder where you want the Teamwork Server to install to. When finish, you obtain a folder **VPServer**.

	VP_Server_14_0_20170 p	101_Win64.zi		
Compressed (zipped)		Open Open in new window		
		Extract All	\Im	

Extracting the zipped VP Server

- 2. Start up the server by running **VPServer\scripts\startup.bat** file (startup.sh for Linux and Mac OS X). You may see a command console appear. Do NOT close it or else the server will be stopped.
- 3. Open your Web browser and visit: http://127.0.0.1:1999/
- 4. The server installation page appears. Enter your organization's name and a new administrator password. Enter the same password again for confirmation.
- 5. Enter the server base URL. Click Next to proceed.

Visual Para	digm Server Installation
0—	-23
Information	Configuration Complete
Below you should enter your organ	nization name and set a password for the administrator.
Organization Name:	Hello World Company
Administrator Password:	•••••
Confirm Password:	
Server Base Url:	http://dev.demo-vp.com.1999/
	Next
How to import existing repository?	

Organization name and password are entered

6. To install Teamwork Server, keep Install Teamwork Module checked. Then, confirm the repository folder.

0-	2	-3
Information	Configuration	Complete
Repository is where teamwork p	roject files are stored. Plea	ase specify the repository folder.
2	Install Teamwork Modul	e
Repository Folder:	C:\Tools\VPServer\we	ebserver\webapps\RO(
License File:	Choose File No file of	chosen
_		

- 7. Click the Choose File button next to License File to import the Teamwork Server license file.
- 8. Click Next.
- 9. There is data that VP Server need to make persistent, such as your login name, password, server repository path, etc. All these have to be stored in a database. Now, setup a **new** database for this purpose. Then, fill in the connection information of the database. If you are unable to setup a database for this purpose, select **Embedded** as the database. The **Embedded** database is a ready-to-use database management system built into the server. In other words, no additional database setup has to be made by choosing **Embedded** database.

	Visual Paradigm Server Installation
	0
	Information Configuration Complete
A database is	needed to store the data and settings produced when running Visual Paradigm Server. Please configure the database.
	Select a Database: MySQL •
Hostname:	127.0.0.1
Database:	mydb
jdbc://	
User:	root Password:
Back	Next Test Connec

Configuring database

- 10. Click Next.
- 11. Wait until the installation is finished. After that, you can click the **Go to Login Page** button, login and start adding new members and projects. For detailed instruction, read the next section for server administration.

Visual Paradigm Server Installation	
0	
Information Configuration Complete	
Success! Visual Paradigm Server has been Installed.	
The login ID of the server administrator is Admin Please remember the login ID carefully!	
Go to Login Page	

Installation complete

Related Resources

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Uninstalling Teamwork Server

First of all, if your ultimate goal is to upgrade server, read the server upgrade guide. If you are sure that you want to remove VP Server from your system, perform the steps below for an uninstallation.

- 1. Run shutdown.bat (shutdown.sh for Linux and Mac OS X) in the scripts folder under the VP Server directory to stop the server.
- 2. If you are using Windows and if Teamwork Server was installed as a windows service, don't forget to remove the service as well. To remove the installed service, run **remove_service.bat** in the **scripts** folder under the VP Server installation directory.
- 3. Finally, you can delete the whole VP Server folder to remove it from the system. Note that this will delete the server repository as well if your repository folder is placed under the installation folder. Think twice before uninstallation.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Server administration

Manage members and projects of Teamwork Server.

Managing members

Learn how to manage team members in Teamwork Server.

Visual Paradigm Teamwork Server LDAP Authentication

Learn how to work with LDAP authentication in Visual Paradigm Teamwork Server.

Visual Paradigm Teamwork Server Active Directory Authentication

Learn how to work with Active Directory authentication in Visual Paradigm Teamwork Server.

Setting up Visual Paradigm Teamwork Server with Okta

Teamwork Server supports Okta for Enterprise clients. In this article we will go into the details of setting up SAML authentication through Okta.

Setting up Visual Paradigm Teamwork Server with Microsoft Azure

Teamwork Server supports Microsoft Azure for Enterprise clients. In this article we will go into the details of setting up SAML authentication through Microsoft Azure.

Managing groups

Learn how to manage groups in Teamwork Server.

Visual Paradigm Teamwork Server LDAP Authentication (Groups)

Learn how to work with LDAP authentication in Visual Paradigm Teamwork Server, to make it possible to use the user and user groups created in LDAP Server.

Visual Paradigm Teamwork Server Active Directory Authentication (Groups)

Learn how to work with Active Directory authentication in Visual Paradigm Teamwork Server, to make it possible to use the user and user groups created in Active Directory Server.

Managing projects

Learn how to manage projects in Teamwork Server.

Using the client update service

"Client Update" is a service that facilitates the update of client Visual Paradigm/ArchiMetric installation through the retrieval of updated files from VP Server. This article shows you how it works.

Managing members

A member is someone who has sufficient right to be the server administrator and/or be a general team member who works on a project file. A member can be assigned to one or more projects, and can be granted the permissions to read and/or update them. Moreover, selected members can be granted permission to administer (add/edit/remove) members or projects, so that the members can have all or part of the powers of a Teamwork Server administrator.

Adding member

- 1. Open a web browser.
- 2. Visit and login VP Server.

Login to VP Server	
Hello World Company	
Email (Login ID) Admin	
Password	
Stay Signed In	
LOGIN	
How to set up Visual Paradigm	

Logging into VP Server as administrator

- 3. At the top right, click on your profile logo image and select Admin Repository from the drop down menu.
- 4. Select **Members** from the menu on the left hand side.
- 5. Under the **Members** tab, click on **New Member**.
- 6. Enter the name, email address and password of the member to add.

Member	Permis	sions	Projects	
Name: *		Peter		
Email (Logi	n ID): *	peter@j	y.demo-vp.com	
Password:		•••••		
Confirm Password:				
Active				

Entering member details

Option	Description		
Name	Name of member. It is used for display purpose within the administration tool.		
Email (Login ID)	Email address of member. It is also the login ID member use to log into the server at client side.		
Password	The password member need to log into his/her account.		
Confirm Password	Re-enter the password for confirmation.		
Active	Set if you want to reject the member from logging into the server. Very often you set it when the member is no longer with your team and is not expected to modify the project anymore.		

Switch to the Permissions tab. Grant him/her the administrator rights for creating/updating/deleting member and/or project. If you want to limit
the member to perform certain action in Visual Paradigm, update the settings under the Access of features, Project configuration and Tag/
Branch sections.

Option	Description				
Repository	 The administrator right(s) of this member. Create project - Project refers to a Visual Paradigm project that is available to be checked out by a member from client side. The create right enables this member to add a new project into the server. He/she can create project by creating a blank project, by importing an existing .vpp project file or by importing an opening project when creating project at client side. Update project - Enables this member to modify the description, member assignments and granted permissions of projects. Delete project - Enables this member to remove a project from server. Create member - Member is someone who has sufficient right to be the server administrator and/or be a general team member who works on a project file. The create right enables this member to create member in server. Update member - Enables this member to modify the name, login ID, password, administrator permission and project assignments for all members in server. Manage member groups - A group is a named group of members who who share the same read and/or commit rights of project(s). By enabling this option, the member will have the right to create/edit/remove group. Note that removing the group does not remove the member from server. 				
Access of features	The functions member can/cannot perform in Visual Paradigm. Override the locks applied to elements and diagrams - When allowed, member can unlock a diagram locked by anyone, even for diagrams with password protected. Project options - When allowed, member can modify the configurable options set to projects. Add and remove referenced projects - When allowed, member can add and remove referenced projects.				
Project configuration	 The functions member can/cannot perform in Visual Paradigm. Stereotypes (Project-based) - When allowed, member can add, edit and remove stereotypes in projects. D efault tagged values - When allowed, member can define default tagged values for any type of model elements. Requirement types - When allowed, member can add, edit and remove requirement types. Viewpoints - When checked, member can add, edit and remove viewpoints and stakeholders. User story statuses - When allowed, member can add. edit and remove user story statuses. Project management lookups - When allowed, member can modify the lookup values for project management properties (e.g. phase, iteration, version, etc). 				
	 Business rule keywords - When allowed, member can add, edit and remove business rule keywords. Design pattern - When allowed, member can synchronize with server the local changes made to design patterns. Doc. Composer element templates - When allowed, member can duplicate and edit Doc Composer element templates. Task pool statuses - When allowed, member can configure task pool statuses in Tasifier. 				
Tag/Branch	The functions member can/cannot perform in Visual Paradigm. Create tag - When allowed, member can produce tags from teamwork project. Create branch - When allowed, member can produce branches from teamwork project. Merge branch - When allowed, member can merge changes made in branch to trunk, or the other way round. Delete branch - When allowed, member can delete any branch.				
	Ontions available when adding member				

Options available when adding member

- 8. Click **Save** at the top right of page.
- 9. If you have already added project, you can assign this member to project(s), too. Open the **Projects** tab. Click **Add Project** and press + on the project(s) that the member will involve. Click **Close**.
- 10. Decide whether he can read and/or commit changes made in the project. Read access enables opening the project from server and reading its content. Commit enables uploading project changes from client to server. This step is optional and you can assign member to project in project management page later on.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Visual Paradigm Teamwork Server LDAP Authentication

Teamwork Server supports two ways of authentication - built-in authentication and directory server authentication. While the built-in authentication allows you to easily set up and manage member accounts completely inside Teamwork Server, active server authentication allows users to login to Teamwork Server and VP Server with credentials stored in and managed by a directory server.

In order for directory server authentication to work, administrator has to install a utility called DS Connector, and have it configured to connect both VP Server and the directory server. DS Connector acts as bridge between VP Server and directory server. It's capable to synchronize user listing from directory server to VP Server, and to manage the authentication from Visual Paradigm to directory server, through VP Server.

In this page, you will learn how to work with LDAP authentication from creating users in Apache Directory Studio to installing and configuring DS Connector. If you are interested in working with user group instead of user, please read Visual Paradigm Teamwork Server LDAP Authentication (Groups). If you are interested in Active Directory Authentication, please read Visual Paradigm Teamwork Server Active Directory Authentication.

There are series of steps you need to take in order to make LDAP authentication works. Please read through all the steps below without skipping any of them, even if you are familiar with LDAP and Apache Directory Studio.

Step 1 - Creating user account in ApacheDS

In this section you will learn how to create user account in ApacheDS using Apache Directory Studio. It's mainly written for people who are not familiar with ApacheDS. However, even if you are familiar with ApacheDS, be sure to read through the steps as some of the settings will influence the authentication process.

- 1. In LDAP Browser, navigate to the **ou=users** node under **DIT > Root DSE > ou=system**.
- 2. Right click on the **ou=users** node in and select **New Entry...** from the popup menu.

LDAP Browser		🗎 ou=users,	ou=s	ystem 🛿		
	🍳 🤣 🖻 🔄 🏹	DN: ou=users	,ou=	system		
• = •	- 🔝 %	Attribute De	script	ion	Value	
a 🔓 DIT		objectClass objectClass ou			organizationalUnit (st top (abstract) users	
A Root DSE (5)						
b W dc=example,	dc=com					
A ou=config						
> & ou=schema						
🖌 🔏 ou=system (6)					
👃 ou=users						
⊳ 🖧 ou=conf	New	•	<u></u>	New Entry		
▷ & ou=cons ▷ & ou=grou	One False		<u></u>	New Context Ent	try	
⊳ 🖧 prefNode		•	A	New Search	Ctrl+H	
⊳ 🕴 uid=adm	Show in DIT	F3	P	New Bookmark.		
b Searches Bookmarks	Go to DN		-	New Batch Operation		
	🔕 Up	F4	Ē			
	Copy Entry / DN	Ctrl+C	F			

Adding a new entry via LDAP Browser

- 3. In the New Entry window, keep Create entry from scratch selected and click Next.
- 4. You are prompted to enter one structural object for creating the new user. Select inetOrgPerson as the object class

New Entry	
Object Classes Please select object classes of the entry. Select at class.	t least one structural object
Available object classes	
Selected inet	DraPerson

5. Click Add to add inetOrgPerson to the list of selected object classes. You will see a list the object classes from the inetOrgPerson object hierarchy are being added automatically.

New Entry			
Object Classes Please select object classes of the e class.	ntry. Select at least on	e structural object	
Available object classes		Selected object classes	
accessControlSubentry accessControlSubentry accessControlSubentry accessControlSubentry accessControlSubentry ads-authenticatorIntercep A ads-authenticatorImpl A ads-authenticatorImpl A ads-base ads-authenticatorImpl A ads-base ads-changePasswordServer Gs ads-changePasswordServer Gs ads-delegatingAuthenticat Gs ads-delegatingAuthenticat Gs ads-directoryService Gs ads-directoryService Gs ads-dnsServer	Add Remove	G₅ inetOrgPerson G₅ organizationalPerso G₅ person GA top	n

inetOrgPerson added to the list of selected object classes

- 6. Click Next.
- 7. For **RDN**, enter *uid=jdoe*, where *jdoe* is a unique shortname of the user you want to add now.

New Entry				
Distinguished Name Please select the parent of the new entry and enter the RDN.				
Parent:	ou=users,ou=system 💌	Br <u>o</u> wse		
RDN:	uid 🔻 = jdoe	+ -		
DN Preview:	uid=jdoe,ou=users,ou=system			
	RDN entered			

8. Click Next.

- 9. Fill in the attributes for *jdoe*. Enter *John Doe* as *cn*.
- 10. Enter Doe as sn.

New Entry				
Attributes Please enter the attributes for t	the entry. Enter at least the MUST attributes.			
DN: uid=jdoe,ou=users,ou=sy	stem 🖻 🖹 🕌 🎽			
Attribute Description	Value			
objectClass	inetOrgPerson (structural)			
objectClass	organizationalPerson (structural)			
objectClass	person (structural)			
objectClass	top (abstract)			
cn	John Doe			
sn	Doe			
uid	jdoe			

cn and sn specified

11. You can optionally add more attributes for this user. In particular, you may want to supply an email for this user. Doing so allows this user to login to Teamwork Server by entering his/her email address. Without supplying an email, he/she will need to login by entering string like *uid=jdoe,ou=users,ou=system* as username. If you want to add the **mail** attribute, click **New Attribute...** on top of the table, on the right hand side. Then, add and fill in the **mail** attribute. (note: Make sure you've selected the **mail** attribute, not **email/emailAddress**)

12. Create a password for this user. Click on **New Attribute...** as shown in the image below. By the way, be sure to set password for users who will use Visual Paradigm. Users without password won't be able to access the Teamwork Server.

New Entry				x
Attributes				7
Please enter the attributes for the entry. Enter at least the MUST attributes.				
DN: uid=jdoe,ou=users,ou=system 🔤 🛒 🎇 🎇				
Attribute Description	Value	45		
Cr	eate an attribute			

13. In the New Attribute window, select userPassword as Attribute Type.

New Attribut	e	
Attribute Typ	e	
Please enter o	r select the attribute type.	
Attribute type:	userPassword	
	Show subschema attributes only	
	Hide existing attributes	

Selected userPassword as attribute type

14. Click Finish.

15. Enter the password and click **OK**.

Password Editor			x			
New Password	New Password					
Enter New Password:						
Enter New Password:						
Select Hash Method:	Plaintext		-			
Password Preview:			5			
	Password (Hex):					
New Salt	Salt (Hex):					
	Show new page	ssword details				

Password entered

16. Click Finish.

Step 2 - Downloading DS Connector from VP Server

DS Connector acts as a bridge between VP Server and directory server. In this section you will see how to download DS Connector from VP Server.

- 1. Open a web browser.
- 2. Visit the Teamwork Server URL and login as administrator. Note that the login ID of the default server administrator is Admin.
- 3. Select **System Tools** from the menu on the left hand side.
- 4. Open the tab **Single Sign-On**.
- 5. Click on **Configure** under the section **Directory Service Connector**.

System	System Info	Single Sign-On				
Directory	Service Connect	or				
Click the Co	Click the Configure button to setup the DS Connector.					
Configura	re SAML 2.0					
Identity Prov	ider (IDP) Name:					
		To configur	e directory service con	nector		

- 6. Choose the operating system for the machine where ApacheDS is installed.

Confi	Configure Directory Services Connector				
1.	1. Download, install and configure the DS connector in the directory server machine. Windows (32bit)				
2.	Windows (32bit) Windows (64bit) Linux (32bit) Linux (64bit) Mac OS X (with JRE) Mac OS X	your connector Dk2123S7 11-24 15:16			
l	inde oo A	ОК			

Choosing the right operating system

7. Click **Download**. Keep the dialog box opened as you will need to copy the key presented in the dialog box when you configure DS Connector in the next section.

Step 3 - Installing and configuring DS Connector

In this section you will install DS Connector, and configure it to make it connect to both VP Server and ApacheDS.

- 1. Copy the downloaded zip file to the machine where ApacheDS is installed.
- 2. Extract the zip file to a folder.

🚱 🔍 🖉 🕌 🔸 Computer 🔸 Local Disk (C:) 🔸 Tools 🔸				
Organize 🔻 Includ	Organize Include in library Share with New folder			
☆ Favorites	Name	Date modified	Туре	Si
iibraries iii Documents iii Music	DS_Connector_12.1	4/23/2015 7:37 PM	File folder	

DS Connector (zip) extracted

3. Open an elevated command prompt.

4.

For Windows Server 2008 users, click the **Start** button, type **cmd**, and then right-click **Command Prompt** and select **Run as administrator** from the popup menu.

For Windows Server 2012 users, search cmd in the Apps screen, and then right-click Command Prompt and select Run as administrator at the bottom of the screen.



Navigate to DS_Connector_12.1\service where DS_Connector_12.1 is the name of the folder extracted.

5. Type the following command to install DS Connector as service: install_service.bat



- 6. Run **DS_Connector_12.1\DSConnectorUI.exe**. Please run it as administrator to avoid any potential issues caused by insufficient write permission.
- 7. When you run DS Connector the first time, you are prompted to configure the connection to VPository/Teamwork Server. In the **Configure** Server window, click Other and then select VP Server from the popup menu.

Configure Server	X
Cloud entry point: https://	.vpository.com
Кеу:	
Use proxy	
Other	Connect Cancel
VPository	
VP Server	

To configure connection to VP Server

- 8. Enter the host name and port of VP Server.
- 9. Enter the key, which is the code you saw in the end of the previous section. If you have accidentally closed that dialog box, or if the key has expired, don't worry, just click **Configure** again (step 5 of the previous section) to obtain another key.

Configure Server				
Host:	192.168.5.106 Port: 1999			
Key:	sa32458n748s2034d98WSvBFDk2123S7			
Use proxy				
Other	Connect Cancel			

Entering key for server configuration

- 10. Click Connect. If succeed, you should see the message Server configuration succeed.
- 11. DS Connector is now connected to VP Server. Now, you need to configure the connection to ApacheDS. On the left hand side of the DS Connector Console, click Add Directory Server.

😒 DS Connector Console	DS Connector Console				
Directory Server	Directory Server				
Directory Servers			Users/Groups	Add	
Add Directory Server	Host	Enable		Remove	

To add a directory server

12. Select ApacheDS as Directory Server.

Configure Directo	ry Server	X
Directory Server:	Active Directory -	
Name:	389 389 Directory Server	
Host:	🖗 Apache DS	Port: 389
Bind DN or User:	Generic 48	
Password:	Open LDAP Univention	Secure Connection
Use proxy		
Test Connection	n	Save Cancel

Selecting ApacheDS

- 13. Enter a name for this configuration.
- 14. Enter the host name and port of the ApacheDS. As we suggested you to install DS Connector on the machine where ApacheDS is installed, your host name is pretty likely to be localhost or 127.0.0.1. Regarding the port, while the default port of ApacheDS is 10389, you may need to confirm it with your administrator in case it has been changed.
- 15. Enter **Bind DN or User**. If you use Apache Directory Studio, you can obtain the required value by right clicking on the LDAP connection and selecting **Properties** from the popup menu. The Bind DN or user can be found under the **Authentication** tab.

⊳ 🖗 uid=admin	Properties for "AdminConnection				X
Bookmarks		Connection			↓ + ↓
	Connection	Network Paramete Authentication N	-	Browser Options Edit Op	ptions
		Simple Authenti	cation		-
		Authentication P	arameter		
		Bind DN or user:	uid=admin,ou=s	ystem	-
Connections El LDAP Servers		Bind password:	•••••		
			Save password		Check Authentication
4 AdminConnection		SASL Settings			
		 Kerberos Setti 	ngs		
0pen Connection					

Obtaining the Bind DN or user from Apache Directory Studio

16. Enter the password for logging into ApacheDS.

Configure Director	y Server	×
Directory Server:	Apache DS 🔹	
Name:	Apache DS Connection	
Host:	127.0.0.1	Port: 10389
Bind DN or User:	uid=admin,ou=system	
Password:	•••••	Secure Connection
Use proxy		
Test Connectio	n	Save Cancel

Configuring ApacheDS connection

- 17. Click Test Connection. If succeed, you should see the message Test connection succeed.
- 18. Click Save in the Configure Directory Server window.
- 19. The newly configured directory server is listed on the left hand side of the **DS Connector Console**. If necessary you can add more directory servers by repeating from step 11 until this step.

🔝 DS Connector Console		- 1.00	
Directory Server			
Directory Servers			Users/Groups Add
Name	Host	Enable	
Apache DS Connection	127.0.0.1	V	Remove

Directory server added

Step 4 - Synchronizing users to VP Server

In this section you will add users into DS Connector Console to let it synchronize the users to VP Server. When you finished this section, the chosen users can login Teamwork Server from Visual Paradigm, using the login details managed by ApacheDS.

1. Select the directory server in **DS Connector Console**.

🔝 DS Connector Console		- 5.00
Directory Server		
Directory Servers		
Name	Host	Enable
P Apache DS Connection	127.0.0.1	
	1	

- 2. On the right hand side, click Add.
- 3. In the Add users/group window, select the user(s) to be made available on Teamwork Server. The selected users will become members of Teamwork server, and will have access to Visual Paradigm projects.

Add users/groups	x
Apache DS Connection (127.0.0.1)	
🖶 🔲 🚣 config	
🗄 🗄 🖂 example	
🗄 🖳 🔚 🚣 schema	
🗄 🖳 🔚 📇 system	
🕀 🔲 🚘 configuration	
🕀 🗐 🛃 consumers	
🕀 🖂 🚘 groups	
🛱 🔲 🚘 users	
🔽 👔 jdoe	
🔲 🚰 admin	

Select users to add to DS Connector Console

- 4. Click Add.
- 5. That's it. You can see the selected users listed on the right hand side of the **DS Connector Console**.

Users/Groups	
å jdoe å mwong	Add
A mwong	Remove

Users added to DS Connector Console

The name and login ID of the selected users will be synchronized to VP Server shortly (~1 minute). Once the synchronization has been completed, you will see the users available in the **Members** page of VP Server. Note that the synchronization will synchronize only the user name and login ID. It will not synchronize nor to process any password of any users in ApacheDS. Whenever a user tries to login to Teamwork Server from Visual Paradigm, Teamwork Server will communicate with ApacheDS for authentication.

Members	Groups	Viewers			
New Mem	ber			🖉 Show a	ctive members only Q
Me	mbers		Projects	Last Login	Status
🔲 jdo	e		0	-	Active
mw	ong		0	-	Active

Users synchronized from ApacheDS

So now, you assign the users to projects so that they can open the project from Visual Paradigm and start working. If necessary you can also grant them admin permissions.

To login Teamwork Server from Visual Paradigm, please enter the **Email (Login ID)** of member as **Email** (not the display name), and the password stored in ApacheDS as **Password**.

	Hello World Company
Host:	127.0.0.1:1999
Email:	uid=jdoe,ou=users,ou=system
Password:	•••••
	Remember password
sAMAccourt	tName(optional):
Use pr	оху
	Login Canc

Login from Visual Paradigm

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Visual Paradigm Teamwork Server Active Directory Authentication

Teamwork Server supports two ways of authentication - built-in authentication and directory server authentication. While the built-in authentication allows you to easily set up and manage member accounts completely inside Teamwork Server, active server authentication allows users to login to Teamwork Server and VP Server with credentials stored in and managed by a directory server.

In order for directory server authentication to work, administrator has to install a utility called DS Connector, and have it configured to connect both VP Server and the directory server. DS Connector acts as bridge between VP Server and directory server. It's capable to synchronize user listing from directory server to VP Server, and to manage the authentication from Visual Paradigm to directory server, through VP Server.

In this page, you will learn how to work with Active Directory authentication from creating users in Apache Directory Studio to installing and configuring DS Connector. If you are interested in working with user group instead of user, please read Visual Paradigm Teamwork Server Active Directory Authentication (Groups). If you are interested in LDAP Authentication, please read Visual Paradigm Teamwork Server LDAP Authentication.

There are series of steps you need to take in order to make Active Directory authentication works. Please read through all the steps below without skipping any of them, even if you are familiar with Active Directory.

Step 1 - Creating organization unit and user in Active Directory

- 1. Start the Server Manager in Windows Server.
- 2. Click on **Tools** at top right and select **Active Directory Administrative Center** from the popup menu.

🛛 🌮 🚩 Manage	Tools View Help
	Active Directory Administrative Center
	Active Directory Domains and Trusts
	Active Directory Module for Windows PowerShell
	Active Directory Sites and Services
Never	Active Directory Users and Computers
Not configured Never	ADSI Edit

Open Active Directory Administrative Center

3. Select your domain from the list on the left hand side.

E - Active	Dir	ectory Administ	trative Ce
Active Directory <	TE	STMCH (local) (13)	
E 'E	Fil	ter	۱ م
Cverview			
TESTMCH (local)		Name	Туре
Dynamic Access Control		Builtin	builtinDom
🔎 Global Search	1	Computers	Container
	-0	Domain Controllers	Organizati
	i.	ForeignSecurityPrincipals	Container
		Infrastructure	infrastructu
S	elect	domain	

4. Create an Organizational Unit to house your corporate users. On the right navigation pane under **Task > <domain name>** click on **New** and then select **Organizational Unit**.

• Delete Manage Help Help	
Builtin ^	
Builtin ^ New +	
New +	
Delete	
Search under this node	
Properties	
TESTMCH (local)	
Change domain controller	
Raise the forest functional leve	
Raise the domain functional le	
Enable Recycle Bin	
New Group	
Search under this node Computer	
Properties User	
InetOrgPerson	
Organizational U	

Create Organizational Unit

5. Organizational unit is like a company. Enter the mandatory details and click **OK**.

Organizational Unit	Organizational	Unit				
Managed By	Name: Address: Street				Create in: DC=TESTMCH,DC=LOCAL Change- Description:	
	City Country/Region:	State/Province	Zip/Postal code	Protect from ac	cidental deletion	
	Managed By					(
	Managed by:		Edit., Cle	Office:		
	Phone numbers: Main:			Address		
	Mobile:			Street		
	Fax:			City	State/Province	Zip/Postal code
				Country/Region:		



6. This will immediately create the **Organizational Unit** in the designated location. Double click on your newly created **Organizational Unit**.

	Name	Туре	Description	
i.	ForeignSecurityPrincipals	Container	Default container for secur	^
맴	Hello World Company	Organizati		
	Infrastructure	infrastructu		1
	LostAndFound	lostAndFou	Default container for orph	
	Managed Service Accounts	Container	Default container for man	
	NTDS Quotas	msDS-Quo	Quota specifications conta	=
1	Program Data	Container	Default location for storag	
ī.	System	Container	Builtin system settings	
ī	TPM Devices	msTPM-Inf		

Double click on an Organization Unit to edit it

7. On the right navigation pane, click on **New**, and then select **User** from the popup menu.

\odot	Tasks	
	New 🔸	Group
	Delete	Computer
	Move	User
	Search under this node	InetOrgPerson
	Properties	Organizational Unit
	Create user	

8. Enter the mandatory details such as user's name.

Account	Account	T @	
Organization Member Of Password Settings Profile	First name: Peter Middle initials: Last name: Full name: Peter Full name: Peter User UPN logon: Image:	Account expires:	

Filling in the User screen

9. Enter the password for the user.

10. Change the **Password options** to **Other password options**. If you don't do this, you won't be able to login with this user account from Visual Paradigm products.

Account expires:	Never End of	
Password options:		•
 User must change pass Other password option: 		
	d for interactive log on	
Password never expi		
	ge password	_
Encryption options:		•
Other options:		•

Change to Other password options

11. Click **OK**. Repeat step 7 to step 10 to create all users in Active Directory.

Step 2 - Downloading DS Connector from VP Server

DS Connector acts as a bridge between VP Server and directory server. In this section you will see how to download DS Connector from VP Server.

- 1. Open a web browser.
- 2. Visit the Teamwork Server URL and login as administrator. Note that the login ID of the default server administrator is Admin.
- 3. Select **System Tools** from the menu on the left hand side.
- 4. Open the tab **Single Sign-On**.
- 5. Click on **Configure** under the section **Directory Service Connector**.

System System Info Single Sign-On	
Directory Service Connector	
Click the Configure button to setup the DS Connector.	Configure
Configurare SAML 2.0	
Identity Provider (IDP) Name:	

To configure directory service connector

6. Choose the operating system for the machine where Active Directory is installed.

Confi	gure Directory Services	Connector
1. [Download, install and configu Windows (32bit)	The the DS connector in the directory server machine.
2.	Windows (32bit) Windows (64bit)	your connector 2kxg9M255d
	Linux (32bit) Linux (64bit) Mac OS X (with JRE) Mac OS X	11-24 14:40
l	Mac CO X	ОК

Choosing the right operating system

7. Click **Download**. Keep the dialog box opened as you will need to copy the key presented in the dialog box when you configure DS Connector in the next section.

Step 3 - Installing and configuring DS Connector

In this section you will install DS Connector, and configure it to make it connect to both VP Server and Active Directory.

- 1. Copy the downloaded zip file to the machine where Active Directory is installed.
- 2. Extract the zip file to a folder.



DS Connector (zip) extracted

3. Open an elevated command prompt.

For Windows Server 2008 users, click the **Start** button, type **cmd**, and then right-click **Command Prompt** and select **Run as administrator** from the popup menu.

For Windows Server 2012 users, search cmd in the Apps screen, and then right-click Command Prompt and select Run as administrator at the bottom of the screen.



Run elevated command prompt

- 4. Navigate to DS_Connector_12.1\service where DS_Connector_12.1 is the name of the folder extracted.
- 5. Type the following command to install DS Connector as service:



Installing DS Connector as system service

- Run DS_Connector_12.1\DSConnectorUI.exe. Please run it as administrator to avoid any potential issues caused by insufficient write permission.
- 7. When you run DS Connector the first time, you are prompted to configure the connection to VPository/Teamwork Server. In the **Configure** Server window, click Other and then select VP Server from the popup menu.

Cloud entry point: https://vpository.com Key:		Configure Server	X
_		https://	.vpository.com
Other Connect Cancel		Connec	t Cancel
VPository VP Server	VP Server		

- 8. Enter the host name and port of VP Server.
- 9. Enter the key, which is the code you saw in the end of the previous section. If you have accidentally closed that dialog box, or if the key has expired, don't worry, just click **Configure** again (step 5 of the previous section) to obtain another key.

	Configure Server	x
Host:	192. 168. 5. 106	Port: 1999
Key:		
Use proxy Other		Connect Cancel

Entering key for server configuration

- 10. Click Connect. If succeed, you should see the message Server configuration succeed.
- 11. DS Connector is now connected to VP Server. Now, you need to configure the connection to Active Directory. On the left hand side of the DS Connector Console, click Add Directory Server.

2		DS Conr	nector Console	-	•	x	
Directory Server	Directory Server						
Directory Servers Users/Groups Add							
Name	Host	Enable					4
Add Directory Server	1				Rem	ove	J
1	4						
	-						

To add a directory server

12. Select Active Directory as Directory Server.

	Configure	Directory Server	×
Directory Server:	Active Directory	~	
Name:			
Host:			Port: 389
Bind DN or User:			
Password:			Secure Connection
Use proxy			
Test Connectio	n		Save Cancel

Selecting Active Directory

- 13. Enter a name for this configuration.
- 14. Enter the host name and port of the Active Directory. As we suggested you to install DS Connector on the machine where Active Directory is installed, your host name is pretty likely to be localhost or 127.0.0.1. Regarding the port, while the default port of Active Directory is 389, you may need to confirm it with your administrator in case it has been changed.
- 15. Enter Bind DN or User. You can check the required value from the Account details page of the administrator user. The value of User SamAccountName is the value you need to enter now.

		_ _ ×
John		TASKS ▼ SECTIONS ▼
Account	Account	• ● ●
Organization Member Of Password Settings Profile	er e	Account expires:
Extensions	User SamAccountNam TESTMCH * John	Smart card is required for interactive log on Password never expires User cannot change password
		Encryption options: Other options:

Obtaining the Bind DN or user

16. Enter the password for logging into Active Directory.

	Configure Directory Server	x
Directory Server:	Active Directory	
Name:	Active Directory Connection	
Host:	127.0.0.1	Port: 389
Bind DN or User:	TESTMCH\John	
Password:	•••••	Secure Connection
Use proxy		
Test Connectio	n	Save Cancel

Configuring Active Directory connection

- 17. Click Test Connection. If succeed, you should see the message Test connection succeed.
- 18. Click Save in the Configure Directory Server window.
- 19. The newly configured directory server is listed on the left hand side of the **DS Connector Console**. If necessary you can add more directory servers by repeating from step 11 until this step.

2		DS Conn	ector Console	- 1	•)	¢
Directory Server							
Directory Servers			Users/Groups	5	Δ.	dd	
Name	Host	Enable					
Active Directory Connection	127.0.0.1			L	Ren	nove	

Step 4 - Synchronizing users to VP Server

In this section you will add users into DS Connector Console to let it synchronize the users to VP Server. When you finished this section, the chosen users can login Teamwork Server from Visual Paradigm, using the login details managed by Active Directory.

