



APPENDIX **E**

Activities User Interface Reference

An activity is a temporary container within which you define and assign policies. You must create an activity or open an existing activity before you can define policies and assign them to devices.

To create and open activities, and perform other management functions, ensure that Workflow mode is enabled and then select **Tools > Activity Manager**. The Activity Manager window appears. To help you understand the information available and functions you can perform in the Activity Manager window, see [Activity Manager Window, page E-1](#).

If you do not create or open an activity before trying to define policies, a dialog box prompts you to do so. The following topics explain these dialog boxes:

- [Activity Required \(Create Activity\) Dialog Box, page E-17](#)
- [Activity Required \(Create or Open Activity\) Dialog Box, page E-18](#)
- [Openable Activities Dialog Box, page E-19](#)

Activity Manager Window

The Activity Manager window contains three parts: the Activity Table, Activity Details tab, and Activity History tab. These parts allow you to create and manage activities.



Note

The Activity Manager option from the Tools menu is only visible when Workflow mode is enabled.

This section also describes the following features of the Activity Manager window:

- [Activity States](#)
- [Details Tab](#)
- [History Tab](#)
- [Create Activity Dialog Box](#)
- [Submit Activity Dialog Box](#)
- [Approve Activity Dialog Box](#)
- [Reject Activity Dialog Box](#)
- [Discard Activity Dialog Box](#)
- [Validation Dialog Box](#)
- [View Changes \(Activity Change Report\)](#)

Navigation Path

Click the Activity Manager button on the Main toolbar.

Related Topics

- [Working with Activities, page 7-9](#)
- [Understanding Activity States, page 7-5](#)

Field Reference

Table E-1 **Activities Manager Window**

Element	Description
Activity	Contains the unique name of each activity.
State	The state of each activity. For a list of valid states, see Table E-2 .
Last Modified	The timestamp for the most recent action.
User	The username of the person who changed the state of the activity.
Last Action	The most recent action performed on the activity.
Create button	Adds a new activity so that you can create or change policies or assign policies to devices. For more information, see Create Activity Dialog Box, page E-7 .

Table E-1 **Activities Manager Window (continued)**



Element	Description
Open button	Opens the activity so that changes, such as defining and assigning policies, are captured within the activity. You can open an activity when it is in the Edit or the Submitted state.
Close button	Closes and save all changes made while the activity was open. You can close an activity when it is in the Edit Open or the Submit Open state.
Validate button	Validates changes that you have made to the activity from the time you created the activity to the current time, then generates and displays a report. Validating an activity checks policy integrity and deployability. For more information, see Validation Dialog Box, page E-12 .
Submit button	<p>Submits the activity. When using Workflow mode <i>without</i> activity approval, submitting the activity approves and saves it to the database in one step. When using Workflow mode <i>with</i> activity approval, submitting the activity sends notification that the activity is ready for review to the specified approver. For more information, see Submit Activity Dialog Box, page E-8.</p> <p>You can submit an activity when it is in the Edit or the Edit Open state.</p>
Approve button	<p>Saves the proposed changes to the database. Devices associated with the activity are unlocked, meaning they can be included in policy definitions and changes in other activities. You must have appropriate user permissions to approve the activity. You can approve an activity only when it is in the Submitted state. For more information, see Approve Activity Dialog Box, page E-9.</p> <p> Note The Approve button is available only in Workflow mode with an activity approver.</p>

Table E-1 **Activities Manager Window (continued)**

Element	Description
Reject button	<p>Rejects the changes proposed in the activity. You must have appropriate user permissions to reject an activity. If the activity is rejected, the submitter can continue to make changes to the activity. Devices associated with the activity are not unlocked, meaning that they cannot be included in policy definitions or changes in another activity. For more information, see Reject Activity Dialog Box, page E-10.</p> <p>You can reject an activity only when it is in the Submitted or the Submitted Open state.</p> <p> Note The Reject button is available only in Workflow mode with an activity approver.</p>
Discard button	Discards the activity. The activity is then purged from the system when you perform the purge action manually or automatically, as set under Tools > Security Manager Administration > Workflow. The activity state is shown as discarded until the activity is purged from the system. For more information, see Discard Activity Dialog Box, page E-11 and Deployment Page, page A-5 .
View Changes	Generates a report in pdf for any individual activity. If activity is in the Closed state, this button is grayed out. For more information, see View Changes (Activity Change Report), page E-15 .
Refresh button	Refreshes the information presented on the Activity page.
Activity Details tab	Information about the selected activity, such as the name and description of the activity and the date and time it was created and modified. For more information, see Details Tab, page E-5 .
Activity History tab	Transactions that occurred to the selected activity since it was created. For more information, see History Tab, page E-6 .
Close button	Closes the window.
Help button	Opens help for this window.

