



Panagon Web WorkFlo Installation Handbook

**Release 5.0.0
September 2002**

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About This Manual

This manual provides information about installing and configuring Panagon Web WorkFlo 5.0.0. It also provides procedures for running a newly installed eProcess system for the first time.

Conventions Used in the eProcess Documentation

The eProcess 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.
- References to Panagon Image Services (IS) documentation are to the release 3.6 and 3.6 SP1 versions of that documentation.
- Within a manual, underlined text indicates a hyperlink to another topic within the manual. For example, [“Education” on page 6.](#)
- The term eProcess refers collectively to Panagon WorkFlo Services, Panagon Web WorkFlo, and other modules associated with WorkFlo Services or Web WorkFlo.

- Certain product names are abbreviated as shown below.
 - Designer, for eProcess Designer
 - Administrator, for eProcess Administrator
 - Tracker, for eProcess Tracker
 - Configuration Console, for eProcess Configuration Console
 - Personal Work Manager, or Manager, for eProcess Personal Work Manager
 - Image Services or IS, for Panagon Image Services
 - Content Services or CS, for Panagon Content Services

Education

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Installing Panagon Web WorkFlo Software

Install Panagon Web WorkFlo on a web server running Panagon Web Services/ActiveX Client to provide eProcess functionality for Web Services users.

Before Installing Panagon Web WorkFlo

Prior to beginning the installation, we recommend that you address the following topics:

All web servers must meet the hardware, software, and applicable configuration requirements documented in the eProcess Compatibility/Dependency/Hardware Matrix. The current matrix is located at:

<http://www.css.filenet.com/products.asp?id=974954286&mainFolderID=1000157883>.

In addition, to meet the requirements in the matrix:

- You must install required patches or *SS fixes for Panagon Web Services and Web WorkFlo. These patches do not need to be installed prior to installation of Web Services or Web WorkFlo, but should be installed before running the system.

To determine whether any additional patches or *SS fixes are needed, contact the FileNET REsponse Center (FRC) or see the FileNET CSS website at <http://www.css.filenet.com>.

- A web server domain name can have a maximum of 128 characters and should only contain ASCII alpha-numeric characters and

hyphens. The use of non-alphanumeric or underscore characters is not recommended.

- Install and configure a workflow server prior to installing the web server. See the *Panagon WorkFlo Services Installation Handbook* based on your workflow platform:
 - WorkFlo_Svcs_Windows_install.pdf
 - WorkFlo_Svcs_UNIX_install.pdf

These documents are located on FileNET's CSS website: <http://www.css.filenet.com>.

- Panagon Web WorkFlo requires a prior installation of the Panagon Web Services release.
- After installing Panagon Web Services, use the Configure program to add any CS and IS libraries you will use in conjunction with eProcess. Refer to the IDM Web Services Administrator's Help for instructions on how to install and configure Panagon Web Services.

Installing and Configuring Web Servers

Installation of a web server assumes you have met the web server prerequisites defined in [“Before Installing Panagon Web WorkFlo” on page 8.](#)

An eProcess system must include one web server and can optionally include multiple web servers.

To install the developer files on a workstation where you will develop step processors and other applications that interface with an eProcess system, refer to [Chapter , “Appendix B– Installing the Toolkit,” on page 28.](#)

You cannot install Web WorkFlo on the same server with Content Services (CS) or WorkFlo Services.

- 1 Load the *Panagon Web WorkFlo and Toolkit CD*.
- 2 Click on *Install Panagon Web WorkFlo <release number>*.
- 3 Setup begins. Click Next on the Welcome screen.
- 4 Click Yes and then Next to install the appropriate version of the Java Runtime Environment (JRE).
- 5 Click Next to install the Panagon Web WorkFlo files. Click Yes to the Software License Agreement.

Setup installs the Panagon Web WorkFlo files in the same directories where Panagon Web Services is installed.

- 6 You may be prompted to reboot the server. Click **Finish** at the end of setup.

Proceed to [Chapter 2, “Running eProcess for the First Time,” on page 12.](#)

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Running eProcess for the First Time

After completing the installation and configuration procedures for the workflow server and web server, follow the procedures in this chapter to run your system for the first time and verify that your eProcess system is installed and configured correctly. These procedures include instructions for defining two workflow users (a participant and an administrator), starting the necessary software, initializing an isolated region, and defining and testing a simple workflow.