1. Select the directory server in **DS Connector Console**.

3		DS Conn
Directory Server		
Directory Servers		
Name	Host	Enable
Active Directory Connection	127.0.0.1	✓
	ht	

Selecting a directory server

- 2. On the right hand side, click **Add**.
- 3. In the Add users/group window, select the user(s) to be made available on Teamwork Server. The selected users will become members of Teamwork server, and will have access to Visual Paradigm projects.

Add users/groups
Active Directory Connection (127.0.0.1)
🗉 🔲 🔛 Domain Controllers
🖃 🖳 🔛 Hello World Company
🛃 🚨 Peter
Computers Peter (Peter) TronspincerityPrincipals
🗐 🖳 🖬 Managed Service Accounts
Select users to add to DS Connector Console

- 4. Click Add.
- 5. That's it. You can see the selected users listed on the right hand side of the DS Connector Console.

ector Console	_ D X
Users/Groups	Remove

Users added to DS Connector Console

The name and login ID of the selected users will be synchronized to VP Server shortly (~1 minute). Once the synchronization has been completed, you will see the users available in the **Members** page of VP Server. Note that the synchronization will synchronize only the user name and login ID. It will not synchronize nor to process any password of any users in Active Directory. Whenever a user tries to login to Teamwork Server from Visual Paradigm, Teamwork Server will communicate with Active Directory for authentication.

Members						
New Mem	ber			(Show active members only	۹
Me	mbers	Proj	ects	Last Login	Status	
Pet	ler	0		-	Active	

Users synchronized from Active Directory

So now, you assign the users to projects so that they can open the project from Visual Paradigm and start working. If necessary you can also grant them admin permissions. To login Teamwork Server from Visual Paradigm, please enter the **Email(Login ID)** as shown in the image above as **Email**, and the password

stored in Active Directory as Password.

Teamwork	Client	×
	Hello World Company	
Host: Email:	127.0.0.1:1999 Peter	
Password:	•••••	
sAMAccour	Remember password httName(optional): oxy	
	Login Cancel	

Login from Visual Paradigm

Related Resources

- Visual Paradigm on YouTube •
- Visual Paradigm Know-How How to migrate Teamwork Server from Built-in Authentication to Active Directory Authentication •
- Contact us if you need any help or have any suggestion •

Setting up Visual Paradigm Teamwork Server with Okta

Teamwork Server supports Okta for Enterprise clients. In this article we will go into the details of setting up SAML authentication through Okta. Although this is specific to Okta the concepts could be adapted to any other SAML Identity Provider.

Step 1 - Setting up Okta

In this section you will learn how to create a new application integration in Okta.

- 1. Part of the setup of Okta requires providing details given by Teamwork Server. So now, open a web browser and login VP Server as administrator.
- 2. Select **System Tools** from the menu on the left hand side.
- 3. Open the Single Sign-On tab and keep it opened. We will come back later.

System	System Info	Single Sign-On
Directory	Service Connecto	or
Click the Co	nfigure button to setu	p the DS Connector.
Configura	re SAML 2.0	
Identity Prov	ider (IDP) Name:	
IDP metadat	a:	Choose File No file chosen
Single Sign-	on (ACS) URL:	http://127.0.0.1:1999/saml2/service/
Audience U	RI (SP Entity ID):	http://127.0.0.1:1999/saml2/
Start URL:		http://127.0.0.1:1999/

The Single Sign-On page of Teamwork Server

- 4. Open another tab/window in the web browser and visit Okta.
- 5. Create a new application integration in Okta. Select SAML 2.0 as sign-on method.

Create a New Application Integrati	ion	×
Sign on method	 Secure Web Authentication (SWA) Users credentials to sign in. This integration works with most apps. 	
	SAML 2.0 Uses the SAML protocol to log users into the app. This is a better option than SWA, if the app supports it.	
	Create Cancel	

Creating an application with SAML 2.0 as sign on method

6. Enter VP Teamwork Server as the name of application. Click Next.

App name	VP Teamwork Server	
App logo(optional) 💿	<u>نې</u>	
		Browse
	Upload Logo	
App visibility	Do not display application icon to users	
	Do not display application icon in the Okta Mol	bile app

Entering application name

7. Fill-in the SAML settings. Copy the value of Single Sign-on (ASC) URL from Teamwork Server to Okta as the Single sign on URL, and then copy the value of Audience URI (SP Entity ID) from Teamwork Server to Okta.

Configurare SAML 2.0			
Identity Provider (IDP) Name:		GENERAL	
IDP metadata:	Choose File No file chosen		
Single Sign-on (ACS) URL:	http://127.0.0.1:1999/sami2/service/	Single sign on URL	http://127.0.0.1:1999/sam/2/service/ Use this for Recipient URL and Destination URL
Audience URI (SP Entity ID):	http://127.0.0.1:1999/sami2/		Se this for Recipient ORE and Destination ORE
Start URL:	http://127.0.0.1:1999/	Audience URI (SP Entity ID) 🔘	http://127.0.0.1:1999/sami2/
(1	Feamwork Server)	Default RelayState 🔘	
			If no value is set, a blank RelayState is sent
		Name ID format 🔘	Unspecified +
		Application username 🔘	Okta username v
			Show Advanced Settings

Filling in SAML settings

8. Click Next.

9.	Select I'm an Okta customer adding an internal app and then click Finish.

1 The optional questions	below assist Okta Support in understanding your app integration.
App type 💿	This is an internal app that we have created
Contact app vendor	It's required to contact the vendor to enable SAML
Did you find SAML docs for this	app?
Enter any links here	

Choosing identity

10. Download the Identity Provider metadata under the Sign On tab.

ettings	Edit
SIGN ON METHODS	
The sign-on method determines how on methods require additional config	a user signs into and manages their credentials for an application. Some sign- uration in the 3rd party application.
SAML 2.0	
Default Relay State	
View Setup Instruction	red until you complete the setup instructions. s ta is available if this application supports dynamic configuration.
View Setup Instruction	s
View Setup Instruction	s

Download Identity Provider metadata

11. Open the **People** tab.

General

Sign On

Import

People

12. Click **Assign to People** and then assign the application to people who will use Teamwork Server. Doing so does not instantly grant those people the accessibility to Teamwork Server. You still have to go through the process of inviting them to Teamwork Server, which will be mentioned in the next section.

Assign VP Teamwork Server to People	×
Q Search	
Derek derek@demo-vp.com	Assign
Holly holly@demo-vp.com	Assign
Andrew andrew@demo-vp.com	Assign

	Done

Assigning VP Teamwork Server (application) to people

13. Click **Done** when finished.

Step 2 - Setting up Teamwork Server

1. Go back to Teamwork Server. You should be opening the **Single Sign-On** tab of the **System Tools** page. Now, enter Okta as the Identity Provider (IDP) Name.

System System Info	Single Sign-On	
Directory Service Connec		
Click the Configure button to set	tup the DS Connector.	Configure
Configurare SAML 2.0		
Identity Provider (IDP) Name:	Oktaj I	
IDP metadata:	Choose File No file chosen	
Single Sign-on (ACS) URL:	http://127.0.0.1:1999/saml2/service/	
Audience URI (SP Entity ID):	http://127.0.0.1:1999/saml2/	
Start URL:	http://127.0.0.1:1999/	
		Apply
	IDP name entered	

2. In the IDP metadata field, upload the Identity Provider metadata file downloaded in the previous section.

Identity Provider (IDP) Name:	Okta
IDP metadata:	Choose File metadata
Single Sign-on (ACS) URL:	http://127.0.0.1:1999/saml2/service/
Audience URI (SP Entity ID):	http://127.0.0.1:1999/saml2/
Start URL:	http://127.0.0.1:1999/

IDP metadata uploaded

- 3. Click Apply.
- 4. Click **OK** when you are prompted for confirmation. If sign-in success, you will be logged out automatically. If failed, please make sure the Teamwork Server application has been assigned to you in Okta, and try again.
- 5. From now on, Teamwork Server is integrated with Okta. You, as the administrator can access Teamwork Server with your Okta account and perform administration and management tasks. Team members, once being invited and have accepted the invitations, can login Teamwork Server from Visual Paradigm with their Okta account.

Hello World Company	Login to VP Server
	Hello World Company
- In the second se	LOGIN WITH OKTA

Login with Okta

Step 3 - Member management

Since the integration with Okta, in order for someone to become a Teamwork Server member, he/she has to:

- 1. Be a person who have been assigned the Teamwork Server application in Okta and,
- 2. Have accepted the invitation sent from Teamwork Server administrator.

The first point has been covered in step 1 above. In this section we are going to show you how to invite a member.

- 1. Open a web browser and login VP Server as administrator.
- 2. Select **Members** from the menu on the left hand side.
- 3. Under the **Members** tab, click **Invite Member**.

Members Management					
Members	Groups	Viewers			
Invite M	ember				
	Members				
		Invite r	nember		

4. Enter the name and email of the members. Make sure you have already assigned the VP Teamwork Server application to them in Okta. If not, they won't be able to access any projects. Click **Send Invitation**.

Invite Teammate	×			
You can invite your teammate(s) to work on this project by providing his/her name and email address. VP Server will send invitation email to your teammate(s).				
	accept and start working on your project within 10 minutes. After epted your invitation, you will receive a notification email.			
Name:	Email:			
Holly	holly@demo-vp.com X			
Andrew	andrew@demo-vp.com +			
	Send Invitation Cancel			

Send invitation

5. The invitee will receive an invitation shortly. Click on the activation link in the email.

isual 🗇 Paradigm	
	•••
Hi Holly, invites you to use Visual Paradigm Teamwork Server (http://127.0.0.1:1999). Please click the following link to activa	te your account.
Activate your Teamwork Server Account	

To activate Teamwork Server account

6. He/she will be redirected to a web page where he/she can fill in his name. Enter the name and click Activate with Okta.

Account Activation					
Activa	Activate your Teamwork Server account				
URL: Organization nar					
	Account Information				
	All fields are required.				
Name:	Holly				
Email:	Email: holly@demo-vp.com				
Activate with Okta					

Activating Teamwork Server account

If success, he will see the **Congratulations** screen. From now on, he/she can access Teamwork Server from Visual Paradigm with his/her Okta account.

Completed		
Congratulations! Your Teamwork Server account has been activated successfully.		
Activation success		

Related Resources

- User's Guide: Setting up Visual Paradigm Teamwork Server with Microsoft Azure
- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Setting up Visual Paradigm Teamwork Server with Microsoft Azure

Teamwork Server supports Microsoft Azure for Enterprise clients. In this article we will go into the details of setting up SAML authentication through Microsoft Azure. Although this is specific to Microsoft Azure the concepts could be adapted to any other SAML Identity Provider.

Step 1 - Setting up Microsoft Azure

In this section you will learn how to create a new application integration in Microsoft Azure.

- 1. Part of the setup of Microsoft Azure requires providing details given by Teamwork Server. So now, open a web browser and login VP Server as administrator.
- 2. Select **System Tools** from the menu on the left hand side.
- 3. Open the Single Sign-On tab and keep it opened. We will come back later.

System	System Info	Single Sign-On			
Directory	Directory Service Connector				
Click the Co	nfigure button to setu	p the DS Connector.			
Configura	re SAML 2.0				
Identity Prov	ider (IDP) Name:				
IDP metadat	a.	Choose File No file of	chosen		
Single Sign-	on (ACS) URL:	http://127.0.0.1:1999/	saml2/service/		
Audience UF	RI (SP Entity ID):	http://127.0.0.1:1999/	saml2/		
Start URL:		http://127.0.0.1:1999/			

The Single Sign-On page of Teamwork Server

- 4. Open another tab/window in the web browser and visit Microsoft Azure.
- 5. Create a new application in Azure. Name it *VP Teamwork Server*. Click **Next**.

(\rightarrow)

6. Fill-in the App properties. Copy the value of Single Sign-on (ASC) URL from Teamwork Server to Microsoft Azure as the SIGN-ON URL, and then copy the value of Audience URI (SP Entity ID) from Teamwork Server to Azure as APP ID URL.



Filling in App properties

- 7. Click Complete.
- 8. Click VIEW ENDPOINTS at the bottom of the screen.

	{≡}	1	Ľ	Ū	
VIEW ENDPOINTE UPLOAD LOGO MANAGE MANIFEST DELETE		UPLOAD LOGO	MANAGE MANIFEST	DELETE	

Clicking on View Endpoints

9. Copy the URL of **FEDERATION METADATA DOCUMENT**. Visit the URL and save the XML content to a new file.

×

App Endpoints
If you are developing an app that integrates with Microsoft Azure AD, update your code to use these endpoints for single sign-on and directory access.
FEDERATION METADATA DOCUMENT 🛜
https://login.microsoftonline.com/deb56257-406d-42db-ae87-f0e2546
WS-FEDERATION SIGN-ON ENDPOINT
https://login.microsoftonline.com/deb56257-406d-42db-ae87-f0e2546
SAML-P SIGN-ON ENDPOINT
https://login.microsoftonline.com/deb56257-406d-42db-ae87-f0e2546
SAML-P SIGN-OUT ENDPOINT
https://login.microsoftonline.com/deb56257-406d-42db-ae87-f0e2546
MICROSOFT AZURE AD GRAPH API ENDPOINT
https://graph.windows.net/deb56257-406d-42db-ae87-f0e2546a57e5
OAUTH 2.0 TOKEN ENDPOINT
https://login.microsoftonline.com/deb56257-406d-42db-ae87-f0e2546
OAUTH 2.0 AUTHORIZATION ENDPOINT
https://login.microsoftonline.com/deb56257-406d-42db-ae87-f0e2546
\checkmark

To open the URL of metadata

10. Open the **CONFIGURE** page.



Configure server

NO

11. Choose Yes for the option USER ASSIGNMENT REQUIRED TO ACCESS APP.

USER ASSIGNMENT REQUIRED TO ACCESS APP

o	YES	
	2	_

Enable the requirement of user assignment to acces app

12. Click SAVE at the bottom of the screen to save the changes.



Save changes

13. Open the **USERS AND GROUPS** page.



14. Select the person who will use Teamwork Server.

DISPLAY NAME	USER NAME	JOB TITLE	DEPARTMENT	ASSIGNED
Andrew				No
Derek 6				Yes
Holly				No

Selecting people to assign

15. Click **ASSIGN** at the bottom of the screen. Select **YES** for confirmation. Note that the assignment does not instantly grant this person accessibility to Teamwork Server. You still have to go through the process of inviting him/her to Teamwork Server, which will be mentioned in the next section.



User assignment

16. Repeat the assignment process on other people who need to access Teamwork Server.

Step 2 - Setting up Teamwork Server

1. Go back to Teamwork Server. You should be opening the **Single Sign-On** tab of the **System Tools** page. Now, enter *Azure* as the *Identity Provider (IDP) Name*.

System System Info	Single Sign-On	
Directory Service Connec	tor	
Click the Configure button to set	up the DS Connector.	Configure
Configurare SAML 2.0		
Identity Provider (IDP) Name:	Azurej I	
IDP metadata:	Choose File No file chosen	
Single Sign-on (ACS) URL:	http://127.0.0.1:1999/saml2/service/	
Audience URI (SP Entity ID):	http://127.0.0.1:1999/saml2/	
Start URL:	http://127.0.0.1:1999/	
		Apply
	IDP name entered	

2. In the **IDP metadata** field, upload the metadata file saved in the previous section.

Identity Provider (IDP) Name:	Azure
IDP metadata:	Choose File metadata.txt
Single Sign-on (ACS) URL:	http://127.0.0.1:1999/saml2/service/
Audience URI (SP Entity ID):	http://127.0.0.1:1999/saml2/
Start URL:	http://127.0.0.1:1999/

IDP metadata uploaded

3. Click Apply.

- 4. Click **OK** when you are prompted for confirmation. If sign-in success, you will be logged out automatically. If failed, please make sure the Teamwork Server application has been assigned to you in Microsoft Azure, and try again.
- 5. From now on, Teamwork Server is integrated with Microsoft Azure. You, as the administrator can access Teamwork Server with your Microsoft Azure account and perform administration and management tasks. Team members, once being invited and have accepted the invitations, can login Teamwork Server from Visual Paradigm with their Microsoft Azure account.

Login to VP Server
Hello World Company
How to set up Visual Paradigm

Login with Microsoft Azure

Step 3 - Member management

Since the integration with Microsoft Azure, in order for someone to become a Teamwork Server member, he/she has to:

- 1. Be a person who have been assigned the Teamwork Server application in Microsoft Azure and,
- 2. Have accepted the invitation sent from Teamwork Server administrator.

The first point has been covered in step 1 above. In this section we are going to show you how to invite a member.

- 1. Open a web browser and login VP Server as administrator.
- 2. Select **Members** from the menu on the left hand side.
- 3. Under the **Members** tab, click **Invite Member**.

Members Management		
Members	Groups	Viewers
Invite M	ember	
	Members	

Invite member

4. Enter the name and email of the members. Make sure you have already assigned the VP Teamwork Server application to them in Microsoft Azure. If not, they won't be able to access any projects. Click **Send Invitation**.

email address. VP Server Your teammate(s) can acc	nate(s) to work on this project by providing his/her name and will send invitation email to your teammate(s). cept and start working on your project within 10 minutes. After ed your invitation, you will receive a notification email.
Name:	Email:
Holly	holly@demo-vp.com X
Andrew	andrew@demo-vp.com +
	Send Invitation Cancel

Send invitation

5. The invitee will receive an invitation shortly. Click on the activation link in the email.

/isual 📀 Paradigm	
	•••
Hi Holly , invites you to use Visual Paradigm Teamwork Server (http://127.0.0.1:1999). Please click the following link to activat	e your account.
Activate your Teamwork Server Account	

To activate Teamwork Server account

6. He/she will be redirected to a web page where he/she can fill in his name. Enter the name and click Activate with Azure.

	Account Activation			
Activat	Activate your Teamwork Server account			
URL: Organization nam	-			
	Account Information			
	All fields are required.			
Name:	Holly			
Email:	holly@demo-vp.com			
Activate with Azure				

Activating Teamwork Server account

If success, he will see the **Congratulations** screen. From now on, he/she can access Teamwork Server from Visual Paradigm with his/her Microsoft Azure account.

Completed
Congratulations! Your Teamwork Server account has been activated successfully.
Activation success

Related Resources

- User's Guide: Setting up Visual Paradigm Teamwork Server with Okta
- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion
Managing groups

A group is a named category of members in teamwork server. It groups members who share the same characteristic and let them share the same project permission.

Adding group

- 1. Open a web browser.
- 2. Visit and login VP Server.

	Login to VP Server					
Hell	Hello World Company					
	nail (Login ID) dmin					
	ssword					
-	Stay Signed In					
	LOGIN					
How to set up Visual Pa	iradigm					

Logging into VP Server as administrator

- 3. At the top right, click on your profile logo image and select Admin Repository from the drop down menu.
- 4. Select **Members** from the menu on the left hand side.
- 5. Under the Group tab, click on New Group.

6. Enter the name of group.

Members	Permissio	ns Projects
Group Name	c*	Developer
Add Memb	er	
Mer	nbers	

Entering group name

- 7. Select members to add into the group. Click Add Members and then press + on the members to add into the group. Click Close when ready.
- 8. You may optionally assign the group to project(s). Open the **Projects** tab. Click **Add Project** and press + on the project(s) for assignments. Click **Close**.
- Decide whether the members in group can read and/or commit changes made in the project. Read access enables opening the project from server and reading its content. Commit enables uploading project changes from client to server. This step is optional and you can assign member to project in project management page later on.
- 10. Click Save.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Visual Paradigm Teamwork Server LDAP Authentication (Group)

Teamwork Server supports two ways of authentication - built-in authentication and directory server authentication. While the built-in authentication allows you to easily set up and manage member accounts completely inside Teamwork Server, active server authentication allows users to login to Teamwork Server and VP Server with credentials stored in and managed by a directory server.

In order for directory server authentication to work, administrator has to install a utility called DS Connector, and have it configured to connect both VP Server and the directory server. DS Connector acts as bridge between VP Server and directory server. It's capable to synchronize user listing from directory server to VP Server, and to manage the authentication from Visual Paradigm to directory server, through VP Server.

In this page, you will learn how to work with LDAP authentication from creating user groups in Apache Directory Studio to installing and configuring DS Connector. If you are interested in working with user instead of user group, please read Visual Paradigm Teamwork Server LDAP Authentication. If you are interested in Active Directory Authentication, please read Visual Paradigm Teamwork Server Active Directory Authentication (Groups).

There are series of steps you need to take in order to make LDAP authentication works. Please read through all the steps below without skipping any of them, even if you are familiar with LDAP and Apache Directory Studio.

Step 1 - Creating user account in ApacheDS

In this section you will learn how to create user account in ApacheDS using Apache Directory Studio. It's mainly written for people who are not familiar with ApacheDS. However, even if you are familiar with ApacheDS, be sure to read through the steps as some of the settings will influence the authentication process.

- 1. In LDAP Browser, navigate to the **ou=users** node under **DIT > Root DSE > ou=system**.
- 2. Right click on the **ou=groups** node in and select **New Entry...** from the popup menu.

LDAP Browser					
<u> </u>	! 🍫 🖻 🔄 ▽				
▼ = ▼	- 8				
🔺 🔓 DIT					
a 🗭 Root DSE (5)					
b 🛞 dc=example,dc=e	com				
⊳ 🖧 ou=config					
b 🖧 ou=schema					
a 😤 ou=system (6)					
⊳ 🖧 ou=configura	tion				
> 😤 ou=consume					
⊳ 😤 ou=groups מ					
a 🖁 ou=users (.	New	•	C	New Entry	2
⊳ 🍟 uid=jdo ⊳ 🧌 uid=m	Open Entry		ĊŶ	New Context Entry	45
k prefNodeN	Open With	+	1	New Search	Ctrl+H
⊳ 🐐 uid=admir 🖆	Show in DIT	F3	P	New Bookmark	
Searches	🔋 Go to DN		1	New Batch Operation	
Bookmarks	2 Up	F4		New Batch Operation	
	Copy Entry / DN	Ctrl+C			
1	Paste	Ctrl+V			
3	Celete Entry	Delete			

Adding a new entry via LDAP Browser

- 3. In the New Entry window, keep Create entry from scratch selected and click Next.
- 4. You are prompted to enter one structural object for creating the new user. Select groupOfUniqueNames as the object class

New Entry			
Object Classes Please select object classes of the e class.	entry. Select at least on	e structural object	
Available object classes groupOf G: groupOfNames G: groupOfUniqueNames C: C: C	Add Remove	Selected object classes	

5. Click Add to add groupOfUniqueNames to the list of selected object classes. You will see a list the object classes from the groupOfUniqueNames object hierarchy are being added automatically.



6. Click Next.

7. For **RDN**, enter *cn=developer*, where *developer* is the name of group and you should supply your own group name here - *developer* is just an example.

New Entry	
Distinguish Please selec	t the parent of the new entry and enter the RDN.
Parent:	ou=groups,ou=system
RDN:	cn 💌 = developer + -
DN Preview:	cn=developer,ou=groups,ou=system
	RDN entered

8. Click Next.

9. Add users into this group by creating multiple **uniqueMember** attributes and entering the DN of those users as attribute values. A uniqueMember attribute is default created. Enter the first user's **DN** in the **Value** cell.

inquementer attribute le deladit el	eateu. Enter the mist user's Div in the value cen.			
New Entry				
Attributes Attribute uniqueMember has an empty value, please insert a valid value.				
DN: cn=developer,ou=groups,ou=sy	stem 🚔 🚔 🕌 🎽 🎽			
Attribute Description	Value			
objectClass	groupOfUniqueNames (structural)			
objectClass	top (abstract)			
cn	developer			
uniqueMember	uid=jdoe,ou=users,ou=system			

Entering the DN of a user

By the way, be sure to set password for users who will use Visual Paradigm. Users without password won't be able to access the Teamwork Server. To set a password for a user, select the user node under **ou=users** in **LDAP Browser**. Click on **New Attribute...** in the **Entry Editor** on

the right hand side. In the **New Attribute** window, select **userPassword** to be the **Attribute type**. Click **Finish**, enter the password and click **OK** to confirm.

10. Add other users by creating more **uniqueMember** attributes. To do this, right click on any attribute row in the **New Entry** window and select **New Attribute...** from the popup menu. Then enter **uniqueMember** in the **Attribute type** field in the **New Attribute** window and click **Finish**. Finally, specify the DN of that user.

👔 New Entry					
Attributes Please enter the attributes for the entry. Enter at least the MUST attributes.					
DN: cn=developer,ou=groups,o	u=system 🖻 🖹 🗮 😤 🗎 🗮 🎽				
Attribute Description	Value				
objectClass	groupOfUniqueNames (structural)				
objectClass	top (abstract)				
cn	developer				
uniqueMember	uid=jdoe,ou=users,ou=system				
uniqueMember	uid=mwong,ou=users,ou=system				

Users added to user group

11. Click Finish.

Step 2 - Downloading DS Connector from VP Server

DS Connector acts as a bridge between VP Server and directory server. In this section you will see how to download DS Connector from VP Server.

- 1. Open a web browser.
- 2. Visit the Teamwork Server URL and login as administrator. Note that the login ID of the default server administrator is Admin.
- 3. Select **System Tools** from the menu on the left hand side.
- 4. Open the tab **Single Sign-On**.

5. Click on **Configure** under the section **Directory Service Connector**.

	System Info	Single Sign-On	
Directory	Service Connect	or	
Click the Co	nfigure button to setu	p the DS Connector.	Configure
Configura	re SAML 2.0		
Identity Prov	ider (IDP) Name:		

To configure directory service connector

6. Choose the operating system for the machine where ApacheDS is installed.

Confi	Configure Directory Services Connector					
1.	Download, install and config Windows (32bit) 🛛 🔓	gure •	the DS connector in the directory server machine.			
2.	Windows (32bit) Windows (64bit) Linux (32bit) Linux (64bit) Mac OS X (with JRE)		your connector Dk2123S7 11-24 15:16			
	Mac OS X		ОК			

Choosing the right operating system

7. Click **Download**. Keep the dialog box opened as you will need to copy the key presented in the dialog box when you configure DS Connector in the next section.

Step 3 - Installing and configuring DS Connector

In this section you will install DS Connector, and configure it to make it connect to both VP Server and ApacheDS.

- 1. Copy the downloaded zip file to the machine where ApacheDS is installed.
- 2. Extract the zip file to a folder.

	iter ▶ Local Disk (C:) ▶ Tools ▶ in library ▼ Share with ▼ New	v folder		
☆ Favorites ⇒ Libraries	Name BS_Connector_12.1	Date modified 4/23/2015 7:37 PM	Type File folder	Si
Documents	DS Connector (zij	b) extracted		

3. Open an elevated command prompt.

For Windows Server 2008 users, click the **Start** button, type **cmd**, and then right-click **Command Prompt** and select **Run as administrator** from the popup menu.

For Windows Server 2012 users, search cmd in the Apps screen, and then right-click Command Prompt and select Run as administrator at the bottom of the screen.



Run elevated command prompt

- 4. Navigate to **DS_Connector_12.1\service** where **DS_Connector_12.1** is the name of the folder extracted. Please run it as administrator to avoid any potential issues caused by insufficient write permission.
- 5. Type the following command to install DS Connector as service: install_service.bat



Installing DS Connector as system service

- 6. Run DS_Connector_12.1\DSConnectorUl.exe.
- When you run DS Connector the first time, you are prompted to configure the connection to VPository/Teamwork Server. In the Configure Server window, click Other and then select VP Server from the popup menu.

Configure Serve	er	×
Cloud entry po	nt: https://	.vpository.com
Key:		
🔲 Use proxy		
Other		Connect Cancel
🕒 🔍 VPosito	ny	
VP Serv	er	

To configure connection to VP Server

- 8. Enter the host name and port of VP Server.
- 9. Enter the key, which is the code you saw in the end of the previous section. If you have accidentally closed that dialog box, or if the key has expired, don't worry, just click **Configure** again (step 5 of the previous section) to obtain another key.

Configure Server	
Host:	192.168.5.106 Port: 1999
Key:	sa32458n748s2034d98WSvBFDk2123S7
Use proxy	
Other	Connect Cancel

Entering key for server configuration

- 10. Click Connect. If succeed, you should see the message Server configuration succeed.
- 11. DS Connector is now connected to VP Server. Now, you need to configure the connection to ApacheDS. On the left hand side of the DS Connector Console, click Add Directory Server.

S DS Connector C	onsole			- B - X
Directory Server				
Directory Servers			Users/Groups	Add
Name Add Directory	Host Server	Enable		Remove
		To add a dir	ectory server	

12. Select ApacheDS as Directory Server

Configure Director	y Server	×
Directory Server:	Active Directory -	
Name:	389 389 Directory Server	
Host:	Active Directory	Port: 389
Bind DN or User:	📮 Generic	
Password:	Dopen LDAP Univention	Secure Connection
Use proxy		
Test Connectio	n	Save Cancel

Selecting ApacheDS

- 13. Enter a name for this configuration.
- 14. Enter the host name and port of the ApacheDS. As we suggested you to install DS Connector on the machine where ApacheDS is installed, your host name is pretty likely to be localhost or 127.0.0.1. Regarding the port, while the default port of ApacheDS is 10389, you may need to confirm it with your administrator in case it has been changed.
- 15. Enter **Bind DN or User**. If you use Apache Directory Studio, you can obtain the required value by right clicking on the LDAP connection and selecting **Properties** from the popup menu. The Bind DN or user can be found under the **Authentication** tab.



Obtaining the Bind DN or user from Apache Directory Studio

16. Enter the password for logging into ApacheDS.

Configure Directo	ry Server	×
Directory Server:	Apache DS 🔹	
Name:	Apache DS Connection	
Host:	127.0.0.1	Port: 10389
Bind DN or User:	uid=admin,ou=system	
Password:	•••••	Secure Connection
Use proxy		
Test Connectio	n	Save Cancel

Configuring ApacheDS connection

- 17. Click Test Connection. If succeed, you should see the message Test connection succeed.
- 18. Click Save in the Configure Directory Server window.
- The newly configured directory server is listed on the left hand side of the DS Connector Console. If necessary you can add more directory 19. servers by repeating from step 11 until this step.

S DS Connector Console		- 5.00		• ×
Directory Server				
Directory Servers			Users/Groups	Add
Name	Host	Enable		
Apache DS Connection	127.0.0.1	V		Remove
		Directory	enver added	

Directory server added

Step 4 - Synchronizing users to VP Server

In this section you will add users into DS Connector Console to let it synchronize the users to VP Server. When you finished this section, the chosen users can login Teamwork Server from Visual Paradigm, using the login details managed by ApacheDS.

Select the directory server in DS Connector Console. 1.

S DS Connector Console		- 1.00
Directory Server		
Directory Servers		
Name	Host	Enable
Pache DS Connection	127.0.0.1	

Selecting a directory server

- 2. On the right hand side, click Add.
- 3. In the Add users/group window, select the user groups to be made available on Teamwork Server. The users in selected groups will become members of Teamwork server, and will have access to Visual Paradigm projects.

Add users/groups	X
Apache DS Connection (127.0.0.1)	
🖶 ··· 🔲 🚣 config	
🗄 🖳 🎯 example	
🖶 🕀 📰 📇 schema	
🖕 🗐 🛃 system	
🖶 🗇 🔚 🚣 configuration	
🖶 🖳 📠 consumers	
🖕 📖 🚘 groups	
😥 🖳 🕅 Administrators	
eveloper	
🔓 🛔 jdoe	
🛄 📲 mwong	
🖶 🗇 🔛 📲 users	
🔜 🔲 🐧 admin	
Select user groups to add to DS Connector Console	

4. Click Add.

5. That's it. You can see the selected user groups listed on the right hand side of the DS Connector Console.

Users/Groups	Add
⊡	Remove
mwong	

Users added to DS Connector Console

The user groups, along with the users will be synchronized to VP Server shortly (~1 minute). Once the synchronization has been completed, you will see the user groups available in the **Members > Groups** page of VP Server, like this:

Members	Groups	Viewers			
New Group	þ				٩
Gro	pup			Members	Projects
ev dev	eloper			1	0
		User group	o synchronized to \	P Server	

The users are available in the **Members** page of the **Teamwork module** of VP Server. Note that the synchronization will synchronize only the user name and login ID. It will not synchronize nor to process any password of any users in ApacheDS. Whenever a user tries to login to Teamwork Server from Visual Paradigm, Teamwork Server will communicate with ApacheDS for authentication.

Members	Groups	Viewers				
New Memb	ber			🗹 S	how active members only	۹
Mer	mbers		Projects	Last Login	Status	
🔲 jdo	e		0	-	Active	
mw	ong		0	-	Active	

Users synchronized from ApacheDS

So now, you assign the user groups to projects so that the users can open the project from Visual Paradigm and start working. If necessary you can also grant them admin permissions.

To login Teamwork Server from Visual Paradigm, please enter the Email (Login ID) of member as Email (not the display name), and the password stored in ApacheDS as Password.

	Hello World Company
Host:	127.0.0.1:1999
Email:	uid=jdoe,ou=users,ou=system
Password:	•••••
	Remember password
sAMAccourt	tName(optional):
Use pr	оху
	Login Canc

Login from Visual Paradigm

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Visual Paradigm Teamwork Server Active Directory Authentication (Group)

Teamwork Server supports two ways of authentication - built-in authentication and directory server authentication. While the built-in authentication allows you to easily set up and manage member accounts completely inside Teamwork Server, active server authentication allows users to login to Teamwork Server and VP Server with credentials stored in and managed by a directory server.

In order for directory server authentication to work, administrator has to install a utility called DS Connector, and have it configured to connect both VP Server and the directory server. DS Connector acts as bridge between VP Server and directory server. It's capable to synchronize user listing from directory server to VP Server, and to manage the authentication from Visual Paradigm to directory server, through VP Server.

In this page, you will learn how to work with Active Directory authentication from creating user groups in Active Directory to installing and configuring DS Connector. If you are interested in working with user instead of user group, please read Visual Paradigm Teamwork Server Active Directory Authentication (Groups). If you are interested in LDAP Authentication, please read Visual Paradigm Teamwork Server LDAP Authentication (Groups).

There are series of steps you need to take in order to make Active Directory authentication works. Please read through all the steps below without skipping any of them, even if you are familiar with Active Directory.