Activity States

The State column in the Activity Table lists the status of each activity.

Related Topics

- [Understanding Activity States, page 7-5](#)
- [Working with Activities, page 7-9](#)

Field Reference**Table E-2 Activity States**

State	Description
Edit	The activity was created, but the activity is not currently being edited. The activity can be opened or discarded while it is in the Edit state.
Edit Open	The activity is open for editing. Changes, such as defining and assigning policies, are made in the activity. Devices or groups being configured are locked from other activities. The activity can be closed, discarded, submitted, or approved while it is in the Edit Open state.
Submitted	The activity was submitted for review. It can be viewed but not edited while it is in the Submitted state. It must be opened (in the Submitted Open state) to be edited. Devices and groups in the activity are locked from other activities. The activity can be opened, discarded, or rejected while it is in the Submitted state.
Submitted Open	The activity is open for viewing. Devices in the activity are locked to other activities. The activity can be approved or rejected while it is in the Submitted Open state.
Approved	The activity was approved, and the corresponding configuration elements are now committed policy configurations. Devices associated with the activity are unlocked and can now be used by another activity. The activity can be deployed or discarded while it is in the Approved state.
Approve Failed	The activity is placed in the Approve Failed state if errors occur during approval (for example, due to a power failure). If this happens, try to approve the activity again or reboot the server.
Discarded	Changes made to the activity since the activity was created were discarded and further changes to the activity are not allowed. Devices associated with the activity are unlocked and can now be used in a new activity. The activity remains in the Activity table showing a Discarded state until it is purged from the system.

Details Tab

The Details tab provides information about the selected activity.

Navigation Path

Click the Activity Manager button on the Main toolbar, select an activity, then click the Details tab.

Related Topics

- [Activity Manager Window, page E-1](#)
- [History Tab, page E-6](#)

Field Reference**Table E-3** **Details Tab**

Element	Description
Activity ID	Identification number assigned by Security Manager when you create the activity.
Activity Name	Name of the activity. The default activity name contains the username, date, and time the activity was created. However, whoever creates the activity can create a different name for the activity.
Created	Date and time the activity was created.
Last Modified	Date and time the activity was last modified.
Description	Comments entered when the activity state is changed.
Close button	Closes the window.
Help button	Opens help for this window.

History Tab

The History tab displays the transactions that occurred to the selected activity since the activity was created. The History tab provides information about the selected activity.

Navigation Path

Click the Activity Manager button on the Main toolbar, select an activity, then click the History tab.

Related Topics

- [Activity Manager Window, page E-1](#)

- [History Tab, page E-6](#)

Field Reference

Table E-4 **History Tab**

Element	Description
State	State of the activity. For a list of valid states, see Table E-2 .
User	Username of the person who performed the action on the activity.
Date/Time	Date and time the action was performed on the activity.
Comment	Comments entered when the activity state is changed.

Create Activity Dialog Box

Activities must be created before you can make policy changes.

Navigation Path

Click the Create Activity button on the Main toolbar.

Related Topics

- [Opening an Activity, page 7-12](#)
- [Activity States, page E-4](#)

Field Reference

Table E-5 **Create Activity Dialog Box**

Element	Description
Activity Name	Name of the activity. The default activity name contains the username, date, and time the activity was created. If you enter a different name, you should assign a logical name that reflects the contents of the activity. The activity name must be unique.
Comment	Brief description of the changes to the activity or other pertinent information.
OK button	Saves your changes and closes the dialog box.
Cancel button	Closes the dialog box without saving your changes.
Help button	Opens help for this dialog box.

Submit Activity Dialog Box

When in Workflow mode with an activity approver, you must submit activities for approval before policy changes can be committed to the Security Manager database and deployed to devices.