Throughout this chapter, there are references to eProcess Help. You can access the eProcess Help from the Help button in the left panel of the eProcess home page.

Define Workflow Users

Users who will create workflow definitions, launch or participate in workflows, or monitor and manage workflows must have access to both the Image Services and Content Services security systems. Use the following procedures to define two users:

- a workflow participant, who will receive and process work assignments, and might author and launch workflows.
- a workflow administrator, who will monitor the business processes, and possibly resolve technical and process problems.

Note We recommend that the usernames and passwords be identical (including case) in both the IS and CS security systems to minimize the number of times that workflow users need to log on. If the usernames and passwords are not identical, users will be prompted to log on when they access the eProcess system as well as a CS or IS library.

Add users to the IS Security system

On the workflow server, take the following steps to add both the workflow participant and the workflow administrator in the IS security system.

- 1 Access the eProcess Task Manager.
 - a Verify that the WorkFlo Services node is selected.
 - b On the Action drop-down menu, select Security Administration.
- 2 Log on as the Image Services system administrator.
- 3 On the **Applications** menu, select **Security Administration**
- 4 On the Security Administration **Users** menu, select **Add User**.
- 5 In the name field, specify a username for a workflow participant.

If you have an existing CS system, you can optionally duplicate a CS username here. Otherwise, specify any name, then create the same user on the CS system.

If the workflow server is on an existing Image Services system, you can optionally use an existing username and duplicate that user on the CS system.

In the Add User dialog, complete the following fields:

Administrative group: **Operator**

Primary group: **Operator**

Password: <specify a password (match your CS account if you wish)
or choose No password>

- 6 Click **Save**, then click **Next** to add another user.
- 7 In the name field, specify a username for an administrative user.
- 8 On the Add User dialog:

Administrative group: **SysAdminG**

Primary group: **SysAdminG**

Password: <specify a password >

For this example, the administrative user is performing both system administration tasks and configuration tasks. For a production system, you might define other users, such as workflow authors, users who perform configuration tasks, and various participants. See “Defining Users and Groups” in *Help for eProcess Administrators* for additional information on eProcess security requirements.

Add users in the CS security system

On the CS system, or where the CS Explorer is installed, use the following procedure to add the same two users you added in the previous section.

- 1 From the **Start** menu, select the following:

FileNET Panagon IDM
IDM Content Services Explorer

- 2 Log on to the IDM CS Explorer as an administrative user.

- 3 Right-click on **Users**, and select **New User**.

- a Select the **Properties** tab.

Add user name (the same name as the workflow participant you added on the workflow server).

Set Add items: **yes** (to allow the user to save a workflow definition or other document on the CS system, and to launch a workflow).

- b Select the **Group membership** tab.

Choose **General users**

- c Select the **Access List** tab:

Choose **General Users**.

Select either **Author** or **Owner** to add to the dialog box on the right side. Either choice allows the user to access his document.

- 4 Repeat the steps above to add a workflow administrator user. This user must have group membership in Administrators.

Start the PPM and Router

To enable eProcess activity, the Pooled Process Manager (PPM) must be running on the workflow server and a router must be running on each web server.

PPM

The Pooled Process Manager (PPM) is a link between the router and the VWJs server process.

On the **workflow server**, take the following steps to start the PPM:

- 1 From the **Start** menu > **Programs**, select **FileNET Panagon WorkFlo Services > eProcess Task Manager**.
- 2 Task Manager defaults to the WorkFlo Services node when it is initiated. Select the **PPM** node.
- 3 Click the Start icon on the Task Manager toolbar.
- 4 When the message says "Starting PPM", the Start button is disabled.

For additional information about the PPM, including alternative start methods and configuration options, see *Managing the Pooled Process Manager (PPM)* in *Help for Task Manager*.

Router

A router is a process that enables communication between a web server and a workflow server. Each web server runs one or more routers; each router corresponds to one isolated region.