Step 1 - Creating organization unit, user and group in Active Directory

- 1. Start the Server Manager in Windows Server.
- 2. Click on **Tools** at top right and select **Active Directory Administrative Center** from the popup menu.

Tools View Help
Active Directory Administrative Center
Active Directory Domains and Trusts
Active Directory Module for Windows PowerShell
Active Directory Sites and Services
Active Directory Users and Computers
ADSI Edit

Open Active Directory Administrative Center

3. Select your domain from the list on the left hand side.

€ ✓ Active Directory Administrative Ce 							
Active Directory <	TE	STMCH (local) (13)					
E 'E	Filter P						
Cverview							
TESTMCH (local)		Name	Туре				
Dynamic Access Control		Builtin	builtinDom				
🔎 Global Search	1	Computers	Container				
		Domain Controllers	Organizati				
	i.	ForeignSecurityPrincipals	Container				
		Infrastructure	infrastructu				
S	elect	domain					

4. Create an Organizational Unit to house your corporate users. On the right navigation pane under **Task > <domain name>** click on **New** and then select **Organizational Unit**.

• Delete Manage Help Help	
Builtin ^	
Builtin ^ New +	
New +	
Delete	
Search under this node	
Properties	
TESTMCH (local)	
Change domain controller	
Raise the forest functional leve	
Raise the domain functional le	
Enable Recycle Bin	
New Group	
Search under this node Computer	
Properties User	
InetOrgPerson	
Organizational U	

Create Organizational Unit

5. Organizational unit is like a company. Enter the mandatory details and click **OK**.

Organizational Unit	Organizational	Unit				
Managed By	Name: Address: Street			Create in: DC=TES Description:	Create in: DC=TESTMCH,DC=LOCAL Change Description:	
	City Country/Region:	State/Province	Zip/Postal code	Protect from ac	cidental deletion	
	Managed By					(
	Managed by:		Edit., Cle	Office:		
	Phone numbers: Main:			Address		
	Mobile:			Street		
	Fax:			City	State/Province	Zip/Postal code
				Country/Region:		



6. This will immediately create the **Organizational Unit** in the designated location. Double click on your newly created **Organizational Unit**.

	Name	Туре	Description	
in.	ForeignSecurityPrincipals	Container	Default container for secur	1
64	Hello World Company	Organizati		
	Infrastructure	infrastructu		Τ.
	LostAndFound	lostAndFou	Default container for orph	
	Managed Service Accounts	Container	Default container for man	
	NTDS Quotas	msDS-Quo	Quota specifications conta	=
1	Program Data	Container	Default location for storag	
	System	Container	Builtin system settings	
	TPM Devices	msTPM-Inf		

Double click on an Organizational Unit to edit it

7. On the right navigation pane, click on **New**, and then select **User** from the popup menu.

\odot	Tasks	
	New 🔸	Group
	Delete	Computer
	Move	User
	Search under this node	InetOrgPerson
	Properties	Organizational Unit
	Create user	

8. Enter the mandatory details such as user's name.

reate User:	Peter			TASKS 🔻	SECTIONS V
ccount	Account				•
Irganization Aember Of assword Settings rofile	First name: Middle initials: Last name: Full name: User UPN logon: User SamAccountName L Password: Confirm password: Create in: OU#Hello Worl Protect from accidents Log on hours	d Company,DC=TESTMCH,DC=LOCAL Change	Account expires:	t next log on	*

Filling in the User screen

9. Enter the password for the user.

10. Change the **Password options** to **Other password options**. If you don't do this, you won't be able to login with this user account from Visual Paradigm products.

Account expires:	Never End of	
Password options:		
 User must change pass 	word at next log on	
 Other password option 	IS	
Smart card is require	ed for interactive log on	
Password never exp	ires	
User cannot chan	ige password	
Encryption options:		•
Other options:		•

Change Password Option to 'Other password options'

- 11. Click **OK**. Repeat step 7 to step 10 to create all users in Active Directory.
- 12. On the right navigation pane, click on **New**, and then select **Group** from the popup menu.



13. Enter the mandatory fields such as group name.

Group	Group	8
Managed By Member Of Members Password Settings	Group name: * Insp Group (SamAccountName* Insp Group type: Security Distribution Protect from accidental deletion	E-mail: Create in: OU=Hello World Company,DC=TESTMCH,DC=LOCAL Change Description: Notes:
	Managed By	×

Filling in the Group screen

14. Scroll down to the Members section. You can add users into the group in the Members section.

15. Click Add....

Members		88
Filter	Q	Add
Name	Active Director	Remove

Adding member into a group

16. Enter the account name of the user you want to add into the group. Click OK.

Select Users, Contacts, Computers, Service Accounts,	or	?	x
Select this object type: Users, Service Accounts, Groups, or Other objects	Obie	ect Typ	oes
From this location: TESTMCH.LOCAL			
Enter the object names to select (examples):	LO	cation	IS
peter	Che	eck Na	ames
Advanced OK		Cano	cel

Enter user's account name

17. Click **OK** in the **Create Group** screen to confirm group creation.

Step 2 - Downloading DS Connector from VP Server

DS Connector acts as a bridge between VP Server and directory server. In this section you will see how to download DS Connector from VP Server.

- 1. Open a web browser.
- 2. Visit the Teamwork Server URL and login as administrator. Note that the login ID of the default server administrator is Admin.
- 3. Select **System Tools** from the menu on the left hand side.
- 4. Open the tab **Single Sign-On**.
- 5. Click on **Configure** under the section **Directory Service Connector**.

	System Info	Single Sign-On				
Directory Service Connector						
Click the Configure button to setup the DS Connector.						
Configura	Configurare SAML 2.0					
Identity Prov	ider (IDP) Name:					

6. Choose the operating system for the machine where Active Directory is installed.

Confi	Configure Directory Services Connector					
1. [Download, install and configu Windows (32bit)	The the DS connector in the directory server machine.				
2.	Windows (32bit) Windows (64bit) Linux (32bit) Linux (64bit) Mac OS X (with JRE)	your connector 2kxg9M255d 11-24 14:40				
	Mac OS X	ОК				

Choosing the right operating system

7. Click **Download**. Keep the dialog box opened as you will need to copy the key presented in the dialog box when you configure DS Connector in the next section.

Step 3 - Installing and configuring DS Connector

In this section you will install DS Connector, and configure it to make it connect to both VP Server and Active Directory.

- 1. Copy the downloaded zip file to the machine where Active Directory is installed.
- 2. Extract the zip file to a folder.

👪 l 💽 👪 👳 l	Tools	
File Home Share	View	
🔄 🕘 🔹 🕆 🌗 🖌 Co	omputer 🕨 Local Disk (C:) 🕨 Tools 🕨	✓ C Search Tc
🔆 Favorites	Name	Date modified Type
🔲 Desktop	DS_Connector_12.1	4/24/2015 11:50 AM File folder
🐌 Downloads 🗐 Recent places		

DS Connector (zip) extracted

3. Open an elevated command prompt.

For Windows Server 2008 users, click the **Start** button, type **cmd**, and then right-click **Command Prompt** and select **Run as administrator** from the popup menu.

For Windows Server 2012 users, search cmd in the Apps screen, and then right-click Command Prompt and select Run as administrator at the bottom of the screen.



Run elevated command prompt

- 4. Navigate to DS_Connector_12.1\service where DS_Connector_12.1 is the name of the folder extracted.
- 5. Type the following command to install DS Connector as service: install_service.bat



Installing DS Connector as system service

- 6. Run **DS_Connector_12.1\DSConnectorUI.exe**. Please run it as administrator to avoid any potential issues caused by insufficient write permission.
- 7. When you run DS Connector the first time, you are prompted to configure the connection to VPository/Teamwork Server. In the **Configure** Server window, click Other and then select VP Server from the popup menu.

	Configure Server	x
Cloud entry point: Key:	https://	.vpository.com
Use proxy Other	Conne	ct Cancel
VPository VP Server		

To configure connection to VP Server

- 8. Enter the host name and port of VP Server.
- 9. Enter the key, which is the code you saw in the end of the previous section. If you have accidentally closed that dialog box, or if the key has expired, don't worry, just click **Configure** again (step 5 of the previous section) to obtain another key.

	Configure Server	X
Host:	192.168.5.106	Port: 1999
Key:	4C64L5wUZB9mE5N8459H4P2kxg9M255d	
Use proxy		
Other		Connect Cancel

Entering key for server configuration

- 10. Click Connect. If succeed, you should see the message Server configuration succeed.
- 11. DS Connector is now connected to VP Server. Now, you need to configure the connection to Active Directory. On the left hand side of the DS Connector Console, click Add Directory Server.

3	DS Connector Console					
Directory Server						
Directory Servers			Users/Groups	Add		
Name Add Directory Se	Host	Enable		Remove		
		To add a	directory server			

12. Select Active Directory as Directory Server.

	Configure	Directory Server	x
Directory Server:	Active Directory	~	
Name:			
Host:			Port: 389
Bind DN or User:			
Password:			Secure Connection
Use proxy			
Test Connectio	n		Save Cancel

Selecting Active Directory

- 13. Enter a name for this configuration.
- 14. Enter the host name and port of the Active Directory. As we suggested you to install DS Connector on the machine where Active Directory is installed, your host name is pretty likely to be localhost or 127.0.0.1. Regarding the port, while the default port of Active Directory is 389, you may need to confirm it with your administrator in case it has been changed.
- 15. Enter **Bind DN or User**. You can check the required value from the Account details page of the administrator user. The value of **User SamAccountName** is the value you need to enter now.

John		TASKS V SECTIONS V
Account	Account	?⊗⊗ ^
Organization Member Of Password Settings Profile	First name: Middle initials: Last name: Full name: User UPN logon: ©	Account expires:
Extensions	User SamAccountNam[TESTMCH \೫ John	Smart card is required for interactive log on Password never expires User cannot change password
		Encryption options:

Obtaining the Bind DN or user

16. Enter the password for logging into Active Directory.

Directory Server:	Active Directory	
Name:	Active Directory Connection	
Host:	127.0.0.1	Port: 389
Bind DN or User:	TESTMCH\John	
Password:	•••••	Secure Connection
Use proxy	n	Save Cancel

Configuring Active Directory connection

- 17. Click Test Connection. If succeed, you should see the message Test connection succeed.
- 18. Click Save in the Configure Directory Server window.
- 19. The newly configured directory server is listed on the left hand side of the **DS Connector Console**. If necessary you can add more directory servers by repeating from step 11 until this step.

2	DS Connector Console				3	x
Directory Server						
Directory Servers			Users/Groups		Add	
Name	Host	Enable				-1
Active Directory Connection	127.0.0.1			Re	move	:

Step 4 - Synchronizing users to VP Server

In this section you will add users into DS Connector Console to let it synchronize the users to VP Server. When you finished this section, the chosen users can login Teamwork Server from Visual Paradigm, using the login details managed by Active Directory.

1. Select the directory server in **DS Connector Console**.

3		DS Conn
Directory Server		
Directory Servers		
Name	Host	Enable
Active Directory Connection	127.0.0.1	✓
	ht	

Selecting a directory server

- 2. On the right hand side, click Add.
- 3. In the Add users/group window, select the user groups to be made available on Teamwork Server. The users in selected groups will become members of Teamwork server, and will have access to Visual Paradigm projects.



- 4. Click Add.
- 5. That's it. You can see the selected user groups listed on the right hand side of the DS Connector Console.

ector Console	_ D X
Users/Groups ▲ inspector ▲ Peter	Add

Users added to DS Connector Console

The user groups, along with the users will be synchronized to VP Server shortly (~1 minute). Once the synchronization has been completed, you will see the user groups available in the **Members > Groups** page of VP Server, like this:

Hello World Company			A Admin -
Management	Members Management		
Projects	Members Groups Viewers		
1 Members	New Group		Q
Administration	New Group		~
Floating License	Group	Members	Projects
▲ Tools	inspector	1	0
Configuration			
System Tools			

User group synchronized to VP Server

The users are available in the **Members** page of the **Teamwork module** of VP Server. Note that the synchronization will synchronize only the user name and login ID. It will not synchronize nor to process any password of any users in Active Directory. Whenever a user tries to login to Teamwork Server from Visual Paradigm, Teamwork Server will communicate with Active Directory for authentication.

Members							
New Membe	er				Show activ	ve members only	۹
Mem	ibers		Projects	Last Logir	1	Status	
Peter	r		0	-		Active	

Users synchronized from Active Directory

So now, you assign the user groups to projects so that the users can open the project from Visual Paradigm and start working. If necessary you can also grant them admin permissions.

To login Teamwork Server from Visual Paradigm, please enter the **Email(Login ID)** as shown in the image above as **Email**, and the password stored in Active Directory as **Password**.

😵 Teamwork	Client	×
	Hello World Company	
Host:	127.0.0.1:1999	
Email:	Peter	
Password:	••••••	
	Remember password	
sAMAccourt	ttName(optional):	
Use pr	оху	
	Login Cancel	
		_

Login from Visual Paradigm

Union of permissions among user groups

It is legit and technically possible to have a user placed in multiple user groups. For example, Mary is both a product manager and tester, and therefore belong to two different user groups for the two distinct roles. Because different level of permissions can be set to different groups, Teamwork Server takes the union of all and apply the result to the user. The following table shows you how it works. Let's say all the users in the table are members of group X, Y and Z. The "A" permission they enjoy is a union of the "A" permission specified in group X, Y and Z.

User	Permission "A" of Group "X" (specified in AD)	Permission "A" of Group "Y" (specified in AD)	Permission "A" of Group "Z" (specified in AD)	Result: Permission "A" of user (in Teamwork Server)
Peter T	RUE	TRUE	TRUE	TRUE
Mary T	RUE	FALSE	TRUE	TRUE
David F.	ALSE	FALSE	FALSE	FALSE

Example of the union of permissions among user groups

Permission overriding

While permissions can be specified for user groups, it is also possible to specify permissions for every user, no matter he/she is inside a group or not. Permissions specified for user has a higher priority than thay specified for the user group(s) the user belong to. The following table shows you the idea. If you want to know how to specify permission for user, please read the page Visual Paradigm Teamwork Server Active Directory Authentication.

User	Permission "A" of Group "X" (specified in AD)	Permission "A" of Group "Z" (specified in AD)	Result: Permission "A" of user (in Teamwork Server)
Peter T	ſRUE	TRUE	TRUE
Mary T	IRUE	FALSE	TRUE
David F	FALSE	TRUE	FALSE

Betty	FALSE
-------	-------

FALSE

Example of the permission overriding

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Visual Paradigm Know-How How to migrate Teamwork Server from Built-in Authentication to Active Directory Authentication</u>
 <u>Contact us if you need any help or have any suggestion</u>

Managing projects

A project contains model(s) that describe the target system or application. It is to be edited and completed by members of a team.

Adding project

- 1. Open a web browser
- 2. Visit and login Teamwork Server.
- 3. At the top right, click on your profile logo image and select Admin Repository from the drop down menu.
- 4. Select **Projects** from the menu on the left.
- 5. Click on **New Project** and select the location, which is a folder that can be created in the previous screen, by clicking **New Folder**.
- 6. Press on + next to the members or member groups to assign them to the project. Note that there must be at least one member be assigned to the project in order to add the project.



7. Click on Create Project.

8. By default, the members who have been assigned to a project will have both the read and commit permissions on the project. If you want to change their permissions, move your mouse pointer over the row of project and then click **Edit**.



9. Open the **Members** tab. From there you can change the permissions of members. The **Read** permission means that member can only open the project in Visual Paradigm and read its content. The **Read & Commit** permission means that member can both open project and commit changes to server.

Pr	oject	Members	Revisions	PostMania	Branches		
	Add N	Member Bulk A	Actions 👻				
		Members					General Permissions
		Andrew		[A	dvanced Permiss	ions] [Remove]	Read and Commit
		David					Read Only Read and Commit
		Derek					Read and Commit -
		Joy					Read and Commit 🗸

Configuring members' permissions on this project

10. Click **Save** at top right to save the changes.

Renaming project

Renaming of project has to be done in Visual Paradigm, the client application. Team members who have "Update Project" permission can rename a project by take the following steps in Visual Paradigm.

- 1. Select **Project > Properties** from the toolbar.
- 2. In the **Project Properties** window, edit the project name.
- 3. Click OK.
- 4. Commit the change.

The other team members are suggested to perform an update to have their local project files renamed.

Deleting project

By deleting a project, team members will no longer be able to commit changes to server nor to open the project. Project deletion cannot be undone. Think carefully before you delete a project.

To delete a project:

- 1. Select **Projects** from the menu on the left.
- 2. Move your mouse pointer over the row of the project that you want to delete, and then click Edit.



To edit a project

3. Click on [Delete Project] at top right.

Project	Members			PostMania	Branches
Project Na	ime: *		AM-Hea	adlines	[Delete Project]
Relative P	Relative Project Directory: *			adlines	
Enable	Tasifier	[?]	http://12	7.0.0.1:1999/tasifie	ier.jsp#proj=4
Enable	UeXceler	[?]	http://12	7.0.0.1:1999/uexc	celerjsp#proj=4
1					Delete project

4. You are prompted to answer a math question. Enter the answer and click Delete.

Changing project members' read/commit permissions

- 1. Select **Projects** from the menu on the left.
- 2. Move your mouse pointer over the row of the project that you want to change its project members' read/commit permissions, then click Edit.
- Open the Members tab. From there you can update the permissions of members. The Read permission means that member can only open the project in Visual Paradigm and read its content. The Read & Commit permission means that member can both open project and commit changes to server.

Purging a project revision

To purge a revision is to delete the revision permanently. By purging a revision, team members working on the purged revision or before will not be able to commit nor update changes. Branches created from any purged revisions, if any, will no longer be able to merge back to the trunk. The action cannot be undone. Think carefully before you purge a revision.

To purge a project revision:

- 1. Select **Projects** from the menu on the left.
- 2. Move your mouse pointer over the row of the project that you want to change its project members' read/commit permissions, then click Edit.
- 3. Open the **Revisions** tab.
- 4. Move your mouse pointer over the row of the revision that you want to purge, then click **[Purge]**. Note that purging will be performed on the selected revision along with all the revisions before it. For example, if you have selected to purge revision 3, revisions 1 to 3 will be purged.

	Project	Memt	pers	Revisions	PostMania	Branches	
P	roject R	evisions					
	Rev	ev Member		Date Time			
	4		derek	@demo-vp.com		Nov 24, 2016	08:45:06
	3	[Purge] ျက	derek	@demo-vp.com		Nov 24, 2016	08:44:49
	2	0	derek	@demo-vp.com		Nov 24, 2016	08:42:23
	1		derek	@demo-vp.com		Aug 23, 2016	14:22:28

Purge a revision

5. You are prompted to answer a math question. Enter the answer and click **Purge**.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Setting working days and holidays

Tasifier takes working days and holidays into account. The date picker can indicate those non-working days and holidays as colored cells. Tasifier also skipped those working days and holidays in the calculation of task duration. All these ensure tasks to be planned and carried out on schedule.

Due Date: 2014-09-0	2 🗎	٠						
Duration: 10	+ +	s	epte	embe	r 201	4	>	
Repeat: None	Su	Мо	Ти	We	Th	Fr	Sa	
•	31	1	2	3	4	5	6	
	7	8	9	10	11	12	13	
	14	15	16	17	18	19	20	
	21	22	23	24	25	26	27	
	28	29	30	1	2	3	4	
	5	6	7	8	9	10	11	
							2	014-08-19

Date picker with non-working days painted in gray, holidays painted in red

Setting working days

- 1. Open a web browser
- 2. Visit the VP Server URL and login as administrator. Note that the login ID of the default server administrator is Admin.
- 3. Select **System Tools** from the menu on the left.
- 4. Under the Working Days section of the System tab, check the working day(s).

Working Da	ys						
Sunday	Monday	Tuesday	Wednesday	Thurday	Friday	Saturday	
		Uμ	odating working	days			

5. Click **Save** at the top right to save the change.

Setting holidays

- 1. Open a web browser
- 2. Visit the VP Server URL and login as administrator. Note that the login ID of the default server administrator is Admin.
- 3. Select System Tools from the menu on the left.
- 4. Under the **Holiday Profile** section of the **System** tab, specify the source of holiday profile. You can select one from the **Pre-defined** list, or select **Custom**, and then download the template file, edit and upload the file back to apply your changes.

Pre-defined	None			
Custom	1. Download the template file:	Hong Kong Public Holiday	2017 🔻	Download
		(Learn more about the *.ics file format)		
	2. Edit the file (*.ics)			
	3. Upload the file	Choose File No file chosen		Upload

5. Click **Apply** to save the changes.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Setting default visibility of various panes

In Visual Paradigm, there are four panes that display the content of a project. They include:

- Diagram Navigator List and provides navigability to diagrams in project
- Model Explorer List and provides navigability to model elements in project, as well as to present the model hierarchy of project
- Class Repository List and provides navigability to classes and class members, as well as to present the hierarchy of classes and packages
- Logical View Allows you to categorize diagrams logically

These panes are hidden by default, under Sleek UI theme. Some teams may want to encourage their team members in using these panes. VPository supports setting the default visibility options of these panes. When a team member who are running Visual Paradigm tries to login to the server, he will see the panes that are set visible in VPository become visible in Visual Paradigm.



Diagram Navigator in Visual Paradigm

Setting visibility of a pane

- 1. Open a web browser.
- 2. Visit the VP Server URL and login as administrator. Note that the login ID of the default server administrator is Admin.
- 3. Select System Tools from the menu on the left.
- 4. Under the **Panes** section of the **System** tab, set the visibility options for the panes.

Panes		
Diagram Navigator	Unspecified	T
Model Explorer	Unspecified	×
Class Repository	Unspecified Show Hide	
Logical View	Unspecified	¥

Updating the visibility option for Model Explorer

5. Click **Save** at the top right to save the change.

Related Resources

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Using the client update service

"Client Update" is a service that facilitates the update of client Visual Paradigm installation through the retrieval of updated files from VP Server. By enabling this service, VP Server will downloads product updates from Visual Paradigm's remote server periodically. Team members can then connect to the VP Server to update their software installation.

Benefits

5.

Taking an organization in which 100 computers have been installed with Visual Paradigm as an example, you have to connect to the Internet 100 times for getting the same update files; it leads to wasting of resources in terms of bandwidth and time. With the client update service you can save resources by downloading the update files to a server in your LAN once and sharing the updated files to your local network clients through the local area network. As the download process is done only once, it will not waste bandwidth and time for downloading the same files many times. On the other hand, computers that installed Visual Paradigm can update their installation easily and quickly once the updated files are available on the server. Hence, you can benefit from getting the update files as soon as possible by using the local area network instead of Internet and keeping the working version of your team in sync.

How does it works?

- 1. Open a web browser
- 2. Visit the VP Server URL and login as administrator. Note that the login ID of the default server administrator is Admin.
- 3. Select **Client Update** from the menu on the left hand side.
- 4. Click the button **Check for Update**.

Client Upd	date Installation
To equip with	h the update functionality, you will need to take the following steps:
1. Download	the updated Zip file to your desktop from Visual Pardigm Server with the below links.
Check fo	or Update
_	Visual Paradigm
•	Version: 14.0
•	Build Number: 20170201
	Release Date: Feb 01, 2017
	0
2. Upload up	bdated Zip file
Updated Z	Tin file: Choose File No file chosen
opuateu 2	
Upload	

Download latest installation

- 6. Upload the downloaded file to VP Server.
- 7. Click **Upload**. You should now see the details about the build uploaded. Team members can run VP Update and enter the path http:// <YOUR_VP_SERVER_HOST>/productupdate/vp.jsp as update URL.

🔇 Visual Paradigm Update	Configure update source
Configure update	Please select the update source.
Check updates	
Download updates	🔿 Visual Paradigm update server 🛛
Apply updates	Internal update server
Visual Paradigm Update completed	URL: http://192.168.5.106:1999/productupdate/vp.jsp
	Check Updates
Updating Visual Paradign	n by retrieving update files from VP Server

Related Resources

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Starting and stopping server Start server to let clients get product access it.

Starting server

Learn how to start server.

Stopping server

Learn how to stop server.

Starting server

In order to let client products connect to the server for performing teamwork operations, the VP Server must be started and be running properly. To start the server, simply run **startup.bat** (startup.sh for Linux and Mac OS X) in the **scripts** folder under the VP Server server program directory. By starting VP Server, the Teamwork Server module will be started automatically.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Stopping server

When the Teamwork Server is stopped, client products can no longer perform all teamwork operations such as check out project, commit and update changes. Therefore, stopping of server must be done carefully.

Stopping of server involves two main parts. The first part is to let VP Server check if it is safe to perform a shut down and to shut down for you if alright. The second part is to stop the server program.

- 1. Open a web browser.
- 2. Visit the VP Server URL and login as administrator. Note that the login ID of the default server administrator is Admin.

Login to VP S	Server
Hello World C	Company
Email (Login ID)	
Admin	
Password	
OT	
Stay Signe	d In
LOGIN	
How to set up Visual Paradigm	

Logging into VP Server as administrator

3. Select **Tools** from the menu on the left hand side.

4. Under the **Miscellaneous** section, click on the button **Shutodnw Server**.

Miscellaneous	
Clear system temp files	Clear
Server Pre-Shutdown Preparation	Shutdown Server

Shutdown VP Server

5. Click **Shutdown** when you are prompted for confirmation. This will start the pre-shutdown procedures. It first checks if it is possible to perform a shut down. If someone is connecting to the server for performing tasks like commiting, shutdown will be rejected. If it is safe to shutdown, it will shutdown the server for you.

6. Run **shutdown.bat** (shutdown.sh for Linux and Mac OS X) in the **scripts** folder under the VP Server server program directory to quit the process.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Installing Windows service

Install Teamwork Server as windows service to make it auto run when starting O/S.

Installing Windows service

Learn how to install Teamwork Server as service in Windows.

Removing service

Learn how to remove Teamwork Server service.

Installing Mac OS X Startup Item

Learn how to install Teamwork Server startup item in Mac.

Installing Windows service

By installing VP Server as a Windows service, this causes the VP Server to start when starting Windows. By starting VP Server, the Teamwork Server module will be started automatically. In other words, you do not need to start it up manually. To install Windows service, make sure your computer has JDK (Java Development Kit) installed. If not, download from http://www.java.com/en/download/ and install it. After that, run install_service.bat in the scripts folder under the VP Server program directory.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Removing service

By removing Windows service, the VP Server will no longer start when starting Windows. Therefore, you will need to start it yourself. To remove the installed service, run **remove_service.bat** in the **scripts** folder under the VP Server program directory.

Related Resources

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Installing Mac OS X Startup Item

In order to make Teamwork Server run when launching Mac OS X, you need to create a startup item, which cause the VP Server to be executed during the final phase of the boot process.

To install VP Server startup item:

- 1. Setup the VP Server. Make sure the name of server folder was named as VPServer, which is the default name you see when extracting the downloaded and zipped server program.
- 2. Go to /Library/StartupItems. If StartupItems does not exist, create it manually. VPFloatingLicenseServer 4 ⊩ 88 = 111 1=1 0 **☆** -Applications **DEVICES** Keychains pderby.log LaunchAgents ь Developer LaunchDaemons Þ Second Library -Logs ь 🔼 iDisk repository.config Modem Scripts Þ SHARED System PDF Services p-User 🚞 Perl Þ Users PreferencePanes Þ 🖹 vp.log Preferences þ Printers PrivilegedHelperTools Þ Python QuickLook þ Þ QuickTime 🙆 All, Receipts Þ PLACES 🚞 Ruby Þ þ 🔣 Desktop Sandbox Þ Screen Savers 👚 rain Scripts Þ Applications Security Documents Þ Speech SEARCH FOR Spelling þ 🕒 Today Spotlight () Yesterday Startupltems Þ 1 Past Week Main ▷ Ibrary ▷ I StartupItems ▷ I VPFloatingLicenseServer All Images 2 items, 237.77 GB available Go to /Library/StartupItems
- Create a folder named VPServer under /Library/StartupItems. You must have root permission in advance. To get root permission, execute 3. command " sudo su". After that, you have to provide root password for proceeding.
- 4. Create two files: VPServer and StartupParameters.plist respectively under the VPServer folder.
- 5. Edit VPServer and fill in the content as below. Replace %path_to_your_server% with a correct value.

```
#!/bin/sh
. /etc/rc.common
# The start subroutine
StartService() {
/%path_to_your_server%/VPServer/webserver/bin/startup.sh
}
# The stop subroutine
StopService() {
/%path_to_your_server%/VPServer/webserver/bin/shutdown.sh
# The restart subroutine
RestartService() {
/%path_to_your_server%/VPServer/webserver/bin/shutdown.sh
/%path_to_your_server%/VPServer/webserver/bin/startup.sh
RunService &ldguo;$1″
Edit StartupParameters.plist and fill in the content as below.
<?xml version=&rdquo;1.0&Prime; encoding=&rdquo;UTF-8&Prime;?>
<!DOCTYPE plist PUBLIC &ldquo;-//Apple//DTD PLIST 1.0//EN&rdquo; &ldquo;http://www.apple.com/DTDs/PropertyList-1.0.dtd&rdquo;>
<plist version=&rdquo;1.0&Prime;>
   <dict>
       <key>Description</key>
       <string>VPServer</string>
       <key>Provides</key>
```

```
<array>
       <string>VPServer</string>
   </array>
</dict>
```

6.

</plist>

- 7. Set permission for those files. Set owner as root, change group as wheel and make sure there are execute permission to those files. You can execute command chmod 755 * on those files to grant the execute permission.
- 8. Restart your machine to activate Mac OS X system service.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Upgrading to new version Upgrade Teamwork Server to newer version.

Upgrading to new version

Learn the steps needed to upgrade Teamwork Server.

Upgrading to new version

When Visual Paradigm has released a new version, you may want to upgrade to it. For users of Teamwork Server, do not forget to upgrade also the VP Server. Otherwise, you will not be able to perform team operations in the upgraded client products due to compatibility issues. In this page, server administrator will learn how to manage and execute the upgrade process of Teamwork Server.

Upgrading from VP Server 5.3 or Any Higher Version

1. Get ready for the license keys and **WebApp** of the latest version of Teamwork Server. You can download them from your customer account by logging into our <u>Customer Service Center</u>. To download WebApp, make sure **Web Application** is selected for downloading.

FIGURE	CI DIOII	Allacuirci		
Visual Paradigm	14.0	Windows 32bit	•	Download
Visual Paradigm Server VP Teamwork Server 14.0 Floating License Server	14.0	Windows 32bit Vindows 32bit Windows 32bit Unux 32bit Unux 32bit	Download	
tents pending. All rights reserved. Legal Privacy Statemer	t	Linux 64bit Mac OS X Unix Generic		
		WebApp		

Download WebApp of VP Server

- 2. Open a Web browser. Login to the VP Server as administrator.
- 3. Select Server Update from the menu on the left.
- 4. Click Choose File and select the WebApp package you downloaded.

Update VPServer				
	Update Visual Paradigm Server			
	Update File: Choose File, No file chosen * (please select file named as VP_Server_{BUILD_NUMBER}_WebApp.zip).			

To select the WebApp package of VP Server

- 5. Once you selected the file, system will show up the build you use currently as well as the build you are going to update to. Click **Yes** to proceed. **Note that the server will be out of services for 10 to 15 seconds when upgrading.
- 6. Update completed message will be shown once the update is done. And now the server is back to service. This completes the upgrade process. All the team members can resume working with the clients after upgrading.

Upgrading from VP Server 5.2 or Any Earlier Version

- 1. Get ready for the license keys and installers of the latest version of Teamwork Server. You can download them from your customer account by logging into our <u>Customer Service Center</u>.
- Stop VP Server by running %VP_Server_Dir%\scripts\shutdown.bat (shutdown.sh for Linux and Mac OS X). If Teamwork Server was
 installed as a Windows service (for Windows users), run %VP_Server_Dir%\scripts\remove_service.bat.
- 3. Zip the %VP_Server_Dir%. Rename the zip file by appending the current date to filename.
- 4. Having downloaded the new version of VP Server server program to the server machine, extract it to the folder where you want the new VP Server to install to.
- 5. Run the command console. Change the current directory to the scripts sub-folder of the extracted folder.
- Run the script migrate.bat with the parameter -path by specifying the old server folder: migrate.bat -path <old-server-dir> (E.g.: migrate -path "C:\VPServer 8.2")
- 7. Answer the math question and press **Enter** to produce the migration package. Depending on the size of the old VP Server, this process may take a while to complete. During the process, the existing VP Server will be stopped.
- 8. When finished, you should see the folder VPServerExport created under the scripts folder of the new VP Server.
- 9. Move the VPServerExport folder to %New_VP_Server_Dir%\webserver\webapps\ROOT\WEB-INF .
- 10. Start up the new server by running the **scripts\startup.bat** (startup.sh for Linux and Mac OS X). You may see a command console appear. Do NOT close it or else the server will be stopped.
- 11. Open a Web browser. Visit the server URL (e.g. http://127.0.0.1:1999).
- 12. You should see the message that a file called vpserver.tar.gz is found. Click Next to continue. If you do not see this message, please review the steps above and try again.
- 13. Follow the instructions to finish up the configuration of database and installed modules. When everything is done, you will be prompted to restart the server. After that you can start using the new server.

Upgrading from Teamwork Server 4.2 or Any Earlier Version

- 1. Get ready for the license keys and installers of the latest version of both Teamwork Server. You can download them from your customer account by logging into our <u>Customer Service Center</u>.
- Stop the Teamwork Server by running %Teamwork_Server_Dir%\bin\ShutdownTeamworkServer.exe (.sh for Linux and Mac OS X). If Teamwork Server was installed as a Windows service (for Windows users), please remove the service first.
- 3. Zip the **%Teamwork_Server_Dir%**. Rename the zip file by appending the current date to filename.
- 4. Having downloaded the new version of VP Server server program to the server machine, extract it to the folder where you want the new Teamwork Server to install to.
- 5. Run the command console. Change the current directory to the scripts sub-folder of the extracted folder.
- 6. Run the script migrate.bat with the parameter -path by specifying the old server folder.