Navigation Path

Do one of the following:

- To submit an open activity, click the Submit Activity button on the Main toolbar.
- To submit a closed activity, click the Activity Management button on the Main toolbar, select the desired activity, then click **Submit**.

Related Topics

- [Opening an Activity, page 7-12](#)
- [Submitting an Activity for Approval, page 7-14](#)
- [Activity States, page E-4](#)

Field Reference

Table E-6 **Submit Activity Dialog Box**


Element	Description
Approver	<p>Default email address of the person assigned approval permissions. This person receives notification of your submission. You can leave the default address or enter a new email address. The default email address is set in Tools > Security Manager Administration > Workflow.</p> <p> Note If the email does not reach the recipient, Security Manager displays a message indicating that the email server is unreachable, and you must contact the approver directly.</p>
Comment	Brief description of the changes included in the activity or other pertinent information.
OK button	Saves your changes and closes the dialog box.

Table E-6 **Submit Activity Dialog Box (continued)**

Element	Description
Cancel button	Closes the dialog box without saving your changes.
Help button	Opens help for this dialog box.

Approve Activity Dialog Box

When in Workflow mode with an activity approver, you must submit activities for review.

Approving an activity commits policy changes to the Security Manager database so that they can then be deployed to devices.

Navigation Path

Do one of the following:

- To approve an open activity, click the Approve Activity button on the Main toolbar.
- To approve a closed activity, click the Activity Management button on the Main toolbar, select the desired activity, then click **Approve**.

Related Topics

- [Approving or Rejecting an Activity, page 7-16](#)
- [Activity States, page E-4](#)

Field Reference

Table E-7 **Approve Activity Dialog Box**

Element	Description
Comment	Brief explanation of why you are approving the activity.
OK button	Saves your changes and closes the dialog box.

Table E-7 *Approve Activity Dialog Box (continued)*

Element	Description
Cancel button	Closes the dialog box without saving your changes.
Help button	Opens help for this dialog box.

Reject Activity Dialog Box

In Workflow mode with an activity approver, you must submit activities to an activity approver who has permissions to approve or reject the activity.

Rejecting an activity does not commit policy changes to the Security Manager database. The activity is returned to the Edit state so that changes can be made. As the activity approver, you can specify any desired changes in the comments field.

Navigation Path

Do one of the following:

- To reject an open activity, click the Reject Activity button on the Main toolbar.
- To reject a closed activity, click the Activity Management button on the Main toolbar, select the desired activity, then click **Reject**.

Related Topics

- [Approving or Rejecting an Activity, page 7-16](#)
- [Activity States, page E-4](#)

Field Reference

Table E-8 *Reject Activity Dialog Box*

Element	Description
Comment	Brief description of why you are rejecting the activity and any suggested revisions.
OK button	Saves your changes and closes the dialog box.

Table E-8 *Reject Activity Dialog Box (continued)*

Element	Description
Cancel button	Closes the dialog box without saving your changes.
Help button	Opens help for this dialog box.

Discard Activity Dialog Box

You can discard an activity if you want to cancel the changes that you have made. For tracking purposes, you can enter a comment explaining why you are discarding the activity.

Navigation Path

Do one of the following:

- To discard an open activity, click the Discard Activity button on the Main toolbar.
- To discard a closed activity (must be in the Edit or Edit Open state), click the Activity Management button on the Main toolbar, select the desired activity, then click **Discard**.

Related Topics

- [Discarding an Activity, page 7-19](#)
- [Activity States, page E-4](#)

Field Reference

Table E-9 *Discard Activity Dialog Box*

Element	Description
Comment	Brief explanation of why you are discarding the activity.
OK button	Saves your changes and closes the dialog box.
Cancel button	Closes the dialog box without saving your changes.
Help button	Opens help for this dialog box.

Validation Dialog Box

The validation process checks the integrity and deployability of policy changes you have made. The process works slightly differently depending on whether Workflow mode is turned disabled or enabled.

- **Workflow mode disabled**—The validation process checks policy changes that took place within a login session and displays the results. The validation process reports on policy changes that were made up until the changes are saved or deployed. After changes are saved or deployed, the validation report remains static; it does not contain any policy changes to the activity after it was saved or deployed.
- **Workflow mode enabled**—The validation process checks policy changes within an open activity and displays a report with the results. The validation process reports on policy changes that were made to the activity until it was submitted. After an activity is submitted, the validation report remains static.

