Process Analyzer Installation Guide

Release 1.0

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Please take a few moments to read the License Agreement in "Appendix A – Software License Agreement" on page 21. By installing the **Panagon software**, the customer agrees to be bound by the terms of this agreement.

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About This Manual

This manual accompanies Release 1.0 of the Process Analyzer and provides information for workflow and system administrators. This manual is a supplement to the online Help for Process Analyzer Administration and Configuration and the Process Analyzer User Guide.

Conventions Used in the Process Analyzer Documentation

The Process Analyzer documentation uses a few special conventions.

- The form "Alt+T" describes keystrokes done in combination. This means "Hold down the Alt key and press T." Note that the "T" can be uppercase or lowercase, unless otherwise stated. For example, Alt+Shift+T means uppercase T.

- Alt T (no "+" sign) means press the Alt key, release, then press the T key.

- *Italic* type indicates the titles of books or manuals recommended for further information.

- Within a manual, underlined magenta text indicates a hyperlink to another topic within the manual. For example, "Education" on page 7.

- The term eProcess refers collectively to Panagon WorkFlo Services, Panagon Web WorkFlo, and other modules associated with WorkFlo Services or Web WorkFlo.

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Installing the Process Analyzer Engine

This chapter explains how to install and configure the Process Analyzer Engine software. See "Installing the Process Analyzer Client" on page 16 for an explanation of how to install the Process Analyzer Client software.

Process Analyzer Engine Requirements

All Process Analyzer Engine systems must meet the requirements documented in the eProcess Compatibility/Dependency/Hardware Matrix located on the FileNET CSS website at: http://www.css.filenet.com/products.asp?id=974954286&mainFolderID=.

Before you start

1   Verify the following on your Microsoft SQL Server 2000 installation.

- SQL Server is running when the Process Analyzer Engine is installed.

- SQL Server is configured with mixed security.

- The logged-in user has administration rights on the database.

2   Collect the information you will need during the installation process:

- The port number to be used by the Process Analyzer Engine.

- The name of the web server where Web WorkFlo is installed.

- The name of the eProcess router on the web server.

- The username and password used to connect to the router.

Step 1: Install the Process Analyzer Engine software

1   If you aren't already, log on as Windows **Administrato**r.

2   Load the **Process Analyzer** CD-ROM into the CD-ROM drive. Select **Install Process Analyzer Engine** to start the installation process.

3   If you do not have the required software prerequisites installed, a message displays, listing the necessary software. You can restart this process after installing the indicated software.

4   If you do not have JRE 1.4 installed, it installs at this time, as described in steps a—e. Otherwise, skip to step 5.

   a   The Java 2 Runtime Environment - InstallShield Wizard starts. At the Welcome screen, click **Next**.

   b   Accept the license agreement to proceed with the installation.

   c   At the Choose Destination Location screen, choose the destination drive and directory. Click **Next**.

   d   At the Select Browsers screen, modify the selected default browsers, if desired. Click **Next**.

   e   The install process then installs and configures the necessary files. When it completes, it briefly displays a "successful" message, then returns you to the Process Analyzer Engine Installing Java

Runtime Environment screen. Click **Next** to continue with the Process Analyzer Engine installation process.

5 The Welcome screen appears.

6 At the Welcome screen, click **Next**.

7 Accept the Process Analyzer license agreement to proceed with the installation.

8 At the Choose Destination Location screen, choose the destination drive and directory. Click **Next**.

9 Select the port number to be used by the Process Analyzer Engine. FileNET recommends that you enter a value between 5001 and 65536. Click **Next**.

10 The install process then installs and configures the necessary files. When it completes, it displays the Setup Complete screen. It may be necessary to reboot the system to complete the installation. If so, the install process gives you the option to reboot now or later. Click **Finish** to complete the installation.

Step 2: Configure the Process Analyzer Engine

1 Start the Process Analyzer Engine Configuration Tool from the Start menu. In the Server Information section on the General tab, enter the router and user information for the web server. See the instructions for the Process Analyzer Engine Configuration Tool in the Help for Process Analyzer Administration and Configuration for more a detailed description of this required information. Close the Configuration Tool to save your changes.

> **NOTE** You can use the default values for all other information. See the instructions for the Process Analyzer Engine Configuration Tool in the Help for Process Analyzer Administration and Configuration for more information about the remaining configuration options.