- 7. Open a Web browser. Visit the server URL (e.g. http://127.0.0.1:1999).
- 8. Once the script is running, the old server will be disabled. The repository, user accounts and license key will be exported from the old server during the process. So for safety, enter result of summation to confirm the execution.
- 9. When finish, a folder VPServerExport will be created in the scripts folder.



Caption Here

- 10. Move the VPServerExport folder to %SERVER_DIR%\webserver\webapps\ROOT\WEB-INF .
- 11. Start up the new server by running the **scripts\startup.bat** (startup.sh for Linux and Mac OS X). You may see a command console appear. Do NOT close it or else the server will be stopped.
- 12. Open a Web browser. Login to the VP Server as administrator.
- 13. Enter your organization name and password. Click **Next** at bottom right to continue.

, 0		<u> </u>		
vpserver.tar.gz found. Installation will migrate from this.				
Organization Name:	V&P Retail			
Administrator Password:	•••••			
Confirm Password:	•••••			

Enter organization name and password

14. In the Select Module page, keep Teamwork Module selected and optionally select the other module(s) you need to activate.



NOTE: You can select more than one module. In this user's guide only the Teamwork Module will be covered. If you want to know the details about the other supported modules, please check from their user's guides.
15. Click Configure Database/Module at bottom right. The Configure Database page appears.

16. There is data that VP Server needs to make persistent, such as your login name, password, server repository path, etc. All these have to be stored in a database. You need to prepare such database and fill in the connection information in this page. First, select your database management system from the **Database** drop down menu.

DATABASE SETTING		_
Database: Embedded Change[?]		

Database setting

- NOTE: If you do not have a database available and if you just want to run Teamwork Server for evaluation, you may select **Embedded DB** as database, which is a ready-to-use database management system built into the server. In other words, no additional database setup has to be made by choosing Embedded DB. However, it is NOT recommended to use Embedded DB for production purpose as it is a bit limited in database size.
- 17. Click **Configure Module** at bottom right. Specify the folder path of repository. Repository is where the project files will be stored. If you are uncertain, just leave it unchanged.



Enter repository folder

- 18. Click the **Browse** button in the **License Key** section and import the license key of the new Teamwork Server. Click **Configure Teamwork Module** at bottom right.
- 19. The users added and defined in old Teamwork Server is listed here. Enter their Email addresses and new passwords.

The existing users an and/or passwords.	e listed below. You can optionally cha	nge their Email addresses (i.e. login na	me)
		and password, please leave both the E address, you MUST enter the passwor	
either enter the old pas		Province	
ither enter the old pas Display name	Email (Login name)	Password	
		Password	_

Migrate users

20. Click Finish at bottom right to complete the installation.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Client operations

Users of VP client products can connect to Teamwork Server to perform teamwork operations.

Checkout

Learn how to get a project from server and start wroking.

Commit

Learn how to commit local modifications to server.

Update

Learn how to get others changes from server.

Branching Learn how to create a branch.

Tagging Learn how to create a tag.

Revert modifications Roll back local modifications.

Roll back past revision changes

Undo changes of previous revision(s).

Export revision

Export project from past revision(s).

Managing Teamwork Files

Add, commit teamwork files in Teamwork Files pane

Open project from VP Teamwork Server

Checkout project is a process done by team members, for getting a project from repository to start working with. Team members can login into the server and then checkout the project(s) to work with, provided that they have the permission to do so, as granted by administrator. After that, open to start working on it.

- 1. Select **Team > Login** from the toolbar
- 2. Enter the cloud entry points, email and password to login to the VPository. If you are using Teamwork Server, click **Login Teamwork Server** and then enter the host, email and password to login.
- 3. From now on you can open a project from server by selecting **Project > Open** from the application toolbar. Then, double click on a project thumbnail to open the project.



Open project

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Commit

Commit refers to the process of uploading local modifications to the server. As team members make changes in a project, they can share their works by committing those changes to the server. By committing, changes are merged from working copy to server copy. During merging, a conflict may be caused when there is a contradiction between team members. Decision have to be made whether to keep the current modified copy (i.e. overwrite) or to accept others' copy (i.e. revert). All conflicts have to be solved before proceeding to commit. To commit changes:

- 1. Select **Team > Commit** from the toolbar.
- 2. If the change you made contradicts the change made by another team member, this will result in a conflict. You must resolve all the conflicts in order to continue. For details, read the <u>Resolving conflicts</u> section below. Clear the conflicts, if any, and continue.
- 3. The Commit window displays the changes to be committed to the server. Click Commit to proceed.

Overview of Commit window

😵 Commit	×
	5 G Filter: Commit and Update Commit Update Update Commit and Update
7 Somer G(School -> Student) School	Local change Compare Compare School -id : String -name : String -name : String
	1
Project name: School (Facts) 12 Checkout revision: 2 13 Edit the commit comment:	Checkout time: Nov 24, 2016, 8:42:23 AM 14 Latest server revision: 2 15
	16 17 Commit Cancel

The Commit window

No.	Name	Description
1	Diagrams tab	The diagram level changes to be performed when you execute commit.
2	Model Elements tab	The model element level changes to be performed when you execute commit.
3	Nicknames tab	The changes of nickname to be performed when you execute commit.
4	Files tab	The file changes to be performed when you execute commit.
5	Changes tab	All the changes to be performed when you execute commit.
6	Filter	When you commit, local changes will be merged to the server copy and meanwhile, changes in server copy will be merged to the local copy, too. The filter allows you to filter the tree on the left hand side to list the commit changes, which are changes to perform on server copy, and/or update changes, which are changes to perform on local copy.
7	Expand All	Expand the tree nodes in the tree below.
8	Collapse All	Collapse the tree nodes in the tree below.
9	Tree	List out the changes to be performed when you execute commit.
10	Compare	Click this button to compare local and server copy side by side.
11	Preview	The preview of the element as selected in the tree on the left hand side.
12	Project name	Name of current project.
13	Checkout revision	The number of current checkout revision.
14	Checkout time	The time for latest checkout.

15 Latest server revision	The number of latest revision in the server.
16 Commit comment	You can give a comment for your current commit by typing here.
17 Commit	Proceed committed
18 Cancel	Cancel committing and close the window.

The description of **Commit** window

Committing multiple projects

Instead of commtting a single project, you can commit multiple project files at the same time, for those listed in the **Teamwork Client** window as managed projects.

1. Select **Team > Utilities > Open Teamwork Client...** from the toolbar.

- 2. From the list on the left hand side, select the projects to commit.
- 3. Right click on the selection and select **Commit...** from the popup menu.

Resolving conflict

If the change you made contradicts with the change made by another team member, this will result in a conflict. For example, your colleague has renamed a class from School to University and performed a commit, and then you rename the same class to College and perform a commit. This produces a conflict.

When a conflict occur, you must resolve it in order to continue committing. You have to resolve conflict either by overwriting or reverting the change. Overwrite means to adopt the server copy's change, while Revert means to adopt the local's change.

Commit	×
There is 1 conflict:	
RUniversity	Local change and Server update University id: String -name: String
	4 Open Specification
5	
	Local change: College 6
	Original value: School
	Server value: University 8
	Overwrite by local Revert to server
Show conflicts only 9	10 11 12 13
	Next Cancel

Conflicts when committing

No.	Name	Description	
1	List of change (action)	List of changes to be performed. Initially only conflicted changes are listed. You can uncheck Show conflicts only to list all changes.	
2	Preview	The preview of the element as selected in the tree on the left hand side.	
3	Conflicted properties	The properties that cause conflicts are listed in this panel.	
4	Open Specification	Click on this button to open the specification of element selected in the tree on the left hand side.	
5	Property name	The names of conflicted properties.	
6	Local change	The value of property in local project copy.	
7	Original value	The value of property before changed. In other words, it is the value in checkout copy.	
8	Server value	The value of property in server project copy.	

9	Show conflicts only	Check it to list only conflicted changes in the tree on the left hand side. Uncheck it to list all changes.
10	Overwrite by local	Click on this button to adopt the source copy.
11	Revert to server	Click on this button to adopt the target copy.
12	Preview	Click this button to continue committing.
13	Cancel	Cancel committing and close the window.

The description of **Commit** window when have conflicts

Update

Update is the process of refreshing your current copy by merging changes that others have made and committed previously to server. Similar to commit, update is a process of merging differences instead of overwriting. When any of your changes contradicts the changes others have made, you will be asked to resolve conflict. All conflicts have to be resolved before proceeding with updating. To update:

- 1. Select Team > Utilities > Open Teamwork Client... from the toolbar.
- 2. If the change you made contradicts the change made by another team member, this will result in a conflict. You must resolve all the conflicts in order to continue. For details, read the <u>Resolving conflicts</u> section below. Clear the conflicts, if any, and continue.
- 3. The Update window displays the changes to be made upon updating. Click Update to proceed.

Overview of Update window



The Update window

No.	Name	Description
1	Diagrams tab	The diagram level changes to be performed when you execute update.
2	Model Elements tab	The model element level changes to be performed when you execute update.
3	Nicknames tab	The changes of nickname to be performed when you execute update.
4	Files tab	The file changes to be performed when you execute update.
5	Changes tab	All the changes to be performed when you execute update.
6	Expand All	Expand the tree nodes in the tree below.
7	Collapse All	Collapse the tree nodes in the tree below.
8	Tree	List out the changes to be performed when you execute update.
9	Preview	The preview of the element as selected in the tree on the left hand side.
10	Open Specification	Click on this button to open the specification of element selected in the tree on the left hand side.
11	Property name	The name of conflicted property.
12	Server update	The value of property in server project copy.
13	Original value	The current value of property (before updating).
14	Update	Proceed updating
15	Cancel	Cancel updating and close the window.

The description of Update window

Updating multiple projects

Instead of updating a single project, you can update multiple project files at the same time, for those listed in the **Teamwork Client** window as managed projects.

- 1. Select Team > Utilities > Open Teamwork Client... from the toolbar.
- 2. From the project list on the left hand side, select the projects to update.
- 3. Right click on the selection and select **Update...** from the popup menu.

Resolving conflict

If the change you made contradicts the change made by another team member, this will result in a conflict. For example, your colleague has renamed a class from School to University and performed a commit and then you rename the same class to College and perform an update. This produces a conflict.

When a conflict occurs, you must resolve it in order to continue updating. You have to resolve conflict by overwriting or reverting the conflicted change. Overwrite means to adopt the server copy's change, while Revert means to adopt the local's change.

Update School (Facts)	×
There is 1 conflict:	Local change and Server update
<mark> University</mark>	University -id : String -name : String -name : String -name : String -name : String -name : String
	Cpen Specification
	Local change: College 6
	Original value: School 7
	Server value: University 8
	Overwrite by local Revert to server
	10 11
Show conflicts only 9	12 13 Next Cancel

Conflicts when updating

Name	Description
List of change (action)	List of changes to be performed. Initially only conflicted changes are listed. You can uncheck Show conflicts only to list all changes.
Preview	The preview of the element as selected in the tree on the left hand side.
Conflicted properties	The properties that cause conflicts are listed in this panel.
Open Specification	Click on this button to open the specification of element selected in the tree on the left hand side.
Property name	The name of conflicted property.
Local change	The value of property in local project copy.
Original value	The value of property before changed. In other words, it is the value in checkout copy.
Server value	The value of property in server project copy.
Show conflicts only	Check it to list only conflicted changes in the tree on the left hand side. Uncheck it to list all changes.
Overwrite by local	Click on this button to adopt the source copy.
Revert to server	Click on this button to adopt the target copy.
Next	Click this button to continue updating.
Cancel	Cancel updating and close the window.
	List of change (action) Preview Conflicted properties Open Specification Property name Local change Original value Server value Show conflicts only Overwrite by local

The description of Update window when have conflicts

Reminder of updating

When your teammates have committed their work to server, you will see a notification appear at the bottom right of Visual Paradigm window, reminding you to perform an update to obtain the changes. By clicking Update, the latest changes will be updated from server to your project. The effect is like performing a manual update but without the need to go through the menus/toolbars.



Update notification

Branching

In terms of team collaboration, a trunk refers to the main stream of development. If you create a new project, you will spend the majority of your time making changes and committing them to the trunk of your repository.

Branch is defined as a copy of work derived from a certain point in the trunk. It sets up an extra space for users to work on and make modifications without disturbing the trunk. As soon as the modifications in branch are done, you can merge it back to the trunk.

Creating a branch

- 1. Select Team > Utilities > Branch... from the toolbar.
- 2. When the **Create Branch** window appears, enter its name in the **Branch Name** field for your new branch and select whether to start working on the branch or to stay in trunk. Click **OK** to confirm.

Create Branch Please input the name for the new branch. You can start working at the new branch or keep working at the trunk.	×
Branch Name: Mode Re-structuring Checkout branch Start working in branch Stay in trunk I mean revision in the repository Specific revision in the repository Show Log	Structure Preview: Structure Preview: Attractions Attr

The Create Branch window

The three options in the drop-down menu are **Start working in branch**, **Checkout branch** and **Stay in trunk**. Select **Start working in branch** means you create, checkout and open a new branch and then start working on it. Select **Checkout branch** means you create and checkout a new branch but just keep it in repository for working on it later on. Select **Stay in trunk** means you create a new branch but do not check it out and do not show it in repository either.

NOTE: For Teamwork Server, you can create branch from a specific revision of trunk by selecting **Specific revision in the repository** and entering the revision number. On the other hand, select **HEAD revision in the repository** if you want to create a branch from the latest revision in trunk. Finally, click **OK** button to confirm.

Merging a branch

When the development activity of branch has been completed, you can optionally merge the branch back to trunk. To merge:

- 1. Work in trunk. Select **Team > Utilities > Merge...** from the toolbar.
- 2. When the Merge window appears, select the branch you want to merge to the working trunk. A specified revision of project can be merged both from/to by selecting From Revision and entering the revision number of from and/or to revision. You can also click on the Show Log... button to popup a window with revisions listed and then select the revision from the list. Click OK to continue.

😵 Merge	×
From: E 127.0.0.1:1999 E School (Facts) E to Mode Re-structuring	
All revisions except those merged From revision To revision To:	
trunk	
Merge	Cancel

The Merge window

Tagging

Tag refers to a named version of your work at a point of time on the trunk. The best application of a tag is to create it for every major release or milestone. Note that you cannot merge a tag to the trunk nor commit it to the server.

To create a tag:

- 1. Select **Team > Utilities > Tag...** from the toolbar.
- 2. In the Create Tag window, enter the name of the new tag in the Tag Name field. Click OK to confirm.

ag Name: Version 1.0	Structure Preview:	
	- 💽 School (Facts)	~
Create copy in repository from:	🏠 Mode Re-structuring	
	Version 1.0	
HEAD revision in the repository	🤶 Securities Trading Platform	
O Specific revision in the repository Show Log	👰 Shopping Cart	
	👰 Simple Inventory Management	
	🔮 Social Media	
	🔮 Supermarket App	
	🔮 Support [INTERNAL]	
	🔮 SysML-Fuel-Example	
	🔮 Tax Payment	
	👰 The Eastern Conference	
	- 🧕 The Post Office	~

The Create Tag window

NOTE: For Teamwork Server user, check **HEAD revision in the repository** if you want to create a tag from the latest revision of trunk while check **Specific revision in the repository** if you want to create a tag from a specific revision.

Revert local modifications

You can undo all the non-committed modification you made in the local project copy. The operation of giving up non-committed modifications is called *Revert*. To revert:

- 1. Select **Team > Utilities > Revert Local** from the toolbar.
- 2. Click **Yes** when you are asked for confirmation.

Roll back past revisions changes

Visual Paradigm maintains the histories of changes team members made. If changes were made by mistake, you can undo it by performing a revert on the revision where the change was made in.

Select **Team > Utilities > Open Teamwork Client...** from the toolbar to open the **Teamwork Client**. In **Teamwork Client**, all your project's revisions are shown in **Project revisions** under **Revisions** tab. Select the number of project's revisions you want to list from the drop-down menu **Show**. Select the revision(s) that contain the unwanted changes and click **Revert Revisions**.

Project [<u>D</u> etails	Revisions				
Show:		Last 10 🗸		Mod	lified model e	lements:
Project re	evisions:				Name	
-	-		a	- 5	School	
Rev.	Memb	er	Date Time		Student	
4	Derek		Nov 24, 2016, 8:45:06 AM	- 5		
3	Derek Derek		Nov 24, 2016, 8:44:49 AM Nov 24, 2016, 8:42:23 AM			
1	Derek		Aug 23, 2016, 2:22:28 PM	Mod	lified diagram	is:
	Derek		Hug 25, 2010, 2:22:20 PM	-11	Name	
					Domain	
					Name Student	Diagram Domain
Ope	n	Export	Revert Revision	-	School	Domain
ommit Co	omment		elected revisions	- 5	1	Domain
unini ca	Jinnen		Il revisions from repository	Mod	lified files:	
	L	exporta	rensions non repository		Name	

Revert a revision

A new revision will be created for the result of reverting. Therefore, you are asked to commit here. Sometimes, the undo action may cause a conflict with a more recent revision or revisions. Just like the normal commit process, you must resolve all the conflicts in order to continue committing. You have to resolve conflict either by overwriting or reverting the change. Overwrite means to adopt the server copy's change, while Revert means to adopt the local's change.

Related Resources

- New to Visual Paradigm? We have a lot of UML tutorials written to help you get started with Visual Paradigm
- <u>Visual Paradigm on YouTube</u>
- Visual Paradigm Know-How Tips and tricks, Q&A, solutions to users' problems
- Contact us if you need any help or have any suggestion

Export revision

You can export revision(s) from server to your machine for checking the project content of certain phase of development. You can export specific revision, or all revisions.

Export the selected revision

- 1. Select Team > Utilities > Open Teamwork Client... from the toolbar.
- 2. In the Teamwork Client window, open the Revisions tab.
- 3. Select the revisions(s) you want to export under **Project revisions**. Click **Export** and choose **Export selected revisions...** from the pop-up menu.

Project [<u>D</u> etails	Revisions				
Show:	[Last 10 🗸		Mod	lified model e	lements:
Project re	evisions:				Name	
				٦ 🗸	School	
Rev.	Memb	er	Date Time		Student	
4	Derek		Nov 24, 2016, 8:45:06 AM			
3	Derek		Nov 24, 2016, 8:44:49 AM			
2	Derek		Nov 24, 2016, 8:42:23 AM	Mod	lified diagram	ns:
1	Derek		Aug 23, 2016, 2:22:28 PM		Name	
					Domain	
				Mod	lified diagran	elements:
					Name	Diagram
					Student	Domain
Ope	×n	Export	Revert Revision		School	Domain
· · ·		-				Domain
Commit C	omment		elected revisions		lified files:	
I		Export a	Il revisions from repository	MOC		
I					Name	
I						
I						
I						
,						

Export selected revision

4. In Select Directory window, select an existing folder or make a new folder for storing the selected revision(s). Click OK to proceed.

Export all revisions from repository

- 1. Select Team > Utilities > Open Teamwork Client... from the toolbar.
- 2. In the Teamwork Client window, open the Revisions tab.
- 3. Click Export and choose Export all revisions from repository... from the pop-up menu.
- 4. In Select Directory window, select an existing folder or make a new folder for storing all revisions. Click OK to proceed.

Related Resources

- New to Visual Paradigm? We have a lot of UML tutorials written to help you get started with Visual Paradigm
- <u>Visual Paradigm on YouTube</u>
- Visual Paradigm Know-How Tips and tricks, Q&A, solutions to users' problems
- Contact us if you need any help or have any suggestion

Managing Teamwork Files

When modeling, there may be external resources you want to attach to a model which help to describe it in detail or include data that cannot be modeled within the tool, like a text document. For example, you may want to attach a scanned image of a transaction receipt to a diagram that describes the transaction process so that the analyst can design the new system based on the image. Or maybe an image file showing the user's expectation of the user interface.

The reference function enables you to add file references to model elements and diagrams. You, as a user who work in a team-based environment with VPository/Teamwork Server do not need to copy any referenced files for other team members to open. Instead, you can commit your model along with the referenced files to the server by referencing a **teamwork file**. Teammates can then get the referenced files from server and open them in their environment.

In VP, there is a folder under the workspace for storing files that are readily being committed to VPository/Teamwork Server for versioning. Those files are called **teamwork files**. The file revision will follow the model, i.e. whenever you open a particular revision of work from server, the file of that revision will be obtained and thus there is always a consistency between the file and the design.

NOTE: "Teamwork Files" is supported by VPository and Teamwork Server Corporate Edition.

Opening the Project Browser for Teamwork Files management

The **Project Browser** is where you can browse and manage the Teamwork Files. To open the **Project Browser** for the management of Teamwork Files:

1. Select View > Project Browser from the toolbar or press Ctrl-Shift-B.

Dash	Project	UeXceler [Diagram	View	Team	Tools	Modeling	Window Help
		Layers	+					Spell Checker
Project	Panes	🔛 Styles	Zoom	Zoom	Zoom	L J Zoom to	Grid	Highlight Connectors
Browser	> Paries	Full Screen	In	Out	100%	Region	~	S Model Indicator

Opening Project Browser

```
2. Open the Files page.
```

	e pagei			
Diagrams	Model Structure	Files	My Recent	Team Recent
	Sele	ecting the Files pa	age	

The folder structure is listed on the left hand side of the screen, while the files and sub-folders are listed on the right hand side.

Creating a folder

You can create a folder for managing files. To create a folder:

1. Select the parent folder from the folder list on the left hand side. If you want to create a folder at root level, select the project node.

📑 🛅 🗁	2
🔲 My Project 💦	
145	
	I
Select proiect root	node

2. Click on the **New Folder** button on top of the folder list.

*	2
New Folder	

Create a folder

3. Enter the name of the new folder and click **OK** to confirm.



Entering folder name

A new folder is created under the selected node.

📑 📑 🗁	2
🔻 🜄 My Project	
🛻 design	

Teamwork folder created

Adding a teamwork file/folder

To add a teamwork file/folder is to copy an external file/folder into your project as a teamwork file (or folder).

1. Select the parent folder from the folder list on the left hand side. If you want to add the teamwork file to root level, select the project node.

📑 📑 🗁	2
🕶 🛃 My Project	
🕂 design 📐	
13 ²	

Selecting the parent folder

2. Click on the Add File/Folder button on top of the folder list.

	2
Add File/Folder	
😜 design	

To add a teamwork file/folder

3. In the Add window, select the file or folder to add and click **Open**. You can select multiple files by pressing the **Ctrl** or **Shift** key. When finished, you can see the thumbnails of the selected files and folders listed on the right hand side of the **Project Browser**.



Opening a file

To open a file:

- 1. In the folder list, navigate to the folder where the file is placed in.
- 2. Select the folder.
- 3. The thumbnail of the file you want to open is on the right hand side on the Project Browser. Double click to open it.

Opening the containing folder of file

You can open the containing folder of a teamwork file/folder so that you can access it with file explorer provided by the operating system. Right click on the file/folder and select **Show in Folder** from the popup menu.

Committing teamwork files

You may make use of the commit function to commit teamwork files to VPository/Teamwork Server. When you perform a commit globally (i.e. commit the whole project), teamwork files will get committed. If you want to perform commit on specific teamwork file/folder, right click on it and select **Commit...** from the popup menu.



Commit teamwork files to server

Removing teamwork files

To remove a teamwork file from project, select the file/folder to remove and press **Delete**. Alternatively, right click on the file/folder and select **Delete** from the popup menu.

Revert changes

Revert is the process of discarding non-committed modifications. To revert a file/folder, right click on the file/folder and select **Revert...** from the popup menu. In the Revert window, select the files to revert.

😵 Revert	\times
™ My Project [trunk]	

Revert changes of teamwork files

Copy, Paste and Cut

Copying, pasting and cutting of teamwork file can be done by two ways. One is by hotkey **Ctrl-C**, **Ctrl-V** and **Ctrl-X**. Another one is by right clicking on the file(s) and selecting **Copy**, **Paste** and **Cut** from the popup menu.

Referencing a teamwork file

When you try to add a file reference to a teamwork file, you may manually navigate through the folders to locate the teamwork file to add. Or to speed things up, Visual Paradigm allows you to create a shortcut that brings you to the folder where the teamwork files are stored. In order to have such shortcut, you need to define a user path of project files to create a corresponding shortcut in file chooser. After that, you may add the reference easily.

- 1. Select Window > Application Options from the toolbar to open the Application Options window.
- 2. In the Application Options window, select User Path on the left hand side.
- 3. On the right hand side, click Add... and select Project Files Path from the popup menu.
- 4. Click OK at the bottom of the Application Options window to close it.
- 5. From now on, when you try to add file reference to model elements, you can select the shortcut **Project Files Folder** in file chooser to jump to the folder where the teamwork files are listed.

Select File				×
Look In: 📙 files		~ 🔇 🦻	P 🔜 📰	
Recent Items	design			
E Desktop				
Documents				
This PC				
🔿 Network				
VPProjects				
Project Folder				
Project Files Folder	File Name:		~	
+ 💼 🐟 🗸	Files of Type:	All Files	~	
Description: Enter description here				
			ОК	ancel

Project files folder

Copying the path of a teamwork file

Sometimes, you may want to save a new file to a teamwork folder. In order to do this, you have to know the filepath of the folder, which is what the **Copy Path** feature can help. There are two kinds of path you can copy - full path and short path. Full path is what known as an absolute path. You can save a file to a specific location by providing its full path. On the contrary, a short path is a relative path, which is relative from the project. A sample of short path would be *MyProject\files\MyTWFile.txt*. Compare to full path, short path is short and machine-independent, making it a good method to express a filepath within a team.

To copy the path of a teamwork file, right click on that file and then select **Copy Path**, **Copy Short Path** or **Copy URL**. The path will then be copied to the system clipboard automatically. Here is a description of copy features:

Copy Path - The absolute path of the file

Copy Short Path - The relative path of the file, relative to the root folder that stores the teamwork file

Copy URL - The URL of file. Team members who can access the project can visit the URL directly in their web browser for accessing or downloading the file.



The Copy menus

Synchronizing Design Patterns

In Visual Paradigm, design pattern is a part of diagram that can be used in many different diagrams, thus form a pattern. Design pattern typically shows the shapes and more importantly, the relationships between the shapes. You can define and reuse design pattern in your project, across projects or share with your team members. You can define and apply design patterns on any kinds of diagram.

Once you have <u>defined a design pattern</u>, you can share it with your teammates through synchronizing it to server. Note that the synchronization of design pattern is independent from project commit/update, which means that the only way to have your design patterns available in server is by synchronizing them to server.

To synchronize design patterns:

- 1. Select Team > Utilities > Open Teamwork Client... from the main menu.
- 2. In the Teamwork Client window, select Repository > Synchronize Design Pattern with Server from the menu.

NOTE: Only members who are permitted to configure design pattern can synchronize design patterns. Click here for details about configuring members' permissions.

3. Confirm the changes and click **OK** in the **Pattern Synchronization** window.

PostMania Overview and Setup

What is PostMania?

PostMania allows system designers to share diagrams drawn by Visual Paradigm with others, letting the viewers view the diagrams and to give comments.

Member and Viewer

In PostMania, people who can draw and share diagrams are called "member", while people who can view the diagrams are called "viewer". You will learn more about their differences in this page.

Enabling PostMania

By enabling PostMania, members can share diagrams with others and viewers can view and comment on the design shared. This page shows you how to enable PostMania on an existing project, or when importing a new project.

What is PostMania?

PostMania is a tool bundled with VPository that lets you share the diagrams that you've created in Visual Paradigm with others, and to collect their feedback after they have view your diagrams. Very often, you share diagrams with your partners, clients or colleagues to let them confirm your design or clarify design issues. They can view your diagrams on the web, without any rights to edit them. Here are some of the use cases of PostMania:

- Business user reviews and approves business process design
- Business user reads the latest business process design for working guidelines
- Business user request changes to process plan
- Developer views the latest class diagram to gain get up-to-date system specification and design guideline

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Member and Viewer

There is an important concept that you must be clear about when using PostMania. In PostMania, the people who can draw diagrams (in Visual Paradigm) and share them with someone else are known as "member", while the people who can only view the diagrams with PostMania are known as "viewer". Members are usually the designers or developers, while viewers are typically the clients, stakeholders and end users. In terms of their rights, member can edit, share and post comments on diagrams, in Visual Paradigm. Viewers can view and post comments on only diagrams shared by members, through web browser or PostMania Android apps.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Enabling PostMania

PostMania is a project-based feature, meaning that you can have one project with PostMania enabled, and other with PostMania turned off. By enabling PostMania, members can share diagrams with others and viewers can view and comment on the design shared. You can enable PostMania on an existing project, or to enable it at the moment the project is imported into VPository.

To enable PostMania on an existing project:

- 1. Open a web browser.
- 2. Visit your VPository cloud entry/Teamwork Server administration page.
- 3. Login VPository/Teamwork Server. Make sure you have project **update** right.
- 4. Select Projects from the menu on the left hand side.
- 5. Move your mouse pointer over the row of the project that you want to enable PostMania, and then click **Edit**. Note that trunk, branch and tag are non-related. In other words, enabling PostMania in trunk project will not enable PostMania for branches, and posts created in trunk project will not appear in branch.

ATM	1	9	Aug 23, 2016	Pos Task UeX
Airfare [Add Member] [<u>Edit]</u>	1	9	Aug 23, 2016	Task UeX
Android Phone Wireframes	1	9	Aug 23, 2016	Pos Task UeX

Edit project

6. Check Enable PostMania under the Project tab.

Project	Members	Rev		PostMania	Branches		
Project Na	ime: *		Airfare				[Delete Project]
Relative P	roject Directory	. •	Airfare				
Enable	Tasifier	[?]	http://127	.0.0.1:1999/tasifier	jsp#proj=3		
Enable	UeXceler	[?]	http://127	.0.0.1:1999/uexcel	er.jsp#proj=3		
Enable	Postmania	[?]	http://127	.0.0.1:1999/postma	ania.jsp#proj=3		
The web ba 9.5+	sed services requ	iire any	of the follo	wing browsers: IE9)+, Firefox 4.0+, S	afari 5.0+, Chrome 5.0+ and O	pera

Enable PostMania

7. Click Save. Team members can access PostMania by visiting the URL on the right.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

PostMania - Member Guide

Sharing Diagram

To share a diagram with someone means to let him or her view the shared diagram and to allow him or her to give comments on the diagram, or shapes in the diagram. This page shows you how to share diagram with others, in PostMania.

Getting Notified of New Posts

When someone, either a member or viewer, has created/replied a post in a diagram shared by you or you followed, or if you are selected to be the person to notify during a post is created, you will be notified. This page provides you with more details.

Posting and Replying

If you want to say something about a diagram or its content, no matter for what purpose, can create a post in PostMania. This page shows you how to create a post and reply a post in PostMania.

Following Post

If you want PostMania to inform you that certain post has been replied, you can follow that post. This page shows you how to follow post in PostMania.

Managing Shared Diagram (Viewer Based)

Know if someone has viewed a diagram that you shared and if so, when did he/she last view the diagram. We will show you how to do this in this article.

Managing Diagram Viewers

Know if someone has viewed a diagram that you shared. In this article, we will show you how to do this in a shared diagram.

Searching a Post

When you want to read the conversation made earlier but have no idea in which diagram and shape the conversation was posted to, you can search it out with a keyword. This article shows you how it works.

Sharing Diagram

To share a diagram with teammate means to let him or her view the shared diagram, either through a web browser or through mobile device, and to allow him or her to give comments on the diagram, or shapes in the diagram.

Sharing works in diagram based, meaning that when you share a diagram with someone, he/she can only view that diagram, but not the other diagrams, unless the other diagrams have also been shared.

Sharing a diagram through invitation

To share a diagram:

- 1. In Visual Paradigm, open the diagram you want to share.
- 2. Make sure the diagram have been committed to the server. You can only share a diagram that has been committed to server before.
- 3. Open the action bar by clicking on the tiny button on the right hand side of the diagram, near the scrollbar, if exist.



Open the action bar

4. Open the **PostMania Topic Pane** button by clicking on its button in the action bar.



Opening PostMania Topic Pane

5. At the top of the **PostMania Topic Pane**, click **Share** and then select **Invite Viewers...** from the drop down menu.



Invite viewers

6. Enter the name and/or the Email address of the people to share with. If a person to invite is an existing viewer/member, you just need to enter his name and pick him up from the drop down menu. If he is not currently a viewer, please enter his email address. PostMania will send invitation Emails all people specified, to invite them to join PostMania for viewing and commenting on the diagram to be shared.

Invitation	×
Invite others to view this diagram	
kary@demo-vp.com ×, alan@demo-vp.com	
Message (optional)	
	Send Invitation Email Cancel

Entered the name and email address of invitees

- 7. You can optionally include a message, which will be included in the email PostMania send out.
- 8. Click Send Invitation Email. PostMania will send the invitees invitation Emails in three minutes.

NOTE: If the invitee is an existing viewer, and has opened the notification page/view of PostMania, either in a web browser or in Android apps, he/she will not receive the email notification.

In three minutes, invitees will receive an Email, with subject " %NAME% has shared a diagram with you" where %NAME% is the person who shared the diagram. He/she has to:

- 1. Click on Accept Invitation in the Email to open the New Viewer Form in web browser.
- 2. Enter the password and click Accept Invitation in the form. Then, he/she will be redirected to the diagram shared.

Sharing a diagram by link

To share a diagram with someone, you can enter his name and email address and send him an invitation, which was described above. Besides, you can give him a URL to open the sharing diagram in web browser. If he is already a viewer/member, he will be prompted to login to his VPository account when he visit the given link. Once logged in, he can view the diagram you shared. If he is not a viewer, he will be asked to join PostMania as a viewer to view the shared diagram.

To share a diagram by link:

1. At the top of the **PostMania Topic Pane**, click **Share** and then select **Share by Link** from the drop down menu.