The Validation dialog box contains detailed error information organized in two tabs. Click the desired tab to display its contents.

The following topics contain information about these tabs:

- [Errors Tab, page E-12](#)
- [Devices Tab, page E-14](#)

Errors Tab

The Error tab contains the Validation Results table and Details pane.

The Validation Results table provides details about each error found during validation. The details consist of a description of the error, the severity of the error, and the number of devices affected.

Click an error to display the Details pane. The pane shows a description of and solution to the error and the specific devices affected.

Navigation Path

Do one of the following:

- To display validation errors for an open activity, click the Validate Activity button on the Main toolbar. When the Validation Result dialog box appears, click **Details**, then click the Errors tab.

- To display validation errors for a closed activity, click the Activity Management button on the Main toolbar, select the desired activity, then click **Validate**. When the Validation Result dialog box appears, click **Details**, then click the Errors tab.

Related Topics

- [Validating an Activity, page 7-13](#)
- [Validation Dialog Box, page E-12](#)
- [Devices Tab, page E-14](#)

Field Reference

Table E-10 **Errors Tab**


Element	Description
Validation Results table	List of validation errors.
Error	Error message headline.
Severity	<p>Icon representing the severity of the error:</p> <ul style="list-style-type: none"> • Information icon shows that there are no errors to prevent approval. • Warning icon shows that there are errors; however they are not severe enough to prevent approval. <p></p> <p>Note A validation warning will not prevent activity approval or deployment.</p> <ul style="list-style-type: none"> • Error icon shows that errors prevent approval.
# devices effected	Number of devices affected by the validation error listed in the Error column.
Details pane	Information about the errors and affected devices.
Devices	Name of the device.
Types	Icon representing the type of device, for example firewall, router, and so on.
Error	Error message headline.
Description	Error message details, such as device types affected and current device status.
Solution	Probable cause and suggested resolution when relevant and available.
OK button	Saves your changes and closes the dialog box.

Table E-10 **Errors Tab (continued)**

Element	Description
Cancel button	Closes the dialog box without saving your changes.
Help button	Opens help for this dialog box.

Devices Tab

The Devices tab contains the Validation Results table and Details pane.

The Validation Results table provides details about each device and the errors and warnings found during validation. The details consist of the type of device, the status of the validation, and the number of errors and warnings encountered.

Click a device to display the Details pane. The pane shows a description of and solution to each error and warning.

Navigation Path

Do one of the following:

- To display errors grouped by device for an open activity, click the Validate Activity button on the Main toolbar. When the Validation Result dialog box appears, click **Details**, then click the Devices tab.
- To display errors grouped by device for a closed activity, click the Activity Management button on the Main toolbar, select the desired activity, then click **Validate**. When the Validation Result dialog box appears, click **Details**, then click the Devices tab.

Related Topics

- [Validating an Activity, page 7-13](#)
- [Validation Dialog Box, page E-12](#)
- [Errors Tab, page E-12](#)

Field Reference

Table E-11 **Devices Tab**

Validation Results table —List of devices.	
Type	Icon representing the type of device effected.

Table E-11 **Devices Tab (continued)**

Validation Results table —List of devices.	
Device	Name of the device.
Status	Icon indicating the results of the validation test: <ul style="list-style-type: none"> • Information icon shows there are no errors to prevent approval. • Warning icon shows that there are errors; however, they are not severe enough to prevent approval. • Error icon shows that errors prevent approval.
Summary	Number of errors, warnings, or no text if neither is present.
Details pane —Information about the errors and warnings for the device selected in the Validation Results table.	
Error	Error message headline.
Severity	Icon representing the severity of the error: <ul style="list-style-type: none"> • Information icon indicates there are no errors to prevent approval. • Warning icon indicates there are errors; however they are not severe enough to prevent approval. • Error icon indicates errors prevent approval.
Summary	Brief description of the error.
Description	Details about the error.
Solution	Probable cause and suggested resolution when relevant and available.
OK button	Saves your changes and closes the dialog box.
Cancel button	Closes the dialog box without saving your changes.
Help button	Opens help for this dialog box.