On the **web server**, take the following steps to start a router:

- 1 From the **Start** menu > **Programs**, select **FileNET Panagon WorkFlo Services > eProcess Task Manager**.
- 2 Task Manager defaults to the **Routers** node.
- 3 Configure a router before proceeding. Refer to Managing routers in *Help for Task Manager* to configure a router.
- 4 Select the router under the Routers node that you want to start; click the Start icon on the Task Manager toolbar to start the router.
or
Select the router in the right-hand window that you want to start; select **Start** from the Action drop-down menu to start the router.
- 5 Click the Start icon on the Task Manager toolbar after selecting the router name.

Accept the default parameters, unless your web server or workflow server resides behind a firewall or Network Address Translator (NAT). Refer to Managing routers in *Help for Task Manager* for details and a description of each parameter.

For additional information about the router, including alternative start methods and configuration options, see Managing routers in *Help for Task Manager*.

Initialize the isolated region

Initialize an isolated region to create the data structures necessary to process workflows in that region. Initializing an isolated region creates Default Roster, Inbox, Tracker, and Default Event log.

- 1 On a client computer** (not the web server), start Internet Explorer. The client computer must meet the requirements outlined on this web site:

See the eProcess Compatibility/Dependency/Hardware Matrix for supported software levels for Panagon WorkFlo Services and Web WorkFlo. The current matrix is located at: <http://www.css.filenet.com/products.asp?id=974954286&mainFolderID=1000157883>.

- 2** In the Address line, enter

`http://<web server name>/idmws`

where <web server name> is the web server where you installed Panagon Web WorkFlo.

- 3** If the client computer has not previously accessed the web server, follow the prompts to install the FileNET Panagon Web Services ActiveX components. Once the ActiveX components are installed, the appropriate JRE version is automatically installed and the pw.jar file is downloaded to the client when needed.
- 4** When the Panagon Web Services home page displays, check that the libraries you configured are listed in the left pane.
- 5** Click the **eProcess** button in the left pane.

- 6 Click **Configuration Console**.
The logon dialog box appears.
- 7 Log on as the system administrator.
- 8 On the Configuration Console window, click **vwrouter [<isolated region #>]**.
- 9 Click **Action**, then choose **Connect**.
- 10 With **vwrouter [<isolated region #>]** selected, click **Action**, then choose **Initialize Isolated Region**.

(Note that this command deletes all information in the specified isolated region.)

- 11 When the initialization process is complete, click **User Queues** and confirm that Inbox and Tracker queues exist.
- 12 From the **File** menu, choose **Exit**.

For information about creating additional queues, rosters, event logs, and managing isolated regions, see the online Help for Configuration Console.

Create a test workflow

Use the following steps to create a one-step workflow you can use to validate your configuration.

- 1 On the client computer, on left pane of the eProcess home page, click **Designer**. (If necessary, click the **eProcess** button to make the **Designer** button visible.)
- 2 At the logon prompt, log on as the workflow participant you defined.
- 3 On the main Designer toolbar, click **Workflow Properties**. Under WorkFlow Name, type **Test**. Under Subject, type **Test workflow**. Close the dialog.
- 4 To create a step:
 - a On the main Designer toolbar, click **Create General Step**, then click anywhere in the map area to place the step.
 - b In the Properties pane (right side of the window), change the step name (Step 1) to **Test step**.
 - c In the Instructions field, type **Congratulate yourself!**.
- 5 For this configuration test, assign yourself as the participant for this Test step as follows:
 - a In the Properties pane, check that **Participants** is selected, then click the **Add** button.
 - b On the Participants dialog, click **Users**, then select the workflow participant you defined (the user name you used to log on) and move that name to the right column, using the right arrow button.

- 6 To specify a route from the Launch step to Test step:

On the workflow map, point to the edge of the **LaunchStep** until the cursor changes to a route cursor. Press and hold the mouse button and drag to the **Test step**. The route displays as a red arrow from the Launch step to the Test step.

- 7 Validate your workflow to verify that it has no errors.

- 8 Save the new workflow definition to the CS server and launch the workflow as follows:

- a On the **File** menu, select **Launch**.
- b On the **Save a workflow definition to Content Services** dialog box, under Document Name, enter a filename for the workflow definition