Share diagram by link

2. In the popup window, click **Generate Link**.

3. Copy the link by clicking Copy to Clipboard. Now, you can ask others to visit the link to view the diagram.

٩	Share Diagram by Link	\times
	Users with access to this link can browse this diagram on web browsers.	
	https://demo-vp4.vpository.com/postmania.jsp#share=k4gj2hpn8lljjalairio8h03a6gf3xte	
	Copy to Clipboard	

Copy diagram link

Selecting the layers to share/not share

If your diagram has multiple diagram layers, you can select the layer(s) to share in PostMania, or to exclude the layers that you do not want to share. Shared layers will be visible when the diagram is being viewed in PostMania. To select the layer to share/not share: 1. At the top of the **PostMania Topic Pane**, click **Share** and then select **Share Layers...** from the drop down menu.

PostMania Topics	
	Invite Viewers
	Share by Link
	Viewer List
	Share Layers

To select the layer to share/not share

In the **Share Layers** window, select the share layer option. Here is a description of the four options:

Follow diagram: Follow the visibility setting of layers. Layers that are currently visible are shared, whilst hidden layers will not be shared. In other words, what you can see will be what the viewer can see in PostMania.

All layers: Both visible and hidden layers will be visible in PostMania

Specific layer only: Select the layers to share. Non selected layers and any newly created layers will be invisible when the diagram is being viewed in PostMania.

Exclude specific layers: Select the layers to not share. Non selected layers and any newly created layers will all be visible when the diagram is being viewed in PostMania.

Share Layers	×
Share layer option: Follow diagram Follow diagram All layers Specific layers only Exclude specific layers	OK Cancel

Selecting a share layer option

3. Click **OK**. The change will now be reflected in PostMania.

Disabling a shared link

2.

For security reasons you may want to disable a shared link once it has been visited by the authorized person. To disable a shared link:

- 1. At the top of the PostMania Topic Pane, click Share and then select Share by Link from the drop down menu.
- 2. In the popup window, click **Disable**. Note that by disabling the URL, new attempts to browse the diagram with that URL will be denined. Yet, viewers who have browserd the diagram before will remain accessible to the diagram.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Getting Notified of New Posts

When a viewer has created/replied a post in a diagram shared by you, you will see a notification in the status bar, like this:

			~
$\rightarrow \stackrel{\scriptstyle }{\Phi}$	New Post		
		1	Ż
	Notification received		

The number indicates the number of unread notifications. The number will be decreased once you have checked a notification. To check a notification, click on the **Message** icon in the status bar to open PostMania.

The left hand side of PostMania lists the notifications you received, ordered by the receive date and time, with the latest notification appears at the top and the earliest one comes last. You can click on a notification to have an overview of that notification.

Watch Brace	celet Manufacturing - Visual Paradigm Enterprise Edition	- 🗆 🗙
Project Diagram View Team Tools Modeling	g Windows Help	
	Format Format Copier Format Copier Group Ungroup Link Junp Bookmarks	
		(프] 🔚
🖾 PostMania	Estimate Cost	Open 🖻
John Estimate Cost We don't need any prior estimation of cost. Please remove this task. Vincent One of new 1	Estimate Cost Es	•
	Vincent We don't need any prior estimation of cost. Please remove this task.	now
	Click to reply	

PostMania

The overview is displayed on the right hand side of PostMania. It consists of a thumbnail of diagram, and a chunk of unread conversation. Note that the content of a notification consists of only the unread portion of the entire conversation. If you want to view the full conversation, click **Open** at the top right corner of the PostMania. By opening a post, the related diagram will be opened, with the post opened in the **PostMania Topic Pane**, on the right of the diagram. If the post was created around a shape, that shape will be selected.

You can also reply to a post by entering your message below the conversation and then click Post.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Posting and Replying

If you want to say something about a diagram or its content, no matter for what purpose, can create a post in PostMania. You can create a post to report status ("I have approved."), to ask for action ("Please implement this."), ask whatever questions ("When do you need this?"), seek for confirmation ("May I remove this from the model?"), request changes ("Fix it please"), etc.

Posting to diagram

- 1. Open the diagram that you want to create a post in it.
- 2. Click on the diagram background to make sure no shape has been selected.
- 3. At the bottom of the PostMania Topic Pane, click New Post.
- 4. You see a purple mark symbol appear on the diagram. You can add marks to different parts of the diagram for the different areas of concern. To position a mark, simply drag it to the desired position.



Repositioning a mark

To add a new mark, drag the mark symbol at the bottom right of the diagram, and release it at the desired position.



Create a mark

5. In the PostMania Topic Pane, enter the subject of post.

6. Enter the comments of the marks.



Entering comments

You can optionally attach file reference to each of your post content. To attach file(s), click on the attachment button at the bottom of the post box.



To attach a file to a post

7. Specify the member to notify in the To field. Selected members will receive Email notification about your post.

	New Post	
	То	^
	Kary ×, A]	
	Alan	
1:	we are running out of stock, so its not	
	Specifying the team member(s) to no	otify

8. Click **Post**. Members selected to notify and members who followed the diagram will receive Email notification about your post.

Posting to shape

- 1. Open the diagram that contains the desired shape.
- 2. Select the shape.
- 3. At the bottom of the PostMania Topic Pane, click New Post.
- 4. In the **PostMania Topic Pane**, enter the subject of post.
- 5. Enter the post content.



Entering post contents

6. Specify the member to notify in the To field. Selected members will receive Email notification about your post.

New Post		
То		
Kary × , A		
Alan	2	
	-0	
	will come to our company daily,	

Specifying the team member(s) to notify

7. Click Post. Members selected to notify and members who followed the diagram will receive Email notification about your post.

Posting to references of a shape

You can also post comments to references of a shape, via the References tab of the specification window.

- 1. Open the specification window of shape by right clicking on the shape and selecting **Open Specification...** from the popup menu.
- 2. Open the **References** tab.
- 3. Create post in the **PostManic Topic Pane** on the right hand side of the specification window.

		Task S	pecificatior	1		
General Procedure Diagrams Trac	ations Chart Relations s Assignments Properties reability References	Input Sets Output S Project Management	ed Values ets IO Rules Quality	Constraints Resources Comments	New Post To Select users	1
Name	Path	Description	n	*	Subject Issue Shipment Notice Enter message Please include the required template files for this task.	
Reset				OK	Cancel Apply H	telp

Creating a post to shape's references

Posting to use case flow of events

You can also post comments to the flow of events of use case.

- 1. Open the flow of events editor of use case by right clicking on the use case and selecting **Open Use Case Details...** from the popup menu.
- 2. Open the Flow of Events tab.
- 3. Create post in the **PostManic Topic Pane** on the right hand side of the procedure editor. You can select the step to comment, on the left hand side of the working procedure editor.

Buy Books		S New Post
Scenario Jaco JJSearch book, 12 Open a	Details Requirements Daggars Test Plan References Description • + - <	To Extensions Subject Bay Books Exter message Convert
+ X * ♥ ĝ	6. SYSTEM Display "payment success" screen	

Select steps to comment

Posting to working procedure of BPMN task/sub-process

You can also post comments to working procedure of BPMN task/sub-process.

- 1. Open the working procedure editor by right clicking on the background of business process diagram and selecting **Show Procedure Editor** from the popup menu.
- 2. Select the desired task/sub-process to browse its working procedure.
- 3. Create post in the **PostManic Topic Pane** on the right hand side of the procedure editor. You can select the step to comment, on the left hand side of the working procedure editor.



Creating a post to working procedure

Replying a post

To reply a post:

1. Open the post to reply. You can open it from the **PostMania Topic Pane** or from the notification page.



Opening a post

2. Enter the content of reply.

Notification required	
1: We need to send notification here. design.	
Kary	le now
To: Kary ×, Select users	
Changed. Please review.	
D	
Post	Cancel
Entering reply	y content

3. You may specify the member to notify in the **To** field. Selected members will receive Email notification about your post.

4. Click Post.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Following Post

If you want PostMania to inform you when certain post has been replied, you can follow that post. By following a post, you will receive a notification when reply has been made to that post, like this:

			~
$\rightarrow \stackrel{\scriptstyle \leftarrow}{\Phi}$	New Post		
		1	Ż
	Notification received		

The number indicates the number of unread notifications. The number will be decreased once you have checked a notification. To check a notification, click on the **Message** icon in the status bar to open PostMania.

To follow a post:

1. Open the post to reply. You can open it from the **PostMania Topic Pane** or from the notification page.

PostMania Topics		<
Notification required	👤 Kary	^
We need to send user a notification here. Please	le now	
revise your design.		

Opening a post

2. At the bottom of the **PostMania Topic Pane**, click **Follow**.

Click here to reply	
Follow the	

Follow diagram

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Managing Shared Diagrams (Viewer Based)

You may want to know if someone has viewed a diagram that you shared and if so, when did he/she last view the diagram. You may also want to unshare a diagram from someone who no longer take part in the development or discussion of that diagram. All these can be achieved by managing shared diagrams in PostMania.

Viewing the diagrams shared with a viewer

To know which diagram has been shared with a viewer, take the steps below.

- 1. Select Team > PostMania from the toolbar to open PostMania.
- 2. Click on the arrow button next to the word PostMania at the top left corner. of the screen. Select Sharing from the drop down menu.



Selecting Sharing

3. Now, you will see a list of viewers on the right hand side. Those are viewers (or members) who have been shared diagram(s). For each viewer, the diagram(s) that he/she can view are listed in the table.

		Project	's Viewers List	
	Diagram	Last visited	Shared on	Comments made by user
	Registration	July, 7, 2015	July, 6, 2015	1
Alan				
17 - 1 - 1				
	Diagram	Last visited	Shared on	Comments made by user
	Process Order	July, 6, 2015	July, 6, 2015	0
Sandy	Registration	Never Visited	July, 6, 2015	0
	-			

Project's Viewers list

For each diagram row listed in the table, the following information is presented:

Last visited: The date and time at which the viewer last viewed the diagram. Shared on: The date and time at which the viewer has been shared the diagram.

Comments made by user: The number of post the viewer has made for this diagram, or any shape in this diagram.

Unshare a diagram from a viewer

If you don't want to let a viewer to view a shared diagram anymore, unshare that diagram from him/her. To unshare a diagram from a viewer:

- 1. Locate the viewer in the **Project's Viewers List**.
- 2. Select the row of diagram to unshare.
- 3. Click on the arrow button at the last column and select **Unshare** from the drop down menu.

F	Diagram	Last visited	Shared on	Comments made by user	
1	Process Order	July, 6, 2015	July, 6, 2015	0	0
Sandy	Registration	Never Visited	July, 6, 2015	0	More Details

Unshare a diagram from a viewer

4. Choose Yes when are are prompted for confirmation. Note that the viewer will not be able to access the diagram anymore once you've chosen **Yes.** If you want to let him/her view the diagram again you need to share it again.

Managing the viewers of a diagram

You may also want to know the viewers of a particular diagram, or to unshare multiple viewers from a diagram, or to invite multiple viewers to view a diagram. All these can be achieved by taking the steps below.

- 1. Find the row of diagram from any viewers listed in the Project's Viewers List.
- 2. Select that row.
- 3. Click on the arrow button at the last column and select More Details... from the drop down menu.

Process Order July, 6, 2015 July, 6, 2015 0	
Sandy Registration Never Visited July, 6, 2015 0	Unshare

Unsharing diagram from individual viewer To unshare the diagram from a particular viewer:

- 1. Move your mouse pointer over that viewer.
- 2. Click on the tiny cross appear at the top right corner of his/her profile picture.



Unshare diagram from viewer

3. Choose **Yes** when you are prompted for confirmation.

Unsharing diagram from all viewers

To stop sharing the diagram with anyone, click Unshare All. Choose Yes when you are prompted for confirmation.

Invite viewers

1. Click on Invite others.

2. Enter the name and/or the Email address of the people to share with. If a person to invite is an existing viewer/member, you just need to enter his name and pick him up from the drop down menu. If he is not currently a viewer, please enter his email address. PostMania will send invitation Emails all people specified, to invite them to join PostMania for viewing and commenting on the diagram to be shared.

	•
kary@demo-vp.com × , david@demo-vp.com	
Message (optional)	
Send Invi	tation Email

Entered the name and email address of invitees

- 3. You can optionally include a message, which will be included in the email PostMania send out.
- 4. Click Send Invitation Email. PostMania will send the invitees invitation Emails in three minutes.

NOTE: If the invitee is an existing viewer, and has opened the notification page/view of PostMania, either in a web browser or in Android apps, he/she will not receive the email notification.

In three minutes, invitees will receive an Email, with subject " %NAME% has shared a diagram with you" where %NAME% is the person who shared the diagram. He/she has to:

- 1. Click on Accept Invitation in the Email to open the New Viewer Form in web browser.
- 2. Enter the password and click Accept Invitation in the form. Then, he/she will be redirected to the diagram shared.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion
Managing Diagram Viewers

You may want to know if someone has viewed a diagram that you shared and if so, when did he/she last view the diagram. You may also want to unshare a diagram from someone who no longer take part in the development or discussion of that diagram. All these can be achieved by managing shared diagrams in PostMania.

Viewing the viewers of a diagram

To know the viewers of a diagram, take the steps below.

- 1. Open the diagram you want to check.
- 2. Open the action bar by clicking on the tiny button on the right hand side of the diagram, near the scrollbar, if exist.



Open the action bar

3. Open the **PostMania Topic Pane** button by clicking on its button in the action bar.



Opening PostMania Topic Pane

4. At the top of the **PostMania Topic Pane**, click **Share** and then select **Viewer List** from the drop down menu. Now, you will see a list of viewers who can view this diagram.

•	Diagram Viewers			×	
Viewer's List Shared Links					
Viewer	Last visited	Shared on	Shared by	Comments made by user	
Alan 🔛	July, 7, 2015	July, 6, 2015	John	1	
Sandy	Never Visited	July, 6, 2015	John	0	

Viewer list

For each viewer row listed in the table, the following information is presented:

Last visited: The date and time at which the viewer last viewed the diagram.

Shared on: The date and time at which the viewer has been shared the diagram.

Shared by: The person who shared the diagram.

Comments made by user: The number of post the viewer has made for this diagram, or any shape in this diagram.

Unshare diagram from a viewer

If you don't want to let a viewer to view a shared diagram anymore, unshare that diagram from him/her. To unshare a diagram from a viewer:

- 1. Locate the viewer in the Viewer List.
- 2. Select the row of the viewer.
- 3. Click on the arrow button at the last column and select **Unshare** from the drop down menu.

Viewer's List Shared	d Links				
Viewer	Last visited	Shared on	Shared by	Comments made by user	
Alan 🚽	July, 7, 2015	July, 6, 2015	John	1	
👰 Sandy	Never Visited	July, 6, 2015	John	0	0
					Unshare

Unshare a diagram from a viewer

4. Choose Yes when are are prompted for confirmation. Note that the viewer will not be able to access the diagram anymore once you've chosen **Yes**. If you want to let him/her view the diagram again you need to share it again.

Disabling a shared link

For security reasons you may want to disable a shared link once it has been visited by the authorized person. To disable a shared link:

- 1. Open the **Shared Links** tab in the **Diagram Viewers** window.
- 2. Select the link to disable.
- 3. Click on the arrow button at the last column and select **Unshare** from the drop down menu. . Note that by disabling the URL, new attempts to browse the diagram with that URL will be denined. Yet, viewers who have browserd the diagram before will remain accessible to the diagram.

Viewer's List	Shared Links		
Shared by		Links	
John		http://127.0.0.1:1999/postmania.jsp#share=29qh42ddsg9za0zkhqehjp6g2oaiju14	
			Unshare
		Disable diagram link	

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Searching a Post

When you want to read the conversation made earlier but have no idea in which diagram and shape the conversation was made, you can search it out with a keyword.

Searching a post

1. At the top left of the PostMania, enter the keyword in the Search... field.

🔄 PostMania 🔻			
John			
	quotation	Ι	
Searching for the			

word 'quotation'

2. Press the Enter key to perform a search. Search results are listed in the page.

🔄 PostMania 👻	Search Results
John	Place Order Plasse many that the order is somehow connected with the quantation. We need to taken it in factors.
Teck Quotation	Enter Negotiation - Prepare quotation We shall proper a quotation Sefere we error a regardator.
quotation now	Is it a bit too early to produce a quotation at that moment? The customer can reject our 34 mins

Search results

3. You can click on an entry to open it.

Search Results	
Place Order Please ensure that the order is somehow connected with the quotation. We need to trace it in future. Enter Negotiation - Prepare quotation We shall prepare a quotation before we enter a negotiation.	
Is it a bit too early to produce a quotation at that moment? The customer can reject our	34 mins

Opening a post from search resutls

Accessing search history

The history of your previous searches are listed on the left hand side of the search page. You can search a keyword again by clicking on it.



Related Resources

Visual Paradigm on YouTube

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Contact us if you need any help or have any suggestion

PostMania - Viewer Guide

Accepting Invitation

In order to view a diagram shared by a team member, viewer has to join PostMania. This page shows you how to accept an invitation sent from team member.

Vieweing Diagram

In this page, you will see how to browse diagrams in PostMania, and then open a diagram and view it.

Posting and Replying

If you want to say something about a diagram or its content, no matter for what purpose, can create a post in PostMania. Team members are supposed to read your post and take actions accordingly.

Searching a Post

When you want to read the conversation made earlier but have no idea in which diagram and shape the conversation was made, you can search it out with a keyword. This article shows you how it works.

Accepting Invitation

In order to view a diagram shared by a team member, viewer has to join PostMania. Invitation is issued by team member in the form of Email. When a team member shares a diagram with a viewer, viewer will receive an Email, with subject %MEMBER_NAME% has shared a diagram with you.

	support@visual-paradigm.com' 🔶 🐟 Reply 🚸 Reply A		 Archive 🔤	- Julik	G velet
	ohn has shared a diagram with you				
	ohn <john@jy.demo-vp.com> 🗘</john@jy.demo-vp.com>				
To ala	lan@demo-vp.com 🗘			Oth	er Actions
	John has shared a diagram with y	ou			
	Dear Alan,				
	John has shared the following diagram with you in PostMania. invitation to view the diagram. You can also post comments to		the		
	answers to your questions.				
	Diagram: Registration				
	Project: OnlineBookStore				
	Thank you for using PostMania.				
	Best regards,				
	VPository Team				
	Accept Invitation				

To accept invitation:

1. At the bottom of the Email, click on Accept Invitation.

Accept Invitation
This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.
Accept invitation

- 2. This opens the New Viewer Form in the web browser. The display name is filled for you but you may change it.
- 3. Enter the **Password** and **Confirm Password**.
- 4. You can also upload your profile avatar, which is an image that represents you in PostMania and other teamwork features.

New Viewer Form		
Display Name:*	Alan	
Email(Login ID):*	alan@demo-vp.com	
Password:*		
Confirm Password:*	••••••	
Profile Avatar:	Choose File No file chosen	

5. Click Accept Invitation. You are redirected to PostMania, with the shared diagram opened. You can start viewing diagram and posting comments.

I PostMania ×	Vsuil Penaligm 😑 🗖 🗙
← → C 🆀 https://demo-vp4.vpository.com/postmania.jsp#did=5	+ 위 Ξ
C Cetalis Regis	stration 🕈
Bacher	
- D Pisces - Crede Manter - Site Mantenite Card	
् व	

PostMania

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Vieweing Diagram

Opening a diagram

To open and view a diagram in PostMania:

1. At the top left of the PostMania notification page, click on **Sort by Topic** and select **Sort by Diagram** from the popup menu.

🜐 PostMania 🛛 🗙 🔛			Visual Paradigm 🔔 🗖	×
← → C Antps://demo-vp4.vpository.com/postmania.jsp#				Ξ
📔 PostMania -	Overview			
Alan -	Number of new updates:			
Sort by Tople ~	Followed O	Topics O	Shared 3	
	not u			

To browse diagrams

2. The thumbnails of diagrams shared to you are presented on the screen. If the diagram you want to view is in another project, click on the down arrow next to the name of the current project and then select the desired project from the popup menu.

📄 PostMania -	Powered by Viscal Paradigm
Alan -	
Sort by Diagram ~	OnlineBookStore
	OnlineBookStore PaymentGateway
Registration	Online Bookstore
1 John Systerday	1 John Systerday

To switch to another project

3. Click on a thumbnail to open the diagram.



To open a business process diagram

Viewing a Diagram

Once you have opened a diagram, you can view it in PostMania. Here we are going to see some of the functions that help you in viewing a diagram.

PostMania X	X	issal Paradigm 💷 🗖 🗙
← → C Attps://demo-vp4.vpository.com/postmania.jsp#did=5		* ≡
Details	Registration	ft
O		
- D Process Registration - Create Member Recoid - Card - Card		
		

Viewing a business process diagram in PostMania

Zooming

On the top left of screen there are several buttons you can click to zoom the viewing diagram in and out.

lcon	Description		
	Zoom to fit - Click on it to fit the width and/or height of Web browser. Note that if you resize the browser after clicked zoomed, you need to click again to make the diagram size follow the updated width and height of the Web browser.		
-	Zoom out - Click on it to reduce the size of image, hence causing a larger portion of diagram content visible. This is particular useful when the diagram being viewed is very large in size.		
=	Actual Size - Click on it to restore the scale to 100%.		
+	Zoom in - Click on it to magnify the diagram.		
	Description of zoom functions.		

Viewing Different Parts of a Diagram

Usually, diagram is so big that you cannot view everything within the viewing region. Zooming can help but may make the diagram content hard to read. Therefore, in most cases you can view only part of the complete diagram. If you want to view the other parts of the diagram, simply press on the diagram and drag it. You can drag to any direction you want.

Reading Description of Model Elements

Besides diagram, you can read the description of model elements, if specified.

1. Click on the shape you want to read its description. If you want to read the description of diagram, click on the background of diagram.



To read the description of a BPMN task

- 2. At the top of the page, click **Details**.
- 3. The description is then presented at bottom left. When you finish reading, click on the back button to go back to the diagram. You can then select another shape to read its description.



Description of a task

If the shape has references added, you can see the **REFERENCE** tab appear next to the **DESCRIPTION** tab. You may open the tab to review the list of references.

Related Resources

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- Visual Paradigm on YouTube
 - Contact us if you need any help or have any suggestion

Posting and Replying

If you want to say something about a diagram or its content, no matter for what purpose, can create a post in PostMania. You can create a post to request change ("Delete this."), to ask for action ("Please implement this."), ask whatever questions ("When will this be done?"), etc.

Posting to diagram

1. Open the diagram that you want to create a post in it.





Clicking on diagram

3. At the bottom right of the diagram, you can see a purple mark symbol. You can add marks to different parts of the diagram for the different areas of concern. Drag a mark onto the appropriate part of the diagram You can refine the position of mark by dragging it.



Dragging a mark to diagram

4. If necessary, add more marks onto the diagram by repeatedly dragging and dropping the mark onto diagram.



5. In the **PostMania Topic Pane**, enter the subject of post.

6. Enter the messages of the marks.



Entering messages

7. Click Post. Members who followed the diagram will receive Email notification about your post.

Posting to shape

- 1. Open the diagram that contains the desired shape.
- 2. Select the shape.
- 3. Click on the + buttom above the shape.



To create a comment on a shape

- 4. In the **PostMania Topic Pane**, enter the subject of post.
- 5. Enter the post message.

PostMania ×	Visual Paradigm 💷 🗖 🗙
← → C 🎍 https://demo-vp4.vpository.com/postmania.jsp#did=5&sid=NI9sRLKGAqAKahmK&details	*]≡
	New Post
De Process Create Member Peccad Card	Subject Create Member Record
	Enter Message
DESCRIPTION No description.	I suppose we don't need to create such a record manually. Please check.
	Ø

Entering post message

6. Click **Post**. Members who followed the diagram will receive Email notification about your post.

Posting to references of a shape

You can also post comments to references of a shape, when viewing the details of a shape.

- 1. Open the diagram that contains the desired shape.
- 2. Select the desired shape.



Selected System shape

- 3. At the top right of the page, click **DETAILS**.
- 4. The description is then presented at bottom left. Open the **REFERENCES** tab.



- 5. To say something about the references, click **New Topic** on the right hand side.
- 6. Enter the subject and message.

New Post	
Subject Company logo outdated.	
Enter Message	
Please provide a newer logo.	
D	1.

Creating a post to shape's references

7. Click **Post**. Members who followed the diagram will receive Email notification about your post.

Posting to use case flow of events

- You can also post comments to the flow of events of use case.
- 1. Click on the desired use case in a use case diagram.
- 2. At the top right of the page, click **DETAILS**.
- 3. Open the FLOW OF EVENTS tab.
- 4. Select the steps to comment on.

Bury Books Member	
DESCRIPTION TAGGED VALUES FLOW OF EVENTS	
Flow of events: Scenario +	B -
〕 ⊜ 1. loop	
1.1. Search book.	
1.2. Open a book page.	
1.3. Click Add to Cart.	
until all books are added.	
2. Click Checkout.	
 3. Enter delivery address. 	
 4. Confirm payment details. 	
5. Settle payment.	

Selecting some steps in Flow of Events

- 5. Click **New Topic** on the right hand side.
- 6. Enter the subject and post content.
- 7. Click Post. Members who followed the diagram will receive Email notification about your post.

Posting to working procedure of BPMN task/sub-process

You can also post comments to working procedure of BPMN task/sub-process.

- 1. Click on the desired BPMN task/sub-process in a business process diagram.
- 2. At the top right of the page, click **DETAILS**.
- 3. Open the **PROCEDURES** tab.
- 4. Select the steps to comment on.

= D Process Registration + Crede Member Record Card	Create Member Record	ft
DESCRIPTION PROCEDURES Procedure: Procedure = 1. Sign off the registration form		
2. Make a photocopy for the registration form 3. Place it into a folder 4. Put the folder into the cabinet		

Selecting a step in procedures

- 5. Click **New Topic** on the right hand side.
- 6. Enter the subject and post content.
- 7. Click Post. Members who followed the diagram will receive Email notification about your post.

Replying a post

To reply a post:

1. Click to open the desired post on the right hand side of PostMania.



Opening a post

2. Enter the content of reply.

Invalid use case	か 合
This is outside the system scope. remove.	Please
	🕒 now
Are you sure?	
👤 John	🕒 now
\sim	
Yes	
Post	Cancel
Entering reply conte	ent



Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Searching a Post

When you want to read the conversation made earlier but have no idea in which diagram and shape the conversation was made, you can search it out with a keyword.

Searching a post

1. At the top left of the PostMania notification page, enter the keyword in the Search... field.



word 'quotation'

2. Press the **Enter** key to perform a search. Search results are listed in the page.

📄 PostMania	Search Results
Victor -	Place Order Please ensure that the order is somehow connected with the quotation. We need to trace it in future.
Back Q quotation	Enter Negotiation - Prepare quotation We shall prepare a guaration before we enter a negotistion.
quotation now	Is it a bit too early to produce a quotation at that moment? The customer 5 mins

Search results

3. You can click on an entry to open it.

Search Results
Place Order Please ensure that the order is somehow connected with the quotation. We need to trace it in future.
Enter Negotiation - Prepare quotation We shall prepare a quotation before we enter a negotiation.
Is it a bit too early to produce a quotation at that moment? The customer 5 mins

Opening a post from search resutls

Accessing search history

The history of your previous searches are listed on the left hand side of the search page. You can search a keyword again by clicking on it.

📔 PostMania		
Victor -		
Back	Q auditing	
invoice		17 mins
auditing	վիդ	now
quotation	40	37 mins

Search the word 'invoice' again

Related Resources

The following resources may help you learn more about the topic discussed in this page.

<u>Visual Paradigm on YouTube</u>

Contact us if you need any help or have any suggestion

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Introducing Tasifier

What is Tasifier?

Tasifier is a task management tool designed for software development teams to manage software development activities. Read this page to learn more about Tasifier.

Interface overview

Tasifier is divided into three panes - Left Pane, Main Pane and Task Pane. This page details the purposes of these three panes.

Terminologies

You will encounter the terms listed in this page when you use Tasifier, or when you read the related user's guide pages of Tasifier. Let's check.

What is Tasifier?

Tasifier is a task management tool designed for software development teams to manage software development activities. Like PostMania, Tasifier is also a tool of <u>VPository</u> and <u>Visual Paradigm Teamwork Server</u>. Tasifier provides a place for team members of VPository and Visual Paradigm Teamwork Server to plan, store, manage and keep track of development activities. Tasifier is regarded as a task management solution "developed for software development team", mainly because its capability to run inside <u>Visual Paradigm</u>, a software design and development product of Visual Paradigm. When Tasifier is run inside Visual Paradigm, team members can perform design and task management within a unified environment - the modeling environment.

The task management software features the following:

- Task planning and assignment
- Task grouping (through Task Pool)
- Task categorizing (through tags)
- Task prioritizing
- Task monitoring
- Comment tracking

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Interface overview

Tasifier is divided into three panes - Left Pane, Main Pane and Task Pane. While the Left Pane and Main Pane appear all the time, the Task Pane is visible only when viewing the details of a task.



The three panes in Tasifier

No.	Name	Description
1	Left Pane	Provides different ways to browse tasks in Tasifier.
2	Main Pane	List tasks base on the selection on Left Pane.
3	Task Pane	Task details and comments.
Description of the three Tasifier panes		

Left Pane

The Left Pane provides you with different ways to browse tasks and access to some key features. You can browse tasks assigned to you (i.e. My Tasks), check inbox, browse overdue tasks, tagged tasks, tasks in a task pool and tasks assigned to a specific member.



The Left Pane

No.	Name	Description	
1	Profile Photo	Your profile photo and name. You can edit your profile by clicking on it, or by clicking on the arrow button next to your name and selecting Edit Profile from the popup menu.	
2	My Tasks	Click on it to list out the tasks that are assigned to you.	
3	Inbox Click on it to check the new or old messages Tasifier has sent you.		
4	Overdue Click on it to list out the tasks that are overdue, due tomorrow, due this week or due next week.		
5	Tags	You can create a tag by clicking on the add button, or to list tasks by tag by clicking on TAGS and then selecting a tag to list task.	
6	Active Project	The name of the active project is shown here. You can switch to another project by clicking on the project name and selecting the project. The list of task pools and members will be updated based on your selection.	
7	Task Pools	A Task Pool is a logical collection of tasks. The Task Pools available in the active project are listed here. You can click on a Task Pool to list out the tasks in the Main Pane.	
8	Members	The profile photo of members who are added into the project are listed here. You can click on a profile photo to see the tasks that are assigned to that member.	

Description of Left Pane

Main Pane

By selecting in Left Pane a way to browse tasks, you will see the relevant tasks listed in the Main Pane, with one row per task.

Depending on your selection made in the Left Pane, you may be allowed to create new task, sort task and filter task by clicking on the related button on top of the task list.

Task Pane

Task Pane appears only when a task is selected in Main Pane. You can see all the details of a task in the Task Pane, including the task description, attachments, sub-tasks, comments, followers, etc. Task Pane is also the place where you can add comments to and follow a task.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Terminologies

You will encounter the following terms when you use Tasifier, or when you read the related user's guide pages.

- Attachment
 - File that you can include as part of your task, or comment. It can be a Word document, a PDF file, an image, a video, or virtually any other type of file. An attachment can be a piece of work expected to be delivered (e.g. an image of screen design), or for detailing a task when text content is not enough.
- Comment
 - Message that can be posted to a task in response to the task submitter's initial message, or as a reply to comment(s) posted by other members.
- Due date
 - The date by which member should complete a task. For example, setting 15, August to be the due date of a task means that the task is expected to be completed on or before 15, August 23:59:59.
- Follow
 - The action to make a member become a follower of a task. Follower will receive notifications when the task is updated. Notifications are sent as inbox messages.
- Member
 - A person who can access Tasifier for its task management features.
- Overdue
 - A status of task that means that the due date of the task has elapsed and the task hasn't been completed by that moment.
- Profile
 - A set of member settings such as his/her photo, display name and password.
- Project
 - A primary unit of work that you can break down into tasks. A project is goal oriented so it may be the system to be built (e.g. Library management system), a feature (e.g. Mobile-phone based book searching) or a group of related resources (e.g. User Manual).
- Subtask
 - A unit of work that is a breakdown of a bigger piece of work.
- Tag
 - A label that helps you identify tasks. Tags are used to categorize tasks so you can find them effectively via searching.
- Task
 - A unit of work that is managed by Tasifier.
- Task Pool
 - A collection of similar or inter-related tasks.

Related Resources

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Account and Profile

Setting up member account

Members are people who can access Tasifier for task management. In this page, you will learn how to invite team members to VPository, and how to add members in Visual Paradigm Teamwork Server.

Editing profile

Team members figure out each other by reading their names and seeing their photos in task details, comments added to tasks and in Members list. This page shows you how to edit your profile in Tasifier.

Setting up member account

Members are people who can access Tasifier for task management. As Tasifier is a part of <u>VPository</u> and <u>Visual Paradigm Teamwork Server</u>, what you have to do to create a member is to invite or add him/her through VPository/Teamwork Server. Then, grant project access right to the member, to allow him or her to use Tasifier for that project.

For VPository users

- 1. Open a web browser
- 2. Visit and login your cloud entry point.
- 3. Click on your logo at the top right of the page and then select Manage VPository from the drop down menu.
- 4. Select **Members** from the menu on the left hand side.

5. Under the Members tab, click on Invite Member.

Hello World Company	
Management	Members Management
Projects	Members Groups Viewers
1 Members	
Administration	Invite Member
▲ Tools	Members
Configuration	Derek
System Tools	

Invite member

6. In the Invite Teammate screen, enter the name(s) and email address(es) of your teammates and click Send Invitation. Your teammates will receive an invitation email that invites them to join VPository. If they accept the invitation (by clicking the confirmation link in the email), they will become the members of VPository.

Invite Teammate		×						
You can invite your teammate(s) to work on this project by providing his/her name and email address. VPository will send invitation email to your teammate(s).								
	and start working on your project within 10 minutes. Afte our invitation, you will receive a notification email.)r						
Name:	Email:							
Andrew	andrew@demo-vp.com	X						
Holly	holly@demo- <u>yp</u> .com	+						
	Send Invitation Cance	el						

Invite teammate

- 7. After that, you can edit the members in VPository to grant them access right to projects. Assuming that your teammates have accepted the invitation, refresh the **Members** page of VPository to have them listed.
- 8. Move your mouse pointer over the row of member to edit and then click Edit.