View Changes (Activity Change Report)

From the Tools > Change Reports menu (non-Workflow mode), or Activity Manager (Workflow mode) you can view reports about actions that users have taken within an activity. You can see which actions were taken and what devices and groups were acted upon within an activity or configuration session (non-Workflow mode). The Activity Change report, generated in PDF format,

also identifies the policy changes made as part of that activity. You must disable any popup-blocker applications in your browser for the Activity Change report to launch.

**Note**

If you discover a device or rediscover policies on a device, subsequent policy changes in the same activity performed on that device are not listed in the activity change report. This is also true on a device that you clone from another device.

For more information, see [Understanding Activity Change Reports, page 7-17](#).

Navigation Path

If you are in non-Workflow Mode do the following:

- In Device view, highlight a device and select **Tools > Change Reports**. Select an entry from the Change Report window and click the **View Changes** button.

If you are in Workflow Mode do any one of the following:

- In Device View, highlight a device and select **Activities > View Changes**.
- In Device View, highlight a device and click the **View Changes icon** from the Activity toolbar.
- Highlight an activity in the Activity Manager window and click the **View Changes** button.

Use **File > View Changes** to obtain an Activity Change Report that only reports changes on the current activity (or configuration session in non-Workflow mode).

Related Topics

- [Understanding Activity Change Reports, page 7-17](#)
- [Understanding Activities, page 7-2](#)
- [Working with Activities, page 7-9](#)

Field Reference

Table E-12 Activity Report PDF

Element	Description
Bookmarks tab	Use the PDF bookmarks structure to navigate the report.
Activity name	Name of the activity (or the user and session start date and time if unnamed).
Created by	User and start date and time of activity.
Current state	Current state of activity.
Report created on	Date and time Activity Report generated.
Devices	Devices names acted upon (added, modified, deleted) within this activity. Changes to local policies only will be listed here.
Shared Policies	Changes to all shared policies displayed here.
Policy Objects	Changes to all policy objects displayed here.

Activity Required (Create Activity) Dialog Box

When in Workflow mode, creating or modifying policies requires that an activity be open.

Navigation Path

If you attempt to create or modify policies without first creating an activity, the Activity Required (Create Activity) Dialog Box appears.

Related Topics

- [Creating an Activity, page 7-11](#)
- [Activity States, page E-4](#)

Activity Required (Create or Open Activity) Dialog Box

Field Reference

Table E-13 Activity Required (Create Activity) Dialog Box

Element	Description
Activity Name	Name of the activity. The default activity name contains the username, date, and time the activity was created.
Comment	Brief description of the changes included in the activity or other pertinent information.
OK button	Saves your changes and closes the dialog box.
Cancel button	Closes the dialog box without saving your changes.
Help button	Opens help for this dialog box.

Activity Required (Create or Open Activity) Dialog Box

In Workflow mode, creating or modifying policies requires that an activity be open.

Navigation Path

If you attempt to create or modify policies without first creating or opening an activity, the Activity Required (Create or Open Activity) Dialog Box appears.

Related Topics

- [Creating an Activity, page 7-11](#)
- [Opening an Activity, page 7-12](#)
- [Activity States, page E-4](#)

Field Reference

Table E-14 Activity Required (Create or Open Activity) Dialog Box

Element	Description
Create a new activity	Creates a new activity with the following information: <ul style="list-style-type: none"> Name—Name of the activity. The default activity name contains the username, date, and time the activity was created. Description—Brief description of the changes in the activity or other pertinent information.
Open an existing activity	Opens the activity selected from the Activity list (if there are activities available in the Edit state).
OK button	Saves your changes and closes the dialog box.
Cancel button	Closes the dialog box without saving your changes.
Help button	Opens help for this dialog box.

Openable Activities Dialog Box

In Workflow mode, creating or modifying policies requires that an activity be open.

Navigation Path

Click the Open Activity button on the Main toolbar.

Related Topics

- [Opening an Activity, page 7-12](#)

Field Reference

Table E-15 *Openable Activities Dialog Box*

Element	Description
Activity Name	Name of the activity. The default activity name includes the username, date, and time the activity is created.
State	State of the activity. For a list of valid states, see Table E-2 .
Creator	Username of the person who created the activity.
OK button	Saves your changes and closes the dialog box.
Cancel button	Closes the dialog box without saving your changes.
Help button	Opens help for this dialog box.