2 Before anyone else can use the system, you must grant access to the Process Analyzer database. Use the Microsoft Analysis Manager to create roles and assign users. See the Help for Process Analyzer Administration and Configuration for a sample procedure. See also the online help for the Microsoft Analysis Manager for more information and detailed instructions.

Step 3: Configure eProcess

1 Start the eProcess Task Manager on the workflow server, if necessary.

a Select the WorkFlo Services node in the left panel. Select the Process Analyzer tab in the Properties panel.

b Enter the host name of the **Process Analyzer Engine**.

c Enter the **Process Analyzer Port**. This must match the port you entered when installing the Process Analyzer Engine. If you do not know the port, see "Determining the Process Analyzer Engine port" on page 12.

d Click **Apply**.

2 Start the Configuration Console on the web server. To get to the Configuration Console, click the eProcess button on the left pane of the Panagon Web Services home page (ActiveX Client) or the Tools tab on the Process page (Open Client).

   a Connect to a router that accesses the VWService of the workflow server.

   b Select the VWService node in the left panel. Right-click and select **Properties**.

   c Under the Runtime Options tab, check the **Enable process Analyzer** box.

   d Click **OK**. You must restart the workflow server for the changes to take effect.

Determining the Process Analyzer Engine port

if you do not know the port number used when installing the Process Analyzer Engine, you can find it in the Windows Registry on the Process Analyzer Engine.

1 From the Start menu, select **Run**. In the **Open** field, enter **regedit**.

2 From the Edit menu, select Find. Enter **AEEngine** in the **Find what** field and click the **Find** button.

3 When AEEngine is found, you should see a ServiceParameters value. In the value, the port is indicated by the number following the "-P." (If you don't see the ServiceParameters, continue searching for the next occurrence of AEEngine.)

Step 4: Process the cubes

Before you can process the cubes, events for at least one completed workflow must have been successfully published to the Process Analyzer. (Without a completed workflow, errors occur when you process the Workflow Processing Time and Work Item Processing Time cubes.) If you do not have any workflows in your system that are about to complete in the normal course of events, we recommend that you create, launch, and complete a simple workflow so you can proceed with this step.

To process the cubes, perform the following steps:

1   On the Process Analyzer Engine, start the Microsoft SQL Server Enterprise Manager.

2   Navigate to the Data Transformation Services folder (in the Console Root folder), and select Local Packages.

3   Select ProcessCubes from the list, and right-click. Select Execute Package from the context menu.

4   When the process finishes, click **Done**.

NOTE   The installation process automaticallly schedules this process to be performed nightly. You can modify this as needed for your site. See the Help for Process Analyzer Administration and Configuration for more information. You can view this help system from the Start Menu once the Process Analyzer Engine is installed or from the Process Analyzer Configuration Tool.

Troubleshooting Tips

If events are not subsequently published to the Process Analyzer Engine, please check the following:

- Use the eProcess Task Manager to verify that the **Process Analyzer Engine** and **Process Analyzer Port** are entered correctly on the workflow server.

- Make sure that the **Process Analyzer Port** number entered via the eProcess Task Manager on the workflow server matches with the port number registered in the Process Analyzer Engine Registry. See for further information.

- Make sure that the **Enable Process Analyzer** option is checked in the Configuration Console. To verify that the associated process is actually running, check the event log on the workflow server for a message from process vwaemsg indicating that it has established connection to the Process Analyzer Engine (PA).

- Verify that the Lookup user router URL, User Name, and password entered on the General tab of the Process Analyzer Engine Configuration Tool are valid. Invalid information in these fields causes the VMAE Publishing Service on the Process Analyzer to hang, resulting in no events published.

  - If the web server or router is invalid or mistyped, the VMAE Publishing Service hangs. Error messages eventually appear in the Windows event log on the Process Analyzer Engine indicating that the Process Analyzer could not find the router.

- If the user name or password is invalid or mistyped, the VMAE Publishing Service hangs. Error messages eventually appear in the Windows event log on the Process Analyzer Engine indicating that the user name or password is invalid.

- If your web server name has an underscore in it, you must use its IP address rather than its name when entering the **Lookup user router URL**. If not, the Publish service hangs due to a limitation of JRE 1.4.