Members	Groups Vie	wers			
Invite Me	mber			Show active	ve members only
ПМ	lembers		Projects	Last Login	Status
	ndrew	[Edit]	0	-	Active
D	erek	\bigcirc	1	Dec 06, 2016	Active

- Edit a member
- 9. You may now edit the name, email and password of the member.

- 10. Switch to the **Permissions** tab. You may adjust the various permissions granted to this member. This includes the administrator rights for creating/updating/deleting member and/or project, and the right to perform certain action in Visual Paradigm/ArchiMetric. The following table lists permissions you can set. Click here if you want to know more about the details of each permission setting.
- 11. Open the Projects tab. Click Add Project and press + on the project(s) that the member will involve. Click Close.
- 12. Decide whether he can read and/or commit changes made in the project. Read access enables opening the project from server and reading its content. Commit enables uploading project changes from client to server. This step is optional and you can assign member to project in project management page later on.
- 13. Click Save. The member can now manage tasks for the projects selected in step 11, provided that the projects have Tasifier enabled.

For Visual Paradigm Teamwork Server users

- 1. Open a web browser.
- 2. Visit and login VP Server.

Login to VP Server						
Hello World Company						
Email (Login ID)						
Password						
Stay Signed In						
LOGIN						
How to set up Visual Paradigm						

Logging into VP Server as administrator

- 3. At the top right, click on your profile logo image and select Admin Repository from the drop down menu.
- 4. Select **Members** from the menu on the left hand side.
- 5. Under the **Members** tab, click on **New Member**.
- 6. Enter the name, email address and password of the member to add.

Member	Permis	sions	Projects	
Name: *		Peter		
Email (Logi	n ID): *	peter@j	y.demo-vp.com	
Password:		•••••		
Confirm Pa	ssword:			
Active				

Entering member details

Option	Description
Name	Name of member. It is used for display purpose within the administration tool.
Email (Login ID)	Email address of member. It is also the login ID member use to log into the server at client side.

Password	The password member need to log into his/her account.					
Confirm Password	Re-enter the password for confirmation.					
Active	Set if you want to reject the member from logging into the server. Very often you set it when the member is no longer with your team and is not expected to modify the project anymore.					

Options available when adding member

- 7. Switch to the **Permissions** tab. Grant him/her the administrator rights for creating/updating/deleting member and/or project. If you want to limit the member to perform certain action in Visual Paradigm/ArchiMetric, update the settings under the **Access of features**, **Project configuration** and **Tag/Branch** sections. Click here if you want to know more about the details of each permission setting.
- 8. Click **Save** at the top right of page if you've modified the permission settings.
- 9. Open the Projects tab. Click Add Project and press + on the project(s) that the member will involve. Click Close.
- 10. Decide whether he can read and/or commit changes made in the project. Read access enables opening the project from server and reading its content. Commit enables uploading project changes from client to server. This step is optional and you can assign member to project in project management page later on.
- 11. Click Save. The member can now manage tasks for the projects selected in step 9, provided that the projects have Tasifier enabled.

Related Resources

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Editing profile

Your member profile consists of your login Email, password, display name and photo, if any. Team members figure out each other by reading their names and seeing their photos in task details, comments added to tasks and in Members list, so be sure to provide a correct name and upload an appropriate profile photo.

Editing basic member details

1. At the top of the left pane, you can see your profile photo, near your name. Click on it. If you haven't specified any profile photo, you will see a box in black, with the first letter of your name shown.



Click on profile image to edit profile

2. In the **Profile Setting** screen, you can edit your display name, upload a profile photo by clicking **Edit Profile Photo** and change your password by clicking **Change Password**. Note that your profile is shared with other features of <u>VPository</u> or <u>Teamwork Server</u>. This means that if you change the password here, you will need to use the new password for team collaboration, using PostMania, etc.

Profile S	etting	
F	jennifer@jy.demo-vp.com Jennifer Change Profile Photo Change Password ✓ Enable email notification ✓ Show RACI columns	
	Update Profile	Cancel

Profile Setting

3. Click **Update Profile** to save the changes.

Enabling email notification

As a team member, you might want to or need to be informed about the activities that happen under certain tasks. In Tasifier there is an Inbox to serve this purpose. And if you want to be informed via email, you can enable the **Enable email notification** option in the **Profile Setting** screen. By enabling the option, Tasifier will send you notification email for activities (e.g. posting reply, modified task description, etc) that happen on tasks you submitted, followed or tasks assigned to you.



To enable email notification

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Project

What is a project?

In Tasifier, a project is a primary unit of work that you can break down into tasks. In this page you will learn more about projects in Tasifier.

Creating project

In this page, you will learn how to create project in VPository and Visual Paradigm Teamwork Server, with the Tasifier option enabled.

Enabling Tasifier for existing project

If you want to manage the development activities for a project previously created in VPository or Visual Paradigm Teamwork Server, enable Tasifier for that project. This page shows you how to do this.

What is a project?

In Tasifier, a project is a primary unit of work that you can break down into tasks. A project is goal oriented so it may be the system to be built (e.g. Library management system), a feature (e.g. Mobile-phone based book searching) or a group of related resources (e.g. User Manual).

Since Tasifier is a part of VPository and Visual Paradigm Teamwork Server, project in Tasifier is shared with other features of <u>VPository</u> and <u>Visual</u> <u>Paradigm Teamwork Server</u>, such as collaborative modeling and PostMania. In other words, a project in VPository and Visual Paradigm Teamwork Server may contain the following data:

- Diagrams and model elements
- Revision histories
- Comments added via PostMania
- Tasks created via Tasifier

Related Resources

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Creating project

In this page, you will learn how to create project in VPository and Visual Paradigm Teamwork Server, with the Tasifier option enabled.

- 1. Open a web browser.
- 2. Visit your VPository cloud entry/Teamwork Server administration page.
- 3. Login VPository/Teamwork Server. Make sure you have project create and update rights.
- 4. Select **Projects** from the menu on the left hand side.
- 5. Click on **New Project** and select the location, which is a folder that can be created in the previous screen, by clicking **New Folder**.
- 6. Press on + next to the members or member groups to assign them to the project. Note that there must be at least one member be assigned to the project in order to add the project.

New Project	
Sample Project	
Location:	
Root	*
Advanced Options Members:	
David david@demo-vp.com	
Derek derek@demo-vp.com	
Gecko gecko@demo-vp.com	
Holly holly@demo-vp.com	-
Joey Joey@demo-vp.com	
Joy joy@demo-vp.com	
	Added Members: 4 Available Members: 5
	Create Project Cancel

Creating a project

7. Click on Create Project.

8. By default, the members who have been assigned to a project will have both the read and commit permissions on the project. If you want to change their permissions, move your mouse pointer over the row of project and then click **Edit**.



9. Open the Members tab. From there you can change the permissions of members. The Read permission means that member can only open the project in Visual Paradigm and read its content. The Read & Commit permission means that member can both open project and commit changes to server. These two permissions only affect collaboration features like open project in Visual Paradigm and commit project. They have NO effect on task management with Tasifier. In other words, all members, regardless of their Read and/or Commit rights, share the same level of permissions when using Tasifier.

P	roject	Members	Revisions	PostMania	Branches		
	Add N	Member Bulk A	Actions 👻				
		Members					General Permissions
		Andrew		[A	Advanced Permiss	ions] [Remove]	Read and Commit
		David					Read Only Read and Commit
		Derek					Read and Commit -
		Joy					Read and Commit -

Configuring members' permissions on this project

10. Open the **Project** tab.

11. Make sure **Enable Tasifier** is checked. If not, check it.

Project	Members	Rev	isions	PostMania	Branches		
Project Na	me: *		Sample F	Project			[Delete Project]
Rel tive P	roject Directory	.*	Sample	Project			
Enable	Tasifier	[?]	http://127	.0.0.1:1999/tasifier	jsp#proj=55		
Enable	UeXceler	[?]	http://127	.0.0.1:1999/uexcel	er.jsp#proj=55		
Enable	Postmania	[?]	http://127	.0.0.1:1999/postma	ania.jsp#proj=55		
The web bas 9.5+	sed services requ	iire any	of the follo	wing browsers: IE9	+, Firefox 4.0+, S	afari 5.0+, Chrome 5.0+ and C	Dpera
				Tasifie	er enabled		

12. Click Save at top right to save the changes. Team members can start using Tasifier by visiting the URL on the right.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Enabling Tasifier for existing project

If you want to manage the development activities for a project previously created in <u>VPository</u> or <u>Visual Paradigm Teamwork Server</u>, enable Tasifier for that project.

- 1. Open a web browser.
- 2. Visit your VPository cloud entry/Teamwork Server administration page.
- 3. Login VPository/Teamwork Server. Make sure you have project update right.
- 4. Select **Projects** from the menu on the left hand side.
- 5. Move your mouse pointer over the row of the project that you want to enable Tasifier, and then click Edit.



Edit project

6. Check Enable Tasifier under the Project tab.

Project Members	Re	visions	PostMania	Branches		
Project Name: *		Airfare				[Delete Project]
Relative Project Directo	ry: *	Airfare				
Enable Tasifier	[?]	http://127	7.0.0.1:1999/tasifier	jsp#proj=3		
Enable UeXceler	[?]	http://123	7.0.0.1:1999/uexcel	er.jsp#proj=3		
Enable Postmania	[?]	http://123	7.0.0.1:1999/postma	ania.jsp#proj=3		
The web based services re 9.5+	quire an	y of the follo	wing browsers: IES)+, Firefox 4.0+, S	afari 5.0+, Chrome 5.0+ a	ind Opera

Tasifier enabled

7. Click **Save**. Team members can start using Tasifier by visiting the URL on the right.

Related Resources

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Task Pool

What is a Task Pool?

A Task Pool is simply a 'pool of tasks'. It stores a collection of similar or inter-related tasks. In this page, you will learn what a Task Pool is.

Creating and editing Task Pool

Task Pool can be created from the left pane of Tasifier. In this page, you will learn how to create and edit a Task Pool in Tasifier.

Closing Task Pool

When all the tasks in a Task Pool are completed and closed, and if there won't be any new tasks, you can close the Task Pool. This page details the steps needed to close a Task Pool.

Viewing tasks in Task Pool

You can list out the tasks stored in a Task Pool by selecting the Task Pool frmo the Left Pane. This page details the steps you need to view tasks in a Task Pool.

Abnormal Task Pool

Knowing that a Task Pool is a 'pool of tasks', a Task Pool without any task is not reasonable. Tasifier treats this as an abnormal case and indicate it as a warning next to name of the Task Pool.

Creating and configuring Task Pools' Statuses

Aside from the three default statuses of Task Pool, you can define your own statuses. In this article you will learn how to do this.

What is a Task Pool?

A Task Pool is simply a 'pool of tasks'. It stores a collection of similar or inter-related tasks. Here are some sample uses of Task Pool:

- Create a Task Pool "Meeting 2014-05-01" to store all the tasks related to the meeting, such as to book meeting room, contact attendances, prepare agenda, etc.
- Create a Task Pool "Version 3.0" to store all the development activities related to version 3.0 of your product.
- Create a Task Pool "Screen Designs" to store all the tasks about creating wireframes or any kind of screen mock-up related to your system.
- Create a Task Pool "Analysis and Design" to store all the tasks that are created within the Analysis and Design phase.

One Task Pool can store unlimited number of tasks, while one task can only be stored in one Task Pool.

As a good practice, we recommend our users create Task Pool to manage their tasks, although it is allowed to create tasks without being contained by any Task Pool.

Project and Task Pool

You can have multiple projects and each project can have multiple Task Pools. Task Pool is project-wide. If you want to have the "same" Task Pool available in different projects, please create them individually. "Same" here means the same name. Task Pools cannot be shared among projects.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Creating and editing Task Pool

6

Task Pool can be created from the left pane of Tasifier. To create a Task Pool:

1. Click on the add button next to the **Task Pools** caption.

John -
📕 My Tasks
🗟 Inbox
🤕 Overdue 🗸
🖏 Tags 🛨
Critical
Important
Not Important
👚 Library Manageme 👻
Task Pools
Members
Create a Task Pool

2. Enter the name of the Task Pool in the Main Pane and press Enter to confirm.



Name the Task Pool

Describe the Task Pool

You can describe the goal of the Task Pool by adding a description. To add a description:

- 1. Click on the down arrow next to the name of the Task Pool, from the Main Pane.
- 2. Select Add Description from the drop-down menu.

« User Ma			
+ New Task	Rename	Filter - Change - Q Search	
	Add Description الم		
This Task Poc	Settings	en planning, assignee would not be notified until the Task Pool	
is started. To start the ta	Delete	EKick off] button near the Task Pool name.	

Add a description to Task Pool

3. Enter the description. You can add a new line by pressing **Enter**. To confirm editing, press **Ctrl-Enter**, or click on the region outside the description field.

« User Manual - Kick off

-	Write user's guide for the features of the Library Management System.	Search
T	started	be notified until the Task Pool
	o start the task pool, please click the [Kick off] button near the Task	Pool name.

Edit Task Pool description

To edit the description of a Task Pool:

- 1. Open the Task Pool from the Left Pane.
- 2. Click on the down arrow next to the name of the Task Pool.
- 3. Select Edit Description from the drop-down menu.
 - « User Manual 🗢

+ New Task	Rename Edit Description	Filter Change Q Search	
8 active ta			0 closed
1 🔡 Writ	e Close	eck-in" feature	2015-08-17
2 💐 Write	e user manual for "Book	Check-out" feature	2015-08-17
3 📉 Write	Write user manual for "Book Searching" feature		2015-08-17

Edit Task Pool description

- 4. Modify the description.
- 5. Press Ctrl-Enter to confirm editing.

Set a default due date for new tasks in a Task Pool

You can set a default due date for tasks to be created in a Task Pool.

To set a default due date for new tasks in a Task Pool:

- 1. Open the Task Pool from the Left Pane.
- 2. Click on the down arrow next to the name of the Task Pool.
- 3. Select **Settings** from the drop-down menu.
 - « User Manual 🗢

+ New Task	Rename	Filter - Change -	Q Search	
O cotivo to	Edit Description			0
9 active ta	Settings			0 closed
1 💐 Write	Close	eck-in" feature	:	2016-04-04
2 💐 Write	user manual for "Book (Check-out" feature	:	2016-04-04

Edit Task Pool settings

4. Choose an option:

Unspecified - Not to apply a default due date.

Duration - If you want to give team members a specific number of days to finish a task in this Task Pool, choose this option and enter the number of days in the text box. The due date of new tasks will be calculated based on their create date and the number of days specified here. **Date** - A specific date.

Task Pool Settings
Task default due date:
Unspecified
Duration 10 + -
O Date
Update Cancel

The various default due date options

5. Click **Update** to confirm the setting.

Kick-off the Task Pool

When you create a Task Pool, the Task Pool is in the **Planning** state. Assignees will not see the task in their **My Tasks** page, nor receive any notification about the new tasks, until the Task Pool is "kicked off".
When you have finished planning tasks, click the **Kick off** button next to the name of the Task Pool. Once you have done that, assignee will see the tasks appear on their **My Tasks** page. They can then begin working on the tasks.

Nev	v Task Sort by Priority • Filter • Change • Q Sea	arch
star	ask Pool is being planned. When planning, assignee would not be ted. In the task pool, please click the [Kick off] button near the Task Poo	
8 pla	anned tasks	0 closed
1	Write user manual for :Book Check-in" feature	2015-08-1
2	Write user manual for "Book Check-out" feature	2015-08-1
3	Write user manual for "Book Searching" feature	2015-08-1
4	Write user manual for "Installation"	2015-08-1
5	Write user manual for "Reporting" feature	2015-08-1
6	Write user manual for "Patron management"	2015-08-1
7	Write "Setup Guide"	2015-08-1
1	Write "Quick Start Guide"	2015-08-1

Kick-off Task Pool

Task Pool is changed to **Working** state once kicked off. You can find the Task Pool from the Left Pane by selecting **Working**, next to the **Tasks Pools** caption.



"Working" Task Pools listed under Left Pane

NOTE: Once a Task Pool has been kicked off, it cannot be changed back to the Planning state. Yet, you can always add new tasks to a Task Pool kicked off.

Quick way to opening a Task Pool

If your project has many Task Pool, here is a quick way to open the Task Pool you want. Press the hot-key **Shift-T**. Then, choose the project from the popup list, and then the **Task Pool** to open.

Related Resources

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Closing Task Pool

When all the tasks in a Task Pool are completed and closed, and if there won't be any new tasks, you can close the Task Pool. Note that you can only close a Task Pool when there is no task in it. Closed Task Pool cannot be re-opened. If you really want to re-open a closed Task Pool, the only thing you can do is to create a new Task Pool with same name.

To close a Task Pool:

1. Select the Task Pool to close, from the Left Pane. Note that you need to open the right project in order to find your Task Pool. Besides, make sure you are viewing Task Pools in **Working** state.



- 2. On the Main Pane, click on the down arrow button next to the name of the Task Pool.
- 3. Select **Close** from the drop down menu.

« Protot	ypes 🖸			
+ New Task	Rename Add Description	Filter - Change -	Q Search	
0 active	Settings			0 closed
	Close			



4. Select **Yes** when you are prompted for confirmation. Task Pool is then changed to **Closed** state. You can find the Task Pool from the Left Pane by selecting **Closed**, next to the **Task Pools** caption. You can also view the details of tasks (but not to edit them).

Task Pools +	Closed •
Prototypes	
Members	
Powered by Visual Para	digm
Closed Task Po	ol

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Viewing tasks in Task Pool

You can list out the tasks stored in a Task Pool by selecting the Task Pool from the Left Pane. Tasks are listed row by row. The final row is empty, and allows you to create new task in the Task Pool.

Tasifier -	« User Manual -	
John -	+ New Task Sort by Priority - Filter - Change - Q Search	
	8 active tasks	0 closed
My Tasks 2	1 Write user manual for :Book Check-in" feature	2015-08-17
🗟 Inbox	2 Write user manual for "Book Check-out" feature	2015-08-17
🗑 Overdue 📼	3 🌇 Write user manual for "Book Searching" feature	2015-08-17
🖏 Tags 🕂	4 👫 Write user manual for "Installation"	2015-08-17
V Tays T	5 📰 Write user manual for "Reporting" feature	2015-08-17
👚 Library Manageme 👻	6 🞆 Write user manual for "Patron management"	2015-08-17
Task Pools + • Working -	7 🔛 Write "Setup Guide"	2015-08-17
Book Check-in	8 Write "Quick Start Guide"	2015-08-17
Book Check-out		
Testing		
User Manual		
Members		
Powered by Visual Paradigm		
	Viewing tasks in Task Pool	

Sort tasks by priority

This is the default way of how tasks are sorted. When tasks are sorted by priority, they are listed by following the order they were created in the Task Pool, or later reordered by team members.

The numbers in front of a task (row) indicate its order. Next to it your have a thumbnail of the assignee, and the subject of task.

« User Manual -

+ New Task Sort by Priority • Filter • Change • Q Search	
8 active tasks	0 closed
1 Write user manual for :Book Check-in" feature	2015-08-23
2 Write user manual for "Book Check-out" feature	2015-08-28
3 Write user manual for "Book Searching" feature	2015-08-31
4 Write user manual for "Installation"	2015-08-20
5 Write user manual for "Reporting" feature	2015-08-17
6 Mite user manual for "Patron management"	2015-08-29
7 💐 Write "Setup Guide"	2015-08-17
8 Write "Quick Start Guide"	2015-08-17

Sort tasks by priority

Sort tasks by assignee

By sorting tasks by assignee, tasks are sorted and grouped by the name of the team members to whom they are assigned. Tasks that have no assignee, if any, are grouped and put at the final group, named Non assigned.

« User Manual -



Sort tasks by assignee

Sort tasks by due date

Tasks with due date set are put at a grouped named **Active**, and are sorted base by their due dates. Tasks without due date set are put in a group named **No due date**.

« User Manual -

+ New Ta	ask Sort by Due Date • Filter • Change • Q Search	
Active		
1	Write user manual for "Reporting" feature	2015-08-17
2 ≚	Write "Setup Guide"	2015-08-17
3 🚮	Write "Quick Start Guide"	2015-08-17
4 ≚	Write user manual for "Installation"	2015-08-20
5	Write user manual for :Book Check-in" feature	2015-08-23
6	Write user manual for "Book Check-out" feature	2015-08-28
7	Write user manual for "Patron management"	2015-08-29
8	Write user manual for "Book Searching" feature	2015-08-31

Sort tasks by due date

Filter

If you want to list *only* tasks that are in a specific tag, use Filter. By clicking on the Filter menu, you will see a list of defined tags. By choosing a tag, the task lists in the Main Pane will be updated to list only tasks that are in the tag selected.

To remove a filter, click on the Filter menu again and select Show All from the drop down menu.

Search

Search enables you to quickly locate a task, or a set of tasks by entering part of the tasks' names. For example, you can enter "login" to find out all the tasks that contains the word "login" in their subjects, such as "develop the login function", "prepare login screen design", "write login guides", etc.

By clicking on the **Search** field, you can start typing the keyword of task. Press **Enter** to start searching. The task lists in the Main Pane will be updated to list only tasks that have their subjects containing the keyword you entered.

« Searching "User Manual"

Sort by	Last Modified 👻	Q manual		
In proje In Task Closed				
more crit				Clear Search
6 sea	arch results			
6 sea	arch results Write user manual for "Patron management"		2015-08-29	User Manua
6 sea			2015-08-29 2015-08-20	
1	Write user manual for "Patron management"		2010 00 20	User Manua User Manua User Manua
1 🔝 2 🔛	Write user manual for "Patron management" Write user manual for "Installation"		2015-08-20	User Manua
1 1 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Write user manual for "Patron management" Write user manual for "Installation" Write user manual for "Book Searching" feature		2015-08-20 2015-08-31	User Manua User Manua

Search in Task Pool

Related Resources

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Abnormal Task Pool

Knowing that a Task Pool is a 'pool of tasks', a Task Pool without any task is not reasonable. Tasifier treats this as an abnormal case and indicate it as a warning next to name of the Task Pool, like this:

Task Pools +	Planning 🔻
Logging	
Members	

Abnormal Task Pool

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Creating and configuring Task Pools' Statuses

A Task Pool can be in one of the three statuses by default, namely Planning, Working and Closed. These statuses not only indicate the current state of the Task Pools and the tasks within, but also add different effects to them. The following table lists the three statuses and their effects:

Status	Description	Effe
Planning	Task Pool is not yet started. Yet, team members can start planning the tasks to be accomplished under this Task Pool.	т
		a
		ta
		v
		n
		S
		t
		t: ii
		t
		t
		I
		ι
		t
		T
		ł
		á
		ł
orking	Team members are working on the tasks in the Task Pools actively.	
osed	All tasks are cleared and no more new tasks will be created. The task pool has finished its mission and hence closed.	
0000		t
		-
		I
		ä
		t
		1
		ć
		r
		(
		1
		t
		(
		ä
		ć
		1
		t
		1
		-
		l
		I
		1
		(
		t
		ć
		(
		t
		t

Aside from the three statuses, you can define your own statuses. In this article you will learn how to do this.

Enabling the configuration permission of Task Pool statuses

The configuration of Task Pool is not everyone's permission. One must be granted such a permission in order to configure Task Pool statuses. To grant such a permission to a member:

- 1. Open a web browser.
- 2. If your team uses VPository, visit and login your cloud entry point. If your team uses Teamwork Server, visit the VP Server URL and login as administrator. Note that the login ID of the default server administrator is *Admin*.
- 3. If your team uses VPository, open the Members page. If your team uses Teamwork Server, click on Members for Teamwork Module.

4. On the member list, select the member to grant him/her the configuration permission.



Selecting a member

5. On the right hand side, under the Edit Member page, check Task pool status.



Grant a member the permission to configure Task Pool statuses

6. Click Save.

Configuring Task Pool statuses

Team members who are granted the permission to configure statuses (read the section above for steps) can create and edit the statuses in Tasifier. To configure status:

1. In Tasifier, move your mouse pointer over the Task Pools caption.

2. You should see the gear button. Click on it. If you do not see such a button, make sure you are granted the configuration permission.

Tasifier
Derek 👻
📕 My Tasks
🖄 Inbox
💿 Overdue 🗸
🆏 Tags 🕂
👚 FireSafetyDepartm 👻
Task Pools + 🌣 Planning 🔻
Members
To configure Task Pool statuses

3. You are presented the **Task Pool Status Setting** window. You can now define a new status by clicking **New Status**, entering its name and setting its entry condition and attributes. Entry condition is the condition required to fulfill in order for a Task Pool to enter this status. Attributes are the effects of setting a Task Pool to be in this status. Please read the next section for details. Note that the order of statuses in the list is important because it determines the next status a Task Pool will be in by proceeding from the current one. You can change the order of statuses by dragging them.

Task Pool Status Setting	New Status
Planning	
Status	
jj Planning	
Working	
Closed	
Entry Condition	
All tasks are closed	
Attributes	
Kicked off	
Read only tasks	
Read only task list	
	Save Cancel

Task Pool Status Setting window

4. Click **Save**. Note that the configuration of statuses is shared among **all** projects.

Effect of attributes

Attribute	Description
Kicked off	Tasks will appear on assignee's task list.

Read only tasks	Tasks will not be non-editable, which means that members cannot edit the description, any properties and add comments to the tasks.
Read only task list	Not allowed to add new tasks nor to delete tasks.

Description of the effects of attributes

Proceeding to the next status

To move a Task Pool to the next status, proceed it. To proceed:

- 1. Click on the down arrow next to the name of the Task Pool, from the Main Pane.
- 2. Select Proceed to "Closed" status from the drop-down menu where " Closed" is the name of the next status.

« My Task Pool	(Working)	
+ New Task Sort by 0 active task	Proceed to "Closed" status Rename Add Description	ige 🔻
	Settings	

Proceed to next status

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Task

What is a task?

A task is a unit of work that is managed by Tasifier. You use Tasifier to plan tasks, manage tasks and keep track of the progress of tasks. This page shows you how to do.

Creating and editing task

You create a task when you want someone, including you, to do something. This pages details the steps you need to take to create and edit tasks in Tasifier.

Deleting task

If a task is created by mistake, or if you decide it's no longer needed, you can delete it. This page shows you how to delete task in Tasifier.

Searching task

When you want to locate a task with its subject, either part of or the entire subject, use the search function. This page details the steps you need to take to search and refine search result.

Following task

Follow is the action to make a member become a follower of a task. Follower will receive notifications when the task is updated. Notifications are sent as inbox messages. This page details the steps you need to take to follow and unfollow a task.

Adding comment

Comment is a message that can be posted to a task in response to the task submitter's initial message, or as a reply to comment(s) posted by other members. This page details the steps you need to take to post a comment.

Using attachment

Attachment is a file that you can include as part of your task, or comment. It can be a Word document, a PDF file, an image, a video, or virtually any other type of file. This page details the steps you need to take to attach file to a task in Tasifier.

Subtasks

A Subtask is a unit of work that is a breakdown of a bigger piece of work. You add subtask when you want to break a task into smaller parts to achieve better management and better use of resources. This page details the steps you need to take to view and add subtasks.

Viewing other member's tasks

You can review the workload of teammates by opening their My Tasks page and read the tasks listed there. This page details the steps to view other member's tasks.

What is a task?

A task is a unit of work that is managed by Tasifier.

You use Tasifier to plan tasks, manage tasks and keep track of the progress of tasks.

Team members can comment on task, assign a task to someone and to follow tasks to receive notifications.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Creating and editing task

You create a task when you want someone, including you, to do something. In Tasifier, you can create tasks in two places - in My Tasks pane or in Task Pool.

Creating task in My Tasks page

Usually, you create tasks in My Tasks page when you want to add a note to yourself, to remind yourself to do something.

Tasks created in My Tasks page do not belong to any Task Pool, although you can move them to a Task Pool later on.

To create task in My Tasks page:

1. Select My Tasks from the Left Pane.

John 👻	
🗏 My Tasks	
🗟 Inbox	
Toverdue	*
Open Mv Tasks	

2. There are three lists in the Main Pane. The **To do** list is for listing tasks that should be tackled within a short period of time. The **New** list is for listing tasks you recently received. The **Pending** list is for listing tasks that will be tackled later on. Choose the list that best suit the status of the task you want to create. Click inside the last and empty row under the list.

« My Tasks		
Sort by Priority Filter Change	Q Search	
To do		
Click here to add a task to Library Management System	I	

To create a task

3. Enter the subject of your task, which is a summary of the things you need to do, under this particular task. (You will fill in the task details later on)

To do		
	Upgrade the O/S to new version	I

Enter the subject of task

4. Press Enter to confirm. You are now on a new row and you can start entering the subject of another new task, if any. If you have finished entering all tasks, just leave the last row empty.

To do				
1	Upgrade the O/S to new version	2015-08-14		
	I			

Task created

5. Now, you can optionally enter the task description. If the subject is clear enough, this step can be skipped. If you want to enter the details of task, click on a task you created. This shows the Task Pane.

« My Tasks	📑 Me 🛛 To do	10 > 2015-08-14
Sort by Priority - Filter - Ch:	No task pool - Library Management System	• ∅ ا≣ :
To do Upgrade the O/S to new ver New Pending	Upgrade the O/S to new version Click here to edit Submitted by John. John assigned to John.	2015-07-31 14:39 2015-07-31 14:39
	Click here to write a comment	
	Follow +	Hide

Select a task to edit its task description

6. Click below the subject of task to enter the edit mode of task description.

Upgrade the O/S to n	ew version	
Click here to edit	2	

To enter task description

7. Enter the task details. You can add a new line by pressing **Enter**. To confirm editing, press **Ctrl-Enter**, or click on the region outside the description field.

Upgrade the O/S to new version - my desktop - my laptop

Task description entered

8. You may optionally change the **Due Date** at the top right corner in the Task Pane. Due date is the date by which you should complete the task. Click here to learn more about setting due date.



9. Next to **Due Date**, you may set a team member to verify your work. When you complete the task, that member will see the task listed in his/her My Tasks page, pending for his verification. If you do not specify a team member here, once you complete the task it will be closed immediately.

🚞 Me 🛛 To do	11 > 2015-08-17
No task pool - Library Managen	Verify by John
Upgrade the O/S to ne	
- my desktop - my laptop	Betty
Out with disc late	john .
Submitted by John.	Sman De
John assigned to John. John changed description.	Stephen T
John changed due date to 201	None

Select a team member to verify your work

Creating task in Task Pool

You create tasks in a Task Pool when the tasks are related to the goal of the Task Pool. For example, you create a task "Prepare screen design for registration page" under the task pool "Screen Design".

To create task in a Task Pool:

1. Select the Task Pool from the Left Pane. Note that you need to open the right project in order to find your Task Pool. Besides, make sure you are viewing Task Pools in either **Planning** or **Working** state. You cannot create task in closed Task Pools.

John 👻
My Tasks
🖄 Inbox
The overdue The ov
🆏 Tags 🕂
👚 Library Manageme 👻
Task Pools + • Working •
Reporting
<u>ကို User Manual</u>
Members
Select a Task Pool

2. Tasks of the Task Pool, if any, are listed in the Main Pane, row by row. Click on the last and empty row.

8	active tasks	0 closed
1	Write user manual for "Book Check-in" feature	2015-08-23
2	Write user manual for "Book Check-out" feature	2015-08-28
3	Write user manual for "Book Searching" feature	2015-08-31
4	Write user manual for "Installation"	2015-08-20
5	Write user manual for "reporting" feature	2015-08-14
6	Write user manual for "Patron management"	2015-08-29
7	Write "Setup Guide"	2015-08-14
8	Write "Quick Start Guide"	2015-08-14
	I	

To create a task

3. Enter the subject of your task, which is a summary of the things you need to do, under this particular task. (You will fill in the task details later on)

7	<u>×</u>	Write "Setup Guide"		2015-08-14
8	营	Write "Quick Start Guide"		2015-08-14
		Write user manual for "Shortcut keys"	I	

Enter the subject of task

4. Press Enter to confirm. You are now on a new row and you can start entering the subject of another new task, if any. If you have finished entering all tasks, just leave the last row empty.

9		Write user manual for "Shortcut keys"	2015-08-14
8	*	Write "Quick Start Guide"	2015-08-14
7	<u>*</u>	Write "Setup Guide"	2015-08-14

Task created

5. Now, you can optionally enter the task description. If the subject is clear enough, this step can be skipped. If you want to enter the details of task, click on a task you created. This shows the Task Pane.



Select a task to edit its task description

6. Click below the subject of task to enter the edit mode of task description.

Write user manual for	"Shortcut keys"
Click here to edit	5

To enter task description

7. Enter the task details. You can add a new line by pressing **Enter**. To confirm editing, press **Ctrl-Enter**, or click on the region outside the description field.

Write user manual for "Shortcut keys"				
 key binding table key stroke desc steps to configure 	\square			

Task description entered

8. Set the assignee at the top left of the Task Pane. Assignee is the team member who is responsible to perform the task. Click on the assignee icon and select the assignee from the drop down menu. You can enter his/her name to locate him/her in quick.



Select an assignee

9. Optionally change the **Due Date** at the top right corner in the Task Pane. Due date is the date by which you should complete the task. Although due date is optionally, setting a due date enables the assignee to manage their time more effectively by determining which task to do first, and which task to do next. Click here to learn more about setting due date.



Pick up a due date

10. Next to **Due Date**, you may set a team member to verify the work. Although in most cases, you, as the submitter of task, is the one who verify the completeness of the task, it's not always the case. If someone else is responsible to verify the task, set him/her to the person to verify this task. When the assignee has completed the task, the one who responsible to verify it will see the task listed in the My Tasks page, pending for verification. If you do not specify a team member here, once the task is completed it will be closed automatically.

Betty	11 > 2015-08-	17 🛛 😰
User Manual - Library Manager	Verify by John	
Write user manual for		
 key binding table key stroke 	Betty	
- desc	🛫 John	
- steps to configure	Ssman 🔤	
Submitted by John.	🛃 Stephen 🖑	
John changed description.	None	
John assigned to Betty.	()	
John changed due date to 2015	5-08-17. 2015-07	7-31 14:54

Select a team member to verify work

Quick task assignment

If you want to assign a task to another team member, choose any of the methods below.

Method 1 - Via the Task Pane

- 1. Open the details of the task in Task Pane. If the task is inside a Task Pool, open the Task Pool from the Left Pane and select the task from the tasks list. You can also find from tag, based on their due status, etc.
- 2. At the top of the Task Pane, click on the profile photo of the current assignee.

3. Select the new assignee.



Changing the assignee of a task

Method 2 - Via drag-and-drop

This method allows you to re-assign one or multiple tasks to another assignee. Select the task(s) to move in the Main Pane. You can press the **Shift** or **Ctrl** key to perform a multiple selection. Then, drag the selection to the profile photo of the desired member at the bottom of the Left Pane.



Re-assign a task to another member

Moving a task to another Task Pool

If you want to move a task from one Task Pool to another, choose any of the methods below.

Method 1 - Via the Task Pane

- 1. Open the details of the task in Task Pane. If the task is inside a Task Pool, open the Task Pool from the Left Pane and select the task from the tasks list. You can also find from tag, based on their due status, etc.
- 2. At the top of the Task Pane, click on the arrow that appear next to the name of the Task Pool.
- 3. Select the Task Pool to move the task to. If you want to move the task to a Task Pool in another project, choose Change project.

🔛 Me New		10 > 2015-08-14
Reporting - Library	Management System	• ⋒ ≔ :
Develop borr	-	
Click here to ed	it	No task pool
	Show a	Reporting
John assigned to		User Manual
John assigned to		Book Borrowing
Osman, you ca	n find the archive in t	Change project
Osman assigned	to John.	2015-07-31 14:57
Osman Where	is your finger drive?	2015-07-31 14:57

Moving a task to another Task Pool

Method 2 - Via drag-and-drop

This method allows you to move one or multiple tasks to another Task Pool. Select the task(s) to move in the Main Pane. You can press the **Shift** or **Ctrl** key to perform a multiple selection. Then, drag the selection to the desired Task Pool on the Left Pane.



Moving task to another Task Pool

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Duplicating task

You can use the duplicate feature to quickly create new task(s) from an existing one to save time in creating similar tasks again and again. This is particularly useful when you need to create tasks with similar nature, or simple let multiple people perform the same task which requires the creation of same time again and again.

Duplicate does not carry all properties. Here are the properties that will be duplicated:

- Task subject
- Task details
- Assignee
- Verify person

To duplicate a task:

1. Open the details of the task in Task Pane. If the task is inside a Task Pool, open the Task Pool from the Left Pane and select the task from the tasks list. If the task is one of a task assigned to you, find it in the My Tasks page. You can also find from tag, based on their due status, etc.

Tasifier -	« Reporting -	🔛 Me New	10 > 2015-08-14
John -	+ New Task Sort by Priority -	Reporting - Library Management System	�@ i≣ :
My Tasks 2	1 active task	Develop borrow log Click here to edit	
Inbox	E Develop borrow log	Show all logs	
🗑 Overdue 👻		John assigned to John.	2015-07-31 14:55
• Overage		John assigned to Osman.	2015-07-31 14:56
📎 Tags 🕇		Osman, you can find the archive in the drive.	finger2015-07-31 14:56
🚖 Library Manageme 👻		Osman assigned to John.	2015-07-31 14:57
Task Pools + Working Working		Osman Where is your finger drive?	2015-07-31 14:57
Reporting			
User Manual			
Members			
		Click here to write a comment	
Powered by Visual Paradigm		Follow +	Hide

Selected a task

- 2. On top of the task subject, click on the More button on the right hand side.
- 3. Select **Duplicate this Task** from the drop down menu.



Duplicating a task

Related Resources

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Deleting task

If a task is created by mistake, or if you decide it's no longer needed, you can delete it.

To delete a task:

1. Open the details of the task in Task Pane. If the task is inside a Task Pool, open the Task Pool from the Left Pane and select the task from the tasks list. If the task is one of a task assigned to you, find it in the My Tasks page. You can also find from tag, based on their due status, etc.



Selected a task

- 2. On top of the task subject, click on the More button on the right hand side.
- 3. Select Delete this Task from the drop down menu.



Deleting a task

4. Click Yes to confirm deletion. Note that deletion is irreversible. Think twice before you confirm deletion.

Delete task vs close task

Delete task is different from close task.

In terms of definition, delete task means to remove a task from Tasifier due to it is wrongly created and its existence may cause problem say, assignee may read the task and perform the task as requested, while the task is supposed to be invalid. Close task is the action to close a completed task. It is the very end of the lifecycle of a task - from created, to performed, to completed, to closed.

Deleted task will not exist in Tasifier anymore once it has been deleted. No way can retrieve it in any way. Closed task can, for sure, be retrieved in Task Pool, by searching, by visiting its URL, etc.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Searching task

When you want to locate a task with its subject, either part of or the entire subject, use the search function. The search function in Tasifier is context sensitive. You can search tasks from your own tasks listed in the My Tasks page, from tasks to be due, from tasks with specific tag(s) assigned, from a Task Pool, or from the entire project, depending on the way tasks are currently listed in the Main Pane. For example, you can search task from a Task Pool by first selecting the Task Pool from the Left Pane, then enter the word in the task's subject in the **Search** box, at the top right of the page, then press **Enter**.

Tasifier -	« User Manual -	•
John -	+ New Task Sort by Priority + Filter + Change - Q report I	
	9 active tasks	0 closed
📕 My Tasks 🔹 🔼 🚺	1 👫 Write user manual for "Book Check-in" feature	2015-08-23
🙈 Inbox	2 Write user manual for "Book Check-out" feature	2015-08-28
👿 Overdue 👻	3 🞆 Write user manual for "Book Searching" feature	2015-08-31
🖏 Tags +	4 Write user manual for "Installation"	2015-08-20
¢	5 Write user manual for "reporting" feature	2015-08-14
👚 Library Manageme 👻	6 📓 Write user manual for "Patron management"	2015-08-29
Task Pools + • Working *	7 🚟 Write "Setup Guide"	2015-08-14
Book Borrowing	8 🗱 Write "Quick Start Guide"	2015-08-14
Reporting	9 🌇 Write user manual for "Shortcut keys"	2015-08-17
User Manual		
Members		
Powered by Visual Paradigm		

Searching with keyword

Tasks that have their subject match with the text you entered are listed in the Main Pane. You can click on a task to read its details in Task Pane.

« Searching "User Manual"

Sort by Last Modified -	Q report	
In projects (Library Management System \checkmark) In Task Pool User Manual - Library Management System x Closed Task		
more criteria		Clear Search
1 search result		
1 Write user manual for "reporting" feature	2015-08-14	User Manual

Search result listed

As said above, other than searching Task Pool you can search from other pages. Here are the pages that support the search function:

- My Tasks (and the My Tasks page of other members)
- Overdue/Due Tomorrow/Due This Week/Due Next Week
- Tag
- Task Pool
- Project

If you are unclear about the location of a task, try to search from the project. By selecting the project from Left Pane, all the tasks in the project are listed in the Main Pane. Then, you can find your task by searching there.

Refining search result

If you failed to find the task you want by searching, you may want to refine the search result by adjusting the search criteria. At the top of the search result you can configure the search criteria. The layout of search criteria may look differently when searching from different pages, but you can always add and remove an item by moving your mouse cursor over the related criteria.

In projects

If you want to search tasks from more than one project, move your mouse pointer over the **In projects** section and click + at the end of the project list. Select the project(s) to be included in the popup menu, then click **Apply** to re-list the tasks base on the new search criteria. You may also remove project selection by unchecking it from the menu.

« Searching "User Manual"

Sort by Last Modified 👻	Q, report		
In projects Library Management System + In Task Pool User Manual - Library Management	•		
Closed Task 🕑	Library Management System		
Assigned to ▼ Tag ▼ Within Due Days	Utilities		Clear Search
1 search result	Apply		
1 Write user manual for "reporting" fea	ture	2015-08-14	User Manua

Search projects

In Task Pool

If you want to search tasks from more than one Task Pool, move your mouse pointer over the project where the Task Pool is stored. Click the down arrow button and select the Task Pool(s) to be included from the drop down menu, then click **Apply** to re-list the tasks base on the new search criteria. You may also remove Task Pool selection by unchecking it from the menu.

« Searching "User Manual"

Sort by Last Mod	lified -	Q, report	
In projects In Task Pool Closed Task	Library Management System ▼ x) Utilities ▼ x) Task Pools □ All Task Pools	+	
Assigned to 👻			Clear Search
1 search re	Book Borrowing		
1 Write t	User Manual User Manual Apply	2015-08-14	User Manual

Search Task Pools

Assigned to

If you want to search tasks that have been assigned to specific team member, or members, click on the down arrow button next to **Assigned to**. Then, select the team member(s) to be included from the drop down menu, then click **Apply** to re-list the tasks base on the new search criteria.

« Searching "User Manual"

Sort by Last Modified -	Q repo	rt	
In projects Library Manageme	ent System ▼ x		
In Task Pool User Manual - Lib	ary Management System x		
Closed Task 🕑			
Assigned to 😒 🛛 Tag 👻 🛛 Wi	thin Due Days 🔻		Clear Search
Betty	g" feature	2015-08-14	User Manua
John			
🗹 🗮 Osman			
Stephen			

If you want to search tasks that have been assigned with specific tag, or tags, click on the down arrow button next to **Tag**. Then, select the tag(s) to be included from the drop down menu, then click **Apply** to re-list the tasks base on the new search criteria.

« Searching "User Manual"

Sort by Last Modified 👻	Q, report	
In projects (Library Management System 🔻 x)		
In Task Pool User Manual - Library Management System x		
Closed Task 🖉		
Assigned to ▼ Tag S Within Due Days ▼		Clear Search
1 search res		
1 📰 Write us 🖌 From Client	2015-08-14	User Manu
Important		
Apply		

Select tags

Within Due Days

If you want to search tasks base on their due status, click on the down arrow button next to **Within Due Days**. Then, select the option that best matches your search need, and then click **Apply** to re-list the tasks base on the new search criteria.

Here are the available search options:

- Due within the next N days Tasks that will become overdue in the coming N days
- Due within the last N days Tasks that have been overdue in the previous N days. Completed tasks are also listed.
- Due within the period Date X to Date Y Tasks that have been or will become overdue within the selected range of days.

« Searching "User Manual"

Sort by Last Modified 👻	Q report		
	ment System ▼ x) Library Management System _x		
Assigned to 👻 Tag 👻 🕔	Within Due Days 🕤		Clear Search
1 search result	Due within the next 7 I working days		
1 📰 Write user manual	Oue within the last	15-08-14	User Manual
	Due within the period		
	Apply		

Search by due days

Closed Task

If you want to search tasks from BOTH opened and closed tasks, click Closed Task.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Following task

Follow is the action to make a member become a follower of a task. Follower will receive notifications when the task is updated. Notifications are sent as inbox messages.

To follow a task:

- 1. Open the details of the task in Task Pane. If the task is inside a Task Pool, open the Task Pool from the Left Pane and select the task from the tasks list. You can also find from tag, based on their due status, etc.
- 2. Click **Follow** at the bottom of the Task Pane.

« Reporting -	Ssman Osman	10 > 2015-08-14
+ New Task Sort by Priority -	Reporting - Library Management System	♥ @ i≣ :
7 active tasks 1 Develop search statistic report 2 Develop patron activity report 3 Develop book borrowing report 4 Develop patron registration statistic 5 Develop borrow log	Develop return log Click here to edit Submitted by John. John assigned to Osman.	2015-07-31 16:24 2015-07-31 16:25
Image: Second constraints Develop return log 7 Image: Second constraints Develop due log		
	Click here to unite a comment	Hide

Follow a task

The profile photo of followers are listed next to the Follow button. Followers will be informed on comments and changes.

Follow	- 🎬		Hide
	7	The Followers	

Make Your Teammates Follow a Task

You can add your teammates as followers of a task. You do this when you think that they should be informed when there is an update of the task. To add your teammate as a follower, click on the add button next to the **Follow** button or next to the list of followers, then select the member to add as a follower.

	Betty	0.	
	John	J.	
	💐 Osman		
Click here to wr			
Follow	+		Hide

Add teammate as follower

Unfollow task

To unfollow a task, just click the Follow button again in the Task Pane of the task that you want to unfollow.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Adding comment

Comment is a message that can be posted to a task in response to the task submitter's initial message, or as a reply to comment(s) posted by other members.

Comments are posted to ask questions, to describe status or progress, or to provide information about a topic.

Adding a comment

To add a comment to a task:

- 1. Open the details of the task in Task Pane. If the task is inside a Task Pool, open the Task Pool from the Left Pane and select the task from the tasks list. If the task is one of a task assigned to you, find it in the My Tasks page. You can also find from tag, based on their due status, etc.
- 2. Click on the comment area at the bottom of the Task Pane.



3. Type your comment. If necessary, add supplementary file attachment to your comment by clicking **Attach file** next to the **Post** button, and selecting the file to attach. You may attach multiple files to your comment.



Post a comment

4. Click **Post** to send out your comment. Followers and assignees of the task will receive a message in their inboxes.



Comment posted

Replying a comment

To reply someone's comment, type your comment in the comment area, click on the up arrow next to the **Post** button, and then send out your reply by selecting **Post and Assign to %MEMBER%** where %MEMBER% is the person who sent you the his comment previously. By doing so, your comment will be be sent out and %MEMBER% will be set as the assignee of the task.

	John Osman, you can find the archive borrow log in my finger drive.	2015-07-31 16:38
Where	is your finger drive?	
Pos Pos	Attach file	Complete

Post and assign to

Replying with attachment

You can attach file(s) when replying a comment. The file(s) can be what you are requested to deliver, or to help you explain a request, etc. To attach a file, perform any of the following steps:

- Click on Attach file below the comment area and choose the files to attach. Note that you can select multiple files in the file chooser.
- Drag the files directly from your system to the comment area.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Using attachment

Attachment is a file that you can include as part of your task, or comment. It can be a Word document, a PDF file, an image, a video, or virtually any other type of file. An attachment can be the a piece of work expected to be delivered (e.g. an image of screen design), or for detailing a task when text content is not enough.

To add an attachment to a task:

- 1. Open the details of the task in Task Pane. If the task is inside a Task Pool, open the Task Pool from the Left Pane and select the task from the tasks list. If the task is one of a task assigned to you, find it in the My Tasks page. You can also find from tag, based on their due status, etc.
- 2. On top of the task subject, click on the **More** button on the right hand side.
- 3. Select Attach from Local Drive from the drop down menu.

l	Me New	10 > 2015-08-14
F	Reporting - Library Management Sy	rstem 💊 🖉 🗮 其
	Develop borrow log	Share (Ctrl+\)
	Click here to edit	Duplicate this Task
• • •	Submitted by Stephen.	Attach File from Local Drive
	Stephen assigned to Osman.	New Subtask
	Osman, you can find the arch in my finger drive.	Full Screen
	Osman assigned to John.	2015-07-31 16:40
	Osman Where is your finger d	rive? 2015-07-31 16:40

Upload an attachment

4. Select the file in the file chooser. From now on, team members can access the attachment in the Attachment section of this task.



Attachment uploaded

Downloading all attachments

To download attachments to your local drive:

- 1. Open the details of the task in Task Pane. If the task is inside a Task Pool, open the Task Pool from the Left Pane and select the task from the tasks list. If the task is one of a task assigned to you, find it in the My Tasks page. You can also find from tag, based on their due status, etc.
- 2. On top of the task subject, click on the **More** button on the right hand side.
- 3. Select **Download All Attachments (zip)** from the drop down menu. This begins downloading and will find a zip of attachment in your download folder when finished.

📰 Me 🛛 New	10 > 2015-08-14	
Reporting - Library Managemer	nt System 💊 🖉 🗮 其	
Develop patron activi	Share (Ctrl+\)	
Click here to edit	Delete this Task	
Submitted by John.	Duplicate this Task	• •
John assigned to John.	Attach File from Local Drive	
John attached company-logo.	Download All Attachments (zip)	
YOUR COMPANY	Delete Attachment	
company-logo.jpg	New Subtask	
John attached borrow-log-ref.	Full Screen	

Download attachments as zip

Deleting attachment

If an attachment was added to a task by mistake, you can delete it from the task by following the steps below.

- 1. Open the details of the task in Task Pane. If the task is inside a Task Pool, open the Task Pool from the Left Pane and select the task from the tasks list. If the task is one of a task assigned to you, find it in the My Tasks page. You can also find from tag, based on their due status, etc.
- 2. On top of the task subject, click on the **More** button on the right hand side.
- 3. Select **Delete Attachment...** from the drop down menu.

📰 Me 🛛 New	10 > 2015-08-14	
Reporting - Library Managemer	t System 💊 🖉 🗮 其	
Develop patron activi	Share (Ctrl+\)	
Click here to edit	Delete this Task	
Submitted by John.	Duplicate this Task	•
John assigned to John.	Attach File from Local Drive	
John attached company-logo.	Download All Attachments (zip)	
YOUR COMPANY	Delete Attachment	
company-logo.jpg	New Subtask	
John attached borrow-log-ref.	Full Screen	

Delete attachments

4. This lists the files attached to this task. Click on the delete button next to the file(s) that you want to delete.

	🔀 Me New	10 > 2015-08-14	
	Reporting - Library Management System	Attachments (2)	
	Develop patron activity report	t	
	ompany-logo.jpg	2015-07-31 16:43	
• •	borrow-log-ref.pdf	2015-07-31 16:44	• •
		one	
	John attached company-logo.jpg	2015-07-31 16:43	
	YOUR COMPANY		
	company-logo.jpg		
	John attached borrow-log-ref.pdf	2015-07-31 16:44	
	Dele	te a file	

- 5. Choose Yes when you are prompted to confirm deletion.
- 6. Click Done when finish.

Viewing an attachment

To view an attachment, simply click on the filename or the preview image (for image file type). For image and video attachment, the file will be opened in a popup browser, allowing you to view the file content directly without having to download the file to your computer. If you want to download the file, click on the download link at the bottom of browser.

Tasifier -	« My Tasks	Me New	10 > 2015-08-14	
1			۲	:
H M				
2 In 10				43
	A	YOUR COMPANY		
Task F				44
Book Rep.				
Memb				
	company	y-logo.jpg (1 of 1)		
Pow et la classificación		Follow C.		lide

Clicking on the file link in attachment browser to download the attachment

Related Resources

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Including Teamwork File/Folder in task description/comment

When modeling, there may be external resources you want to attach to a model which help to describe it in detail or include data that cannot be modeled within the tool, like a text document. For example, you may want to attach a scanned image of a transaction receipt to a diagram that describes the transaction process so that the analyst can design the new system based on the image. Or maybe an image file showing the user's expectation of the user interface.

Visual Paradigm features a project-based file repository for storing and managing these files, known as teamwork files. When creating a task in Tasifier, or when adding a comment, you can include such a teamwork file as part of the content by adding its URL into the content.

To include a teamwork file in task description/comment:

1. In Visual Paradigm, select View > Project Browser from the toolbar to open the Project Browser or press Ctrl-Shift-B.



Opening Project Browser

2. Open the Files page.

Diagrams Model Structure	Files	My Recent	Team Recent
--------------------------	-------	-----------	-------------

Selecting the Files page

3. Look for the file or folder that you want to include in Tasifier. Right click on it and select Copy URL from the popup menu.



4. In Tasifier, paste the copied URL into task description or in a new comment.

https://demo-vp.vpository.com/files/T7Z2omqGAqAKagAU/cbJLsmqGA	AqAKagOy
	Ι
Post Attach file	Complete

URL pasted

5. Confirm the change in task description or post the comment. If the file is an image, you can see it directly in the task description or in the comment posted. If the file content cannot be rendered, the file will appear as a link. You can click on it to view it in a popup browser.

Related Resources

The following resources may help you learn more about the topic discussed in this page.

Visual Paradigm on YouTube

Contact us if you need any help or have any suggestion

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Subtasks

A Subtask is a unit of work that is a breakdown of a bigger piece of work. You add subtask when you want to break a task into smaller parts to achieve better management and better use of resources.

Adding a subtask

- To add a subtask:
- 1. Open in Task Pane the details of the task that you want to create subtask from. If the task is inside a Task Pool, open the Task Pool from the Left Pane and select the task from the tasks list. If the task is one of a task assigned to you, find it in the My Tasks page. You can also find from tag, based on their due status, etc.



Viewing task's details

2. On top of the the subject of task, click on the Subtasks button.

🎒 Me 🛛 To do	9 > 2015-08-14
Testing - Library Management System	• @

To add subtasks

3. This popup the subtask list, with an empty row in it. The list is where you can view and add subtasks. Click on the empty row and enter the subject of the subtask. (You will fill in the task details later on)



4. Press Enter to confirm. You are now on a new row and you can start entering the subject of another subtask, if any. If you have finished entering all tasks, just leave the last row empty.



5. Now, you can optionally enter the task description. If the subject is clear enough, this step can be skipped. If you want to enter the details of task, move your mouse pointer over the subtask you created and click **Details>** to open the Task Pane.

1	Ме	To do	9	> 2015-08-14		
Testin	ıg - Lib	rary Management System 🛛 💊 🦉	@ ⅲ	Subtasks (0 / 2)	E	
Test	t the	login feature				
000 000 000		Password text not masked		Deta Jm	ails >	
 2		Broken "Retrieve Password"	link	2015-08	3-17	•••
		Edit subtask's d	letails			

6. Now, you can enter task description. You can also edit the task by tagging, setting assignee, due date, etc. Note that you can navigate back to the parent task by clicking on the link above the task subject in Task Pane.



Subtask opened in Task Pane

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Viewing other member's tasks

You can review the workload of teammates by opening their My Tasks page and read the tasks listed there. To open a team member's My Tasks page, click on Members at the bottom of the Left Pane. Then, click on his/her profile photo.

A Book Borrowing
Reporting
Testing
User Manual
Members
Powered by Visual Paradigm

Open another team member's My Tasks page

You will then see his/her My Tasks page in the Main Pane.

You can also create task directly in his/her My Tasks page, or prioritize his/her tasks via drag-and-drop. Here is a situation where this is especially useful. Suppose you have invited several team members to come to your seat to have a short discussion. When the discussion is about to end, you want to plan tasks for each member. By navigating to individual member's My Tasks page, you can easily plan tasks for them and prioritize their workload.

« Osman

Sort	Sort by Priority Filter Change Q Search					
То	do					
Ne	W					
1	Write user manual for "Book Check-in" feature	2015-08-23	User Manua			
2	Write user manual for "Book Check-out" feature	2015-08-28	User Manua			
3	Write user manual for "Installation"	2015-08-20	User Manua			
4	Write "Setup Guide"	2015-08-14	User Manua			
5	 Develop return log 	2015-08-14	Reporting			
Pe	nding					

Another team member's My Tasks page

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion
Breaking down a task into stages

Software development is a team work. In most cases, a piece of work is done not by a single person but by a number of team members who possess different skills such as graphics design, system analysis, project management, programming, testing, database administration, etc. In Tasifier, when you want to manage a development activity that involves the participation of multiple team members, you can create a task with multiple 'stages'.

A stage is a turn of work within a task. Each stage represents a unique piece of work to be done by a specific team member. When all stages are completed, the task is done. Let's say for example you want to create a task for supporting a system login function, you might create a task with three stages: (1) Design login page, (2) Implement login page, (3) Test login page. Of course this is just an example. In practice, any stage can be created as an independent task. It's all about your team's preferences. Usually, if a piece of work is complex, or will involve a lot of communications, it will be created as an independent task, instead of a stage. A stage is, usually a relatively smaller piece of work.

Creating task with stages

To create task that has multiple stages:

- 1. Create a task and give it a subject first. Here we assume that you are clear about how to create tasks (including subtasks). If not, click here for details about task creation or click here for details about subtasks.
- 2. If you decided to finish this task with multiple stages, it's time to enter the description of the first stage, which is likely the requirements of the first stage or information that assists a team member to execute the work. Click below the subject of task to enter the edit mode of description.

None	10 > 2015-08-28
General - Online Training Center	♥ @ \\ !
Support system login page	
Click here to edit	

To enter stage description

Enter the description. Note that you are entering the description of the first stage, not the description of the entire task. Tasks with stages do
not have their own description. You will learn how to add stages in coming steps. Once a stage is added, the description you entered now will
become the description of the first stage.

None	10 > 2015-08-28
General - Online Training Center	♥ @ \\ I \
Support system login page	
Please provide the screen design of the login page. Fields: - ID - Password - Login/OK button Attach file	

Stage description entered

4. Set the assignee at the top left of the Task Pane. Again, the assignee set here is the assignee of the first stage, not the assignee of the entire task.



5. You may optionally change the **Due Date** at the top right corner in the Task Pane. Similar to stage description and assignee, the due date set here is the due date of the first stage, not the due date of the entire task.

Betty				10	> 20)15-0	8-28	
Due Date:	2015-08-28	 	٠					
Duration:	10 +	÷	14	A	ugus	t 201	5	→
Repeat:	None	Su	Мо	Ти	We	Th	Fr	Sa
General - Online Training Center		26	27	28	29	30	31	1
		2	3	4	5	6	7	8
Support system login page		9	10	11	12	13	14	15
Please provide the screen design of the lo	ogin page.	16	17 _Ռ	18 1	19	20	21	22
Fields: - ID		23	24	25	26	27	28	29
- Password - Login/OK button		30	31	1	2	3	4	5

Pick up a due date

6. Next to **Due Date**, you may set a team member to verify the whole task when all stages are completed. When all stages are completed, that member will see the task listed in his/her My Tasks page, pending for his verification. If you do not specify a team member here, once you complete the task it will be closed immediately.

Betty	1 > 2015-08-17
General - Online Training Center	Verify by John
Support system login page	
Please provide the screen design of the login page. Fields:	Betty
- ID	📑 John
- Password - Login/OK button	Sman Osman
20911 01 00001	Stephen Stephen
Submitted by John.	None
John changed description.	
John changed due date to 2015-08-17.	2015-08-14 13:16

Select a team member to verify the task

7. On top of the task subject, click on the **More** button on the right hand side.

Betty	1 > 2015-08-17
General - Online Training Center	♥ Ø ⅲ
Support system login page	New Stage
Please provide the screen design of the login page.	Share (Ctrl+\)
Fields: - ID	Delete this Task
- Password	Duplicate this Task
- Login/OK button	Attach File from Local Drive
Submitted by John.	New Subtask
John changed description.	Full Screen
John changed due date to 2015-08-17.	2010-00-14 13:10

Clicking on the More button

- 8. Select New Stage from the drop down menu.
- 9. Now, you can enter and set the description, subject, assignee and due date of the second stage. Assignee can be set by clicking on the empty box next to the subject of stage.



Editing stage description

To create the next stage, click on Stage View on the right hand side of the stage subject. 10.



Opening Stage View

Click on the + button in the box of Next Stage. 11.

		Support system login page	
		Please implement the login page based on the design given by Betty. (Make sure password are masked.)	
0			(+)
	Previous Stage	2015-08-31	Next Stage

Creating a stage

12. You can then edit the details of the stage.



- 13. Repeatedly create all stages. When finished, click **Back**.



Back to the task

The task will be assigned to the assignee set to the first stage. He/she can start working on the first stage.



Effect of completing a stage

When you have finished your work required in a stage, click on the **Complete Stage** button at the bottom right of the Task Pane. This will activate the next stage, and the stage you just completed will become inactive. The task will be assigned to the team member set to the assignee of the next stage. He/she can start working on it.

Design is ready. Please check at: \2015\online-training-center\features\login\login-page- <u>main.png</u> \2015\online-training-center\features\login\login-page- <u>pwd-invalid.pn</u>	g
Post Attach file	Complete Stage
Follow +	Hide

Completing a stage

The completion of all stages will trigger the completion of the entire task. Same as a general task being marked completed, the team member who was set to verify the task will see the task listed in his/her My Tasks page, pending for his verification.

Browsing stages

You may want to view the details of one of stages of a task. If that's not the active stage, you can browse for it by taking the steps below.

- 1. Open the task.
- 2. Click on the Stage View button at the top of the task. Note that this button only appear when the task contain stages.



Opening Stage View

3. Click Previous Stage or Next Stages to navigate to the task you want to view.



Navigating to the previous stage

4. Click on the stage to open it.

Support system login page Image: Support system login page. Please provide the screen design of the login page. Fields: - ID Password - Login/OK button Completed		
Fields: - ID - Password - Login/OK button	Support system login page	
- ID - Password - Login/OK button	Please provide the screen design of the login page.	
- Password - Login/OK button	Fields:	
- Login/OK button	- ID	
Attach file	- Password	
	- Login/OK button	
Completed 2015-08-17 🔶	Atlach file	
completed 2015-08-17 💎		0045 00 47
	completed	2015-08-17 🗸

Viewing previous stage's details

Restarting a stage

If a completed stage was not perfectly done and a rework is needed, you can restart it to let the assignee of that stage work again on that stage. To restart a completed stage, browse for it first (read the previous seciton for steps). Then, click on the **More** button and select **Restart Stage** from the drop-down menu.

	=
Support system login page	Share (Ctrl+\)
	Restart Stage
Please provide the screen design of the login page. Fields:	New Stage
- ID	Delete Stage
- Password - Login/OK button	Full Screen
Attach file	
	2015-08-17 🔶

Restarting a stage

Re-ordering stages

You can also re-order stages in case their placesment are wrong. To move a stage, browse for it first (read the previous seciton for steps). Then, click on the **More** button and select **Move Before/Move After** from the drop-down menu.

	E :
Support system login page	Share (Ctrl+\) New Stage
Please test the login page. (Ask Osman for instructions if needed)	Delete Stage
	Move Before
	Full Screen
Attach file	
	2015-09-14 🔶

Moving a stage

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

My Tasks

What is My Tasks?

My Tasks is the page where you can find all the tasks that are currently assigned to you. This page details the usage of My Tasks page in Tasifier.

Prioritizing My Tasks

To focus on a small and manageable amount of related works at a given time and devote to them with more attention will help save your time without sacrificing the quality of work. This page details the steps you need to take to prioritize your own tasks, in the My Tasks page of Tasifier.

What is My Tasks?

My Tasks is the page where you can find all the tasks that are currently assigned to you. You can open My Tasks page from the Left Pane.

Tasifier -	« My Tasks	
John -	Sort by Priority - Filter - Change -	Q Search
	To do	i
📕 My Tasks 🛛 🌀	1 Upgrade the O/S to new version	2015-08-17
🙈 Inbox		
🗑 Overdue 👻		
🖏 Tags 🕂	New	
👚 Library Manageme 👻	1 • Write user manual for "reporting" feature	2015-08-14 User Manual
	2 Develop search statistic report	2015-08-14 Reporting
Task Pools + Planning *	3 Develop patron activity report	2015-08-14 Reporting
Members	 Develop patron registration statistics report 	2015-08-14 Reporting
	5 • Develop book borrowing report	2015-08-14 Reporting
	6 • Develop borrow log	2015-08-14 Reporting
	Pending	
Powered by Visual Paradigm		

My Tasks

We recommend users check the My Tasks page every morning, review the active tasks and plan the tasks to be performed within the day. Three lists are set up for the categorizing of tasks, base on their status. The lists are namely **To do**, **New** and **Pending**. The **To do** list is for listing tasks that should be tackled within a short period of time. The **New** list is for listing tasks you recently received. The **Pending** list is for listing tasks that will be tackled later on.

Besides viewing tasks, the My Tasks page also serves the purpose of creating tasks for yourself. Usually, you create tasks in My Tasks page when you want to add a note to yourself, to remind yourself to do something. You are the sole responsible person for the task, not anyone else. Note that tasks created in My Tasks page do not belong to any Task Pool, although you can move them to a Task Pool later on.

Because the task list is automatically updated, some users like keeping My Tasks page opened throughout the day so that they can see the tasks assigned to them lately.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Prioritizing My Tasks

Tasks are streaming in endlessly, but your time is limited. To focus on a small and manageable amount of related works at a given time and devote to them with more attention will help save your time without sacrificing the quality of work. In Tasifier, tasks that have been assigned to you are by priority listed in the **To do**, **New** and **Pending** lists of the My Tasks page. Tasks that have been assigned to you lately are automatically put under the **New** list. By evaluating your own schedule and the complexity of task, you can move the task to the **Pending** list for future processing, or to the **To do** list if you managed to tackle it soon. With this good practice, both the tasks and your time are well-managed.

We recommend users review the tasks you have every morning, prioritize them and follow the prioritized task list to work throughout the day. In Tasifier, prioritizing of tasks can be done easily by drag-and-drop, or via the popup menu.

Prioritizing one task

To prioritize a task in My Task page:

1. Move your mouse pointer to the task that you want to prioritize.

1		Upgrade the O/S to new version	2015-08-17	
Ne	ew			
1	•	Write user manual for "reporting" feature	2015-08-14	User Manual
È.	0	Develop search statistic report	2015-08-14	Reporting
3	•	Develop patron activity report	2015-08-14	Reporting
4	•	Develop patron registration statistics report	2015-08-14	Reporting
5	•	Develop book borrowing report	2015-08-14	Reporting
6	•	Develop borrow log	2015-08-14	Reporting
	endi	20		

Move mouse pointer over a task

2. Press on it and hold your mouse button.

1	•	Write user manual for "reporting" feature	2015-08-14	User Manua
₽	0	Develop search statistic report	2015-08-14	Reporting
3	•	Develop patron activity report	2015-08-14	Reporting
4	•	Develop patron registration statistics report	2015-08-14	Reporting
5	•	Develop book borrowing report	2015-08-14	Reporting
6	•	Develop borrow log	2015-08-14	Reporting

Drag task

3. Drag it to the desired list.

Т	o do		
1	Upgrade the O/S to new version	2015-08-17	
1	evelop search statistic report		
Ne	ew		
1	Write user manual for "reporting" feature	2015-08-14	User Manual
		2015-08-14 2015-08-14	User Manual Reporting

Dragging a task to another list

4. Release your mouse button to move the task to the place and position desired. You should see a pink line that indicates the position of task that will appear upon releasing mouse button.

Sort	by I	Priority • Filter • Change •	Q Search	earch	
То	o do)			
1		Upgrade the O/S to new version	2015-08-17		
	\odot	Develop search statistic report	2015-08-14	Reporti	
_	W				
1	•	Write user manual for "reporting" feature	2015-08-14	User Manu	
2	•	Develop patron activity report	2015-08-14	Reportir	
3	•	Develop patron registration statistics report	2015-08-14	Reporti	
4	•	Develop book borrowing report	2015-08-14	Reporti	
5	•	Develop borrow log	2015-08-14	Reporti	
		ing			

Task re-ordered

Prioritizing task using the drop down menu

Instead of using drag-and-drop, you can prioritize a task via the drop down menu. To do so, click on the down arrow button in front of the desired task. Then, select **Move to To do** to **Move to Pending** to move it instantly to the desired list,

Т	o do			
1	Upgrade the O/S to r	new version	2015-08-17	
00 00 00	 Develop search statis 	stic report	2015-08-14	Reporting
	ew			
	ew			
00 00 00	 Write user manual fo 	r "reporting" feature	2015-08-14	User Manual
2	Move to To do (Top)	/ report	2015-08-14	Reporting
3	Move to To do	ation statistics report	2015-08-14	Reporting
4	Move to Pending	ng report	2015-08-14	Reporting
5	 Develop borrow log 		2015-08-14	Reporting

Move a task from New to To do

Prioritizing mutliple tasks

To prioritize multiple tasks:

- 1. Click on a task row.
- 2. Press and hold the **Shift** or **Ctrl** key.
- 3. Click on another task to perform a multiple selection. If you are pressing the Shift key, tasks within the first and second selected tasks are selected. If you are pressing the Ctrl key, only the first and second task are selected.
- 4. Press on your selection and hold your mouse button.

N	ew				
1	•	Write user manual for "reporting" feature		2015-08-14	User Manual
00 00 00	0	Develop patron activity report		2015-08-14	Reporting
00 00 00	0	Develop patron registration statistics report	6	2015-08-14	Reporting
4	•	Develop book borrowing report		2015-08-14	Reporting
5	•	Develop borrow log		2015-08-14	Reporting

Tasks selected

5. Drag it to the desired list.

Ne	ew			
1	•	Write user manual for "reporting" feature	2015-08-14	User Manual
÷	0	Develop patron activity report	2015-08-14	Reporting
1	0	Develop patron registration statistics report	2015-08-14	Reporting
÷.	•	Develop book borrowing report	2015-08-14	Reporting
5	•	Develop borrow log	2015-08-14	Reporting

Dragging tasks to another list

6. Release your mouse button to move the task to the place and position desired. You should see a pink line that indicates the position of task that will appear upon releasing mouse button.

Related Resources

- Visual Paradigm on YouTube
- <u>Contact us if you need any help or have any suggestion</u>

Inbox

What is inbox?

Inbox is the place where you can access all the notifications. You can open the inbox from the Left Pane. In this page, you will see the situations when you will receive a notification in inbox.

Working with inbox

When you see a number appear next to Inbox, in Left Pane, this means that you have unread notifications. This page shows you how to work with the inbox.

What is inbox?

Inbox is the place where you can access all the notifications. You can open the inbox from the Left Pane.

You receive a notification when:

- Someone has posted a comment to a task when you are the assignee of that task, and the task is not complete yet.
- Someone has posted a comment to a task when you are the verifier of that task, and the task is marked complete.
- Someone has posted a comment to a task when you are the follower of that task.
- Someone has modified a task when you are the assignee of that task, and the task is not complete yet. Modifications include changing the subject, task and due date of task.
- Someone has modified a task when you are the verifier of that task, and the task is marked complete. Modifications include changing the subject, task and due date of task.
- Someone has modified a task when you are a follower of that task. Modifications include changing the subject, task and due date of task, as well as to mark the task complete.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Working with inbox

When you see a number appear next to **Inbox**, in Left Pane, this means that you have unread notifications. The number stands for the number of unread notifications. It will dismiss when all notifications are read.

John 👻	
📕 My Tasks	
🖄 Inbox	1
overdue	*
🆏 Tags 🕂	
👚 Library Manageme	*
Notification received	

To read a notification, click Inbox from the Left Pane.

The unread notification(s) will all be listed in the Main pane. Read through them and take appropriate actions. You can read the task's details by clicking on its subject. You can follow the task. Finally, click **Mark as Read** to tell Tasifier that you have read the notification. If you want to mark all the unread notification as read, click **Mark All as Read** at the top of the inbox.

	manual for "Shortcut k	eys			
5	Betty				2015-08-03 16:07
	John, do we need a Mac v	ersion for this	manual?		
lark as Rea	I Unfollow Task				
how Read N	lessages				

Related Resources

« Inhov

- Visual Paradigm on YouTube
- Contact us if you need any help or have any suggestion

Due date and overdue

What is due and overdue?

All tasks have a deadline. In Tasifier, task submitter can set a deadline to a task by setting its due date. This page talks about due and overdue in detail.

Editing due date of task

Tasifier enables you to set due date to task, define repeated task and add reminder. This page details all the steps required.

Viewing soon-to-due tasks

You can list out the tasks that are assigned to you, and are currently overdue or will become overdue after certain period of time. This pages shows you the steps in detail.

What is due and overdue?

All tasks have a deadline. In Tasifier, task submitter can set a deadline to a task by setting its due date. Assignees are expected to complete the task on or before the deadline.

Due date is the date by which member should complete a task. For example, setting 15, August to be the due date of a task means that the task is expected to be completed on or before 15, August 23:59:59.

Overdue is a status of task that means that the due date of the task has elapsed and the task hasn't been completed by that moment.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Editing due date of task

You can set edit due date of task in the Task Pane. To edit due date for a task:

1. Open the task in Task Pane. If the task is inside a Task Pool, open the Task Pool from the Left Pane and select the task from the tasks list. If the task is one of a task assigned to you, find it in the My Tasks page. You can also find from tag, based on their due status, etc.



Selected a task

2. If the task has no due date specified, click **Due Date** at the top right, next to the profile photo of the verifier. If the task already has a due date specified and you want to change it, click directly on the due date.

💐 Osman		10 > 201	5-08-17 പ്ന	10
Du	e Date: 2015-08-		•	
Di	uration: 10	+ -		
F	Repeat: None	•		
	To edit due	date		

- 3. This shows the due date selection pane. Click on the **Due Date** field or the calendar button next to the field.
- 4. Select the due date from the calendar.



Selecting the due date from calendar

Alternatively, you can specify the due date by adjusting the duration. This is particularly useful when you have an approximation about the number of days required to complete the task. For example, if you think that a feature can be implemented in 4 days, specify 4 to be the duration of the implementation task. The due date will then be calculated automatically.

Ssman 🔡		13 > 2015-08-20
	Due Date:	2015-08-20
	Duration:	13 + - Jhn
	Repeat:	None •
		Adjust duration

Repeated task

Your team may have tasks that need to be performed on regular basis. Here are some examples:

- Produce a beta release daily.
- Pay the monthly salary on the 25th of every month.
- Meet with the stakeholders every three days after the previous meeting.

In Tasifier, you can set a task to be "repeated" so that a new task will automatically be created based that task, on a specified interval. For example, setting a task "Task X" to "repeat daily" will result in having a new task created one day after "Task X" is completed.

To set repeated task:

1. Open the task in Task Pane. If the task is inside a Task Pool, open the Task Pool from the Left Pane and select the task from the tasks list. If the task is one of a task assigned to you, find it in the My Tasks page. You can also find from tag, based on their due status, etc.



Selected a task

2. If the task has no due date specified, click **Due Date** at the top right, next to the profile photo of the verifier. If the task already has a due date specified and you want to change it, click directly on the due date.



To edit due date

3. Click on the drop down menu next to **Repeat**, and select the appropriate option. If you select Daily, a new task will be automatically created one day after the completion of this task, with details of task will be copied from this task.

📰 Me 🛛 To do	👮 10 🗲 2015-08-17
Due Date:	2015-08-17
Duration:	10 + -
Repeat:	Daily 🔻
No task pool - Library Manage	None Daily Weekly
Produce a bet release	Monthly
Click here to edit	Periodically

Select the Repeat option

Here is a description of options available.

Option	Description	
None	No new tasks will be created based on this task. You can set None to cancel the effect of Repeat.	
Daily	A new task will be created based on this task, one day after the completion of this task.	
Weekly	A new task will be created based on this task, on a specific day (Sun - Sat) within a week, after the completion of this task.	
Monthly	A new task will be created based on this task, on a specific day within a month, after the completion of this task.	
Yearly	A new task will be created based on this task, on a specific date within a year.	
Periodically	A new task will be created after a specific number of days since the completion of this task.	
	Repeat options	

4. Click on the drop down menu next to **Repeat**, and select the appropriate option.

Reminding me of due date

Tasifier allows you to lists out the tasks that will be overdue in a certain period of time. This is a useful feature but it requires yourself to manually review the tasks. If you want Tasifier to notify you when a task is about to overdue, you can use the remind feature. Remind works like an alarm. By setting a reminder, you will receive an inbox notification when a task is about overdue.

To add a reminder:

1. Open the task in Task Pane. If the task is inside a Task Pool, open the Task Pool from the Left Pane and select the task from the tasks list. If the task is one of a task assigned to you, find it in the My Tasks page. You can also find from tag, based on their due status, etc.



2. Move your mouse pointer to the due date at the top right of the Task Pane.



3. Click on the alarm clock.

ġ.	9 >	2015-08-14	
-0	_		

Click on the alarm clock

4. Set the time you want to receive the notification message. If you want to receive a notification one week before the due date, set 7. When finish, the task will be moved to the **Pending** list in your My Tasks page.

📰 Me 🛛 Pending	9 > 2015-08-14		
	days before due date. 🔶		
You will receive an inbox notification on August 12 if this is not yet completed.			
Editing the reminder			

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

Viewing soon-to-due tasks

You can list out the tasks that are assigned to you, and are currently overdue or will become overdue after certain period of time, by walking through the steps below:

1. From the Left Pane, click on **Overdue**, then select the due option. If you want to know the incomplete tasks that have already past the deadline, select **Overdue**. If you want to know the incomplete tasks that will become overdue tomorrow, select **Due Tomorrow**.

John -
My Tasks
🗟 Inbox
🗑 Overdue 💿
Overdue
Due Today
Due This Week
Due Next Week
Reporting
Testing
View tasks that will due next week

2. Tasks are listed in the Main Pane row by row. If you've selected to view the tasks **Due This Week** or **Due Next Week**, tasks are grouped by days.

~	Due	Next	Week	09 - 15 August, 3	2015
---	-----	------	------	-------------------	------

Filter - Change -	Q Search	
09 Sunday		
10 Monday		
1 Write user manual for "reporting" feature		User Manual
11 Tuesday		
12 Wednesday		
1 Develop patron activity report		Reporting

Tasks that will become overdue next week

If you've selected **Due Tomorrow**, **Due This Week** or **Due Next Week**, you will see an empty line in each day group. The empty line allows you to create new tasks that have the chosen date set to be the tasks' due date.

Creating a new task that will become overdue on 13, Thursday

Filter

If you want to list *only* tasks that are in a specific tag, use Filter. By clicking on the **Filter** menu, you will see a list of defined tags. By choosing a tag, the task lists in the Main Pane will be updated to list only tasks that are in the tag selected.

To remove a filter, click on the Filter menu again and select **Show All** from the drop down menu.

Search

Search enables you to quickly locate a task, or a set of tasks by entering part of the tasks' names. For example, you can enter "login" to find out all the tasks that contains the word "login" in their subjects, such as "develop the login function", "prepare login screen design", "write login guides", etc.

By clicking on the **Search** field, you can start typing the keyword of task. Press **Enter** to start searching. The task lists in the Main Pane will be updated to list only tasks that have their subjects containing the keyword you entered.

« Searching "Due Next Week09 - 15 August, 2015"

Sort by Last	Modified ~ Q report	
Assigned to	John x	
Due Days	Due within the next	
	Due within the last	
	Due within the period 2015-08-09 1 to 2015-08-15	
Closed Task		
more criteria		Clear Search
4 search	raculte	
4 Sedicii	leauta	
	te user manual for "reporting" feature 2015-08-10	0 User Manu
1 📰 Wri		-
1 📰 Writ 2 📰 Dev	ie user manual for "reporting" feature 2015-08-10	2 Reportir

Search from tasks that will become overdue next week

Related Resources

- <u>Visual Paradigm on YouTube</u>
- <u>Contact us if you need any help or have any suggestion</u>

What is tag?

A tag is a label that helps you identify tasks. Tags are used to categorize tasks so you can view them easier and find them effectively via searching. This page tells you what a tag is and provides some typical usage of tags.

Creating tag

Tags can be created both independent from a task or from a task. This page explains how to create tag from Left Pane and from a task.

Adding tag to task

Add tag to a task to indicate that the task belong to a category, as represented by the tag. This page details the steps involved in adding tag to task.

Viewing tagged tasks

You can list out the tasks that have a specific tag by selecting the tag from the Left Pane. This page details the various way of listing tasks that have a tag added.

What is tag?

A tag is a label that helps you identify tasks. Tags are used to categorize tasks so you can view them easier and find them effectively via searching. Here are some typical usage of tags:

- Categorize tasks by their urgency critical, important, not important
- Categorize tasks by their source internal, from user
- Categorize tasks by their state pending, approved

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Creating tag

Tags can be created both independent from a task or from a task. When you create a tag independent from task, you create it from the Left Pane. When you create a tag from task, you create it from Task Pane.

Creating tag from Left Pane

To create a tag readily available to be used by tasks:

1. Click on the add button next to the **TAGS** caption.

John 👻
📱 My Tasks 🛛 2
🗟 Inbox
🧭 Overdue 🗸
🖏 Tags 抗 Show
👚 Library Manageme 👻
Task Pools + • Working -
Reporting
User Manual
Create a tag

2. Enter the name of the tag in the Main Pane and press **Enter** to confirm.

« Critica	al 🗙	•			
No sort -	Filter -	Change -		Q Search	
			Naming a tag		

3. Give the tag a color to make it more visually unique. Colored tags will appear in Task Pane when viewing a task. Giving an appropriate color to a tag will help team members realize the nature or state of the task easier. Click on the down arrow next to the tag name to popup the **Tag Color** pane.





4. Select a color.



Creating tag from task

Tag can also be created when needed, that is, at the moment you edit a task. Creating a tag from a task will both create that tag and add the tag to the task.

To create tag from task:

- 1. Open the Task Pane of a task.
- 2. In between the task description and the comment logs there are few menus. Click on the button with the tag icon on it.

« My Tasks	Me New	10 > 2015-08-17
Sort by Priority - Filter - Ch	Reporting - Library Management System	•@ :≡ :
To do 1 Upgrade the O/S to new versid 2 Produce a beta release . New . Develop patron registration 2 Write user manual for "reporting	Develop p Click here tr Cancel Submitted by Stephen. Stephen assigned to John.	2015-08-03 16:43 2015-08-03 16:46
	Click here to write a comment	
	Follow +	Hide

To edit the tag selection of a task

- 3. This shows a drop down menu for tag selection. Enter the name of the tag in the text field.
- 4. Click **<Create new>** or press Enter.



Create a tag

Tag is created and is added to the task. You can view the tag under the task name.

Me New	10 🔪 2015-08-17
Reporting - Library Management System	ءَ 🖉 🖉
Develop patron registration stat	tistics report
Important x	
Click here to edit	
D -	
Submitted by Stephen.	2015-08-03 16:43
Stephen assigned to John.	2015-08-03 16:46
John added tag Important.	2015-08-03 16:56

Tag is created and added to task

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Adding tag to task

Add tag to a task to indicate that the task belong to a category, as represented by the tag.

To add a tag to a task:

- 1. Open the Task Pane of the task to edit.
- 2. In between the task description and the comment logs there are few menus. Click on the button with the tag icon on it.

« User Manual -	💐 Osman	14 > 2015-08-23
+ New Task Sort by Priority -	User Manual - Library Manageme	nt System
9 active tasks 2 Write user manual for "Book G 3 Write user manual for "Book G 4 Write user manual for "Book G 5 Write user manual for "Installa 5 Write user manual for "Patron 7 Write "Setup Guide" 8 Write user manual for "Patron 7 Write "Quick Start Guide" 9 Write user manual for "Shortcutor	Write user Click here to Submitted by Stephen assir Stephen char Cancel	ure 08-03 16:44 08-03 16:45 08-03 16:45
	Click here to write a comme	nt
	Follow +	Hide

To edit the tag selection of a task

3. This shows a drop down menu for tag selection. Click inside the check-box(es) of the tags to add to the task. If necessary, you can add multiple tags to the task.

Sman 🔡		14 > 2015-08-23
User Manual - L	ibrary Management System	● @ III :
Write user Click here to	Tag	ure
Submitted by Stephen assig Stephen char John added ti	Critical Important Not Important Apply	5-08-03 16:44 5-08-03 16:45 5-08-03 16:45 5-08-03 17:02
John removed	tag Critical.	2015-08-03 17:02

Selecting the tag to add to the task

4. Click Apply. Tag is added to the task and you can view it under the task name.



Adding tag to multiple tasks

Instead of adding tag to tasks one by one, you can also assign tags to multiple tasks at once.

To add a tag to multiple tasks:

- 1. Select the tasks to add tag. You can perform multi-selection by pressing the Ctrl key.
 - « User Manual -

+ N	lew Task Sort by Priority Filter Change Q Search	
9	active tasks	0 closed
10000	Write user manual for "Book Check-in" feature	2016-04-04
0000	Write user manual for "Book Check-out" feature	2016-04-04
3	Write user manual for "Book Searching" feature	2016-04-04
00000	Write user manual for "Installation"	2016-04-04
5	Write user manual for "Reporting" feature	2016-04-04
10 00 00	Write user manual for "Patron management"	2016-04-04
7	🛃 Write Setup Guide	2016-04-04
8	Write Quick Start Guide	2016-04-04
9	Write user manual for "Shortcuts"	2016-04-05
	-	

Select tasks

2. Drag the selected tasks to the target tag on the Left Pane.



Drag tasks to tag

3. Release the mouse button. The tag is now added to the chosen tasks.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Viewing tagged tasks

You can list out the tasks that have a specific tag by selecting the tag from the Left Pane.

Tasifier -	« Critical 📕 🕶		
John -	No sort * Filter * Change *	Q Search	
	5 active tasks		0 closed
📕 My Tasks 🚺	1 Write user manual for "Book Check-in" feature	2015-08-23	User Manual
🚔 Inbox	2 Write user manual for "Installation"	2015-08-20	User Manual
👿 Overdue 👻	3 Write user manual for "Patron management"	2015-08-29	User Manual
🖏 Tags 🕇	4 E Develop book borrowing report	2015-08-17	Reporting
	5 E Develop patron activity report	2015-08-17	Reporting
Important Not Important Library Manageme Task Pools + • Working -			
Reporting			
User Manual			
Members			
Powered by Visual Paradigm			

Viewing tasks that have tag Critical added

Sort tasks by assignee

By sorting tasks by assignee, tasks are sorted and grouped by the name of the team members to whom they are assigned. Tasks that have no assignee, if any, are grouped and put at the final group, named Non assigned.

ort by A	Assignee - Filter - Change -	Q Search	
John			
1	Develop book borrowing report	2015-08-17	Reportin
2	Develop patron activity report	2015-08-17	Reportin
	in		
1 🗮		2015-08-23	User Manu
1 2	Write user manual for "Book Check-in" feature	2015-08-23 2015-08-20	User Manu User Manu

Sort tasks by assignee

Sort tasks by due date

Tasks with due date set are put at a grouped named **Active**, and are sorted base by their due dates. Tasks without due date set are put in a group named **No due date**.

« Critical 📕 -

Sort by Due Date - Filter - Change -	Q Search	
Active		
1 Develop book borrowing report	2015-08-17	Reporting
2 Develop patron activity report	2015-08-17	Reporting
3 Write user manual for "Installation"	2015-08-20	User Manual
4 Write user manual for "Book Check-in" feature	2015-08-23	User Manual
5 Write user manual for "Patron management"	2015-08-29	User Manual

Sort tasks by due date

Filter

If you want to list *only* tasks that are in a specific tag, use Filter. By clicking on the Filter menu, you will see a list of defined tags. By choosing a tag, the task lists in the Main Pane will be updated to list only tasks that are in the tag selected.

To remove a filter, click on the Filter menu again and select Show All from the drop down menu.

Search

Search enables you to quickly locate a task, or a set of tasks by entering part of the tasks' names. For example, you can enter "login" to find out all the tasks that contains the word "login" in their subjects, such as "develop the login function", "prepare login screen design", "write login guides", etc.

By clicking on the **Search** field, you can start typing the keyword of task. Press **Enter** to start searching. The task lists in the Main Pane will be updated to list only tasks that have their subjects containing the keyword you entered.

« Searching "Critical"

Sort by Last Modified -	Q report	
Tag Critical x Closed Task 🗹		
more criteria		Clear Search
2 search results		
1 Develop patron activity report Critical	2015-08-17	Reporting
2 Develop book borrowing report Critical	2015-08-17	Reporting

Search tasks

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Tools of Visual Paradigm Tasifier

Reporting support

Measure the workload and capability of your team by producing a report that lists out the not-yet-performed, executing and completed task(s) of each team member.

Reporting support

Measure the workload and capability of your team by producing a report that lists out the not-yet-performed, executing and completed task(s) of each team member. With this report, you can distribute new task(s) or re-assign task(s) to them based on their individual workload and capability, making the team more efficient and productive.

To produce a report:

1. Click on the project from the Left Pane.

John 👻
My Tasks
🖄 Inbox
The second secon
🖏 Tags 🕂
Critical
Important
Not Important
👚 Library Managame 💿
Task Pools + • Working -
Reporting
User Manual
Click on a project

- 2. In the Main Pane, click on the down arrow next to the project name. Then, select **Report** from the popup menu.
 - « Library Management System O

Sort by Priority * Filter * Chan Report	arch
No task pool	ŕ
1 Upgrade the O/S to new version	2015-08-17
2 Produce a beta release	2015-08-17

Select Report

3. Enter the criteria and click Generate. Here is a description of criteria:

Field	Description
Day range	The range of date to report.
Scope	The project and Task Pool to include in reporting.
Member involved	The member to inpsect workload.
Data	The type of data interested. New - Tasks newly assigned to the chosen member within the selected day range. Processed - Tasks ever replied by the chosen member within the selected day range. Completed - Tasks completed by the chosen member within the selected day range. Closed - Tasks closed by the chosen member within the selected day range. Outstanding - Overdue tasks that are remain opened within the selected day range.

Description of properties in reporting

4. The Report page is opened with tasks categorized. You can click on a task to open it and read its detail. If you are interested in the statistic instead of the actual tasks involved, when you generate a report, choose **Generate (Statistic)** instead.

Related Resources

Visual Paradigm on YouTube

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Contact us if you need any help or have any suggestion

Tasifier in Visual Paradigm

Using Tasifier in Visual Paradigm

Besides accessing Tasifier via a web browser, you can also access Tasifier from within Visual Paradigm, the modeling environment. This page details the steps you need to take to open Tasifier in Visual Paradigm.

Use Case and Task Pool

When Tasifier is run inside Visual Paradigm, you can plan development tasks base on a use case and monitor the progress of supporting the use case. This page shows you how.

Attaching diagram when adding comment

When Tasifier is run inside Visual Paradigm, you can attach diagrams when you post a comment. This page shows you how it works.

Using Tasifier in Visual Paradigm

Tasifier is a task management tool made for software development team.

Besides accessing Tasifier via a web browser, you can also access Tasifier from within Visual Paradigm, the modeling environment. The seamless integration between Visual Paradigm and Tasifier allows software developers to manage software development activities as well as the design works within a single, unified environment - the visual modeling environment.

9	Library Management System - Visual Paradigm Enterprise Edition	- 0	- 2
Project Diagram View Team	Tools Modeling Windows Help		
Commit Update Teamwork Files	Restronia Visual Utilities		
		001	unk
Tasifier	« My Tasks		
John	Sort by Priority * Filter * Change *	Q Search	
📱 My Tasks 🔹 🔹	To do		
💌 Inbox	Upgrade the CVS to new version Produce a beta release	2015-08-17 2015-08-17	
🖬 Overdue 🚽		2015-08-17 Book Che	
🖏 Tags +	4 Write user manual for "reporting" feature 5 Develop book borrowing report [25:04]	2015-08-14 Book Chec 2015-08-17 Book Che	
Library Manageme	6 Develop patron activity report Categoria	2015-08-17 Book Che	ick-in
Task Pools + • Working *			
Book Check-in			
Book Check-out	New		
Testing	1 • Write user manual for "Reporting" feature	2015-08-17 User Ma	anua
User Manual	2 🔴 🗐 Broken "Forgot Password" link	2015-08-17 Te	sting
Powered by Vauel Paradigm			
			7

Tasifier running in Visual Paradigm

Opening Tasifier in Visual Paradigm

To open Tasifier in Visual Paradigm, select **Team > Tasifier** from the toolbar. Tasifier will then be opened as a new tab within Visual Paradigm. If you find the Tasifier menu disabled, or failed to have Tasifier opened properly, check the points below:

- You have an active connection with either the <u>VPository</u> or the corporate edition of <u>Visual Paradigm Teamwork Server</u>.
- You are working in a project that has Tasifier enabled. If not, click here to learn how to enable Tasifier.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

User Story and Task Pool

Tasifier is a <u>task management tool</u> provided for free under VPository.com. In Tasifier, development activities are planned as tasks, and these tasks are put under a smartly built container, called Task Pool.

When Tasifier is run inside <u>Visual Paradigm</u>, you can take advantage of the mapping between <u>user story</u> and Task Pool, to plan development tasks base on a user story and monitor the progress of supporting the user story. Developers can always trace the source of a task, which is the user story, ensuring that the design, the implementation and testing are all conducted with user's needs in mind. Project manager won't miss any task because the user stories are seamlessly integrated with the development tasks. The result is a software that is both functional and user friendly.

Creating a Task Pool from a user story

To create task pool from user story:

1. In UeXceler, double click to open the user story where you want to manage its development activities.

	00000.	
An instructor can create new course		
• Write description	5	
Open user story		

- 2. Open the Tasks tab.
- 3. Click on the button Create New Task Pool.



Create task pool

4. In the popup window, enter a name for the Task Pool. If you want to re-use the name of the user story as the name of the Task Pool, just leave it as-is. You can optionally enter the description of Task Pool, too. We suggest to use a short name here to make it easier to identify the task pool in Tasifier.

Link User Story to New Task Pool	Х
Create New Task Pool	
Create a task pool and link it to the user story.	
Name: Create Course	
Description:	
Create Cancel	

Confirming the creating of Task Pool

5. Click Create. This creates a Task Pool in Tasifier. Newly created Task Pool is in Planning state and you can start planning and creating task in the Task Pool. Assignees will not see the task in their My Tasks page, nor receive any notification about the new tasks, until the Task Pool is "kicked off". When you have finished planning tasks, click the Kick off button next to the name of the Task Pool. Once you have done that, assignee will see the tasks appear on their My Tasks page. They can then begin working on the tasks. Click here if you want to know more about Task Pool. Click here if you want to know more about creating task.

Conversation Confirmation Scenario Storyboard Design References Tasks Description	
Create Course (Planning) - Kick off	
+ New Task Sort by Priority + Filter + Change -	Q Paste a task ID, or search
When you are planning for a new task pool, the assignee will not be notified until the task pool has	s actually been started.
Please click the (kick off) button next to the task pool name to start it.	
0 planned task	
Design the course creation page I	

Task Pool created

Linking a user story to an existing Task Pool

If there is a Task Pool and you want it to be connected with a user story, you can link the user story to the Task Pool. Note that a Task Pool can be linked by multiple user stories. When a Task Pool is linked by multiple user stories, this means that the tasks created in the Task Pool are to support/ fulfill multiple user stories.

To link a user story to an existing Task Pool:

- 1. In UeXceler, double click to open the user story where you want to manage its development activities.
- 2. Open the **Tasks** tab.
- 3. Click on the button Link toxisting Task Pool.



To link to existing Task Pool

4. In the popup window, click on the drop down menu of Task Pool and select the Task Pool to link to.



Select a Task Pool to link to

5. Click Link to.

Related Resources

- <u>Visual Paradigm on YouTube</u>
- Contact us if you need any help or have any suggestion

Attaching diagram when adding comment

Comment is a message that can be posted to a task in response to the task submitter's initial message, or as a reply to comment(s) posted by other members. When Tasifier is run inside Visual Paradigm, you can attach diagrams when you post a comment. Typically, you post with a diagram when you are asked to provide the diagram, or when the diagram helps explain your comment.

Attaching diagram when adding comment

To post comment with a diagram:

1. Open the details of the task in Task Pane. If the task is inside a Task Pool, open the Task Pool from the Left Pane and select the task from the tasks list. If the task is one of a task assigned to you, find it in the My Tasks page. You can also find from tag, based on their due status, etc.

2. Click on the comment area at the bottom of the Task Pane.

To do	10 > 2015-08-18
Workflow - Library Management System	♥ Ø i≣ :
Design workflow: Borrow Book	
Please provide the process design of the	'borrow book' scenario.
Q -	
Submitted by Stephen.	2015-08-04 09:05
Stephen changed description.	2015-08-04 09:05
ľ	
Post Attach file Attach diagram	Complete
Attach teamwork file	
_	
Follow +	Hide

To post comment

3. Type your comment. If necessary, add supplementary file attachment to your comment by clicking Attach file next to the Post button, and selecting the file to attach. You may attach multiple files to your comment.

Done. Please check.	I	
	Attach diagram amwork file	Complete

Post a comment

4. Click Attach diagram.



Attach a diagram to comment

5. In the Attach Diagram window, select the diagram to attach to the comment and click OK. You can attach multiple diagrams by repeating this and the previous step.

\$	Attach Diagram
	embers can open the diagram directly when they read the task. If you want to focus on a particular region of the gram preview and then adjust the viewport accordingly.
search Diagram Category Model Hierarchy All Types Borrow Book Return Book Process Fine	Preview Queue up
	Select a Teamwork File

If you want people to focus on a specific part of a diagram, after selecting a diagram, click **Crop** below the diagram preview. Then, select the region to focus on and then click **OK** to return.

Click Post or Complete to send out your comment. Followers and assignees of the task will receive a message in their inboxes.

Done. Please check.	
Borrow Book.png (15KB) [Remove]	
Post Attach file Attach diagram Attach teamwork file	Complete

Complete a task

Now, readers who opened the task in Visual Paradigm can click on the image attached to your comment to open it directly, provided the diagram exists in their project. If they click on the filename (e.g. ABC.png), they can save the diagram as image file.

Submitted by Stephen.	2015-08-04 09:05	
Stephen changed description.	2015-08-04 09:05	
Done. Please check.	2015-08-04 09:15	\geq
0		
	ſ.	
Borrow Book.png	4m	
John changed status to completed.	2015-08-04 09:15	
Click here to write a comment		
Follow +	Li	de
Follow +		ue

Open a diagram in comment

Related Resources

6.

- Visual Paradigm on YouTube
- <u>Contact us if you need any help or have any suggestion</u>

Attaching Teamwork Files when adding comment

In Visual Paradigm, you can share project-related artifacts with teammates in the form of Teamwork Files. Teamwork Files are files that are stored along with Visual Paradigm projects. You can make your design reference to these files. You can also keep revisions for these files, and share them within your team. When Tasifier is run inside Visual Paradigm, you can attach Teamwork File(s) when you post a comment. Typically, you post with a Teamwork File when you are asked to provide that file, or when that file helps explains your comment.

Attaching Teamwork Files when adding comment

To post comment with a Teamwork File:

- 1. Open the details of the task in Task Pane. If the task is inside a Task Pool, open the Task Pool from the Left Pane and select the task from the tasks list. If the task is one of a task assigned to you, find it in the My Tasks page. You can also find from tag, based on their due status, etc.
- 2. Click on the comment area at the bottom of the Task Pane.

Betty	10 > 2015-08-18
Create Course - Online Training Center	♥ Ø ﷺ ፤
Implement "Course Creation" pa	ge
Click here to edit	·
Ø -	
Submitted by Stephen.	2015-08-04 09:22
Stephen assigned to John.	2015-08-04 09:22
Stanhan accinnad to Rattu	2015-08-07 00:27
I	
1	
Post - Attach file Attach diagram	n
Attach teamwork file	
Follow +	Hide

To post comment

3. Type your comment.



Type a comment

4. Click Attach teamwork file.



Attach a Teamwork File

5. In the Attach Teamwork File window, select the Teamwork File to attach to the comment and click **OK**. You can attach multiple files by repeating this and the previous step.

\$	Attach Teamwork File	×
Se	ect Teamwork File to attach elect a teamwork file to attach to the task. Team members can download the latest evision of file directly when they read the task.	
	Ref. Material Academics Business Lifecycle LCL-2013-0512.docx LCL-2013-0611.docx LCL-2013-0817.docx LCL-2013-0817.docx Marketing Software	
	OK Cancel	

Select a Teamwork File

6. Click Post or Complete to send out your comment. Followers and assignees of the task will receive a message in their inboxes.

Some references for you
LCL-2013-0817.docx (0B) [Remove]
Post Attach file Attach diagram
Attach teamwork file

Post a comment

Now, readers who opened the task in Visual Paradigm can click on the file link in your comment to download the latest revision of that Teamwork File, provided that the file exists in their project.

Submitted by Stephen.	2015-08-04 09:22	I
Stephen assigned to John.	2015-08-04 09:22	I
Stephen assigned to Betty.	2015-08-04 09:24	I
Some references for you DOCX LCL-2013-0817.docx Click here to write a comment	2015-08-04 09:26	
Follow +	Hide	
Download a Te	amwork File	

Related Resources

Visual Paradigm on YouTube

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Contact us if you need any help or have any suggestion