If necessary, you can modify these options using the Process Analyzer Engine Configuration Tool. After making changes, you must restart the AEEngine and VMAE Publishing Service processes on the Process Analyzer Engine.

When you modify any option using the Process Analyzer Engine Configuration Tool, you must either press Enter or click the next field for the change to take effect.

- Check the Process Analyzer Engine installation date. Only events generated from the workflows that are launched on or after the Process Analyzer Engine installation date are published to the Process Analyzer Engine.

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Installing the Process Analyzer Client

This chapter explains how to install and configure the Process Analyzer Client software. See "Installing the Process Analyzer Engine" on page 8 for an explanation of how to install the Process Analyzer Engine software.

Process Analyzer Client Requirements

All Process Analyzer Client systems must meet the requirements documented in the eProcess Compatibility/Dependency/Hardware Matrix located on the FileNET CSS website at: http://www.css.filenet.com/products.asp?id=974954286&mainFolderID=.

Step 1: Install the Process Analyzer Client software

The Process Analyzer Client software consists of report samples and templates which have been configured for your specific Process Analyzer Engine.

NOTE   If you are a system administrator, you can choose between two options for installing the Process Analyzer Client software. Your choice should be influenced by the number of client systems and the sophistication of the end users.

- You can install the client software on a network drive or check them into a Content Services library. In this case, use the following procedures to install the reports on one system, then move or check them in as desired. You must then provide your end users with instructions to access the reports and, if necessary, to install Microsoft Pivot Table Services on their local workstations.

- You can have each end user install the client software locally. In this case, each end user should use the following procedures.

The Process Analyzer Client installation process does the following:

- Installs the Process Analyzer Client software.

- Configures the sample reports.

1   Load the **Process Analyzer** CD-ROM into the CD-ROM drive. Select **Install Process Analyzer Client** to start the installation process.

If you do not have the required software prerequisites installed, a message displays, listing the necessary software. You can restart this process after installing the indicated software.

You can install the Microsoft enhanced pivot table support from the **Process Analyzer** CD-ROM. See the instructions in "Installing Pivot Table Services" on page 20.

2 At the Welcome screen, click **Next**.

3 Accept the Process Analyzer license agreement to proceed with the installation.

4 At the Choose Destination Location screen, choose the destination drive and directory. Click **Next**.

5 When all of the files have been installed, the Setup Complete screen displays. To configure the Process Analyzer sample reports at this time, check the box to **Run the Process Analyzer Client Configuration Tool**, and click **Finish**.

NOTE You can configure the Process Analyzer Client later by selecting the Process Analyzer Client Configuration Tool from the Start menu.

Step 2: Configure the Process Analyzer charts

1 If the Process Analyzer Client Configuration Tool is not already started, select it from the Start menu.

2 In the Process Analyzer field, enter the name of the server where the Process Analyzer Engine is installed.

3 In the Report Folder field, enter the location of the top folder containing the sample reports. By default, the folder where you installed the reports displays.

4 Click **Configure**.

The Client Configuration Tool configures all Excel spreadsheets in the selected folder as well as all Excel spreadsheets in all folders one level below the selected folder.

NOTE You cannot successfully configure the sample reports until the Process Analyzer Engine cubes have been processed at least once. If you receive errors when running this procedure, contact your Process Analyzer system administrator or see for further information.

Step 3: View or modify the Process Analyzer charts.

1 Select one of the Chart folders from the Start menu to open an Explorer window displaying the available charts. Select a chart to open in Excel.

2 Once the chart is open, click the Refresh Data icon from the Pivot Table toolbar to display the current and correct data.

3 See the Process Analyzer User Guide for further instructions. You can view this help system from the Start Menu once the Process Analyzer Client is installed

Installing Pivot Table Services

If Microsoft SQL Server 2000 Pivot Table Services is not present on your workstation, you must install it before you can install the Process Analyzer Client.

1 Load the **Process Analyzer** CD-ROM into the CD-ROM drive. Select **Install Pivot Table Services** to start the installation process.

2 At the Welcome screen, click **Next**.

3 The install process installs the necessary files. When the Setup Complete window for Microsoft SQL Server 2000 Pivot Table Services appears, click **Finish**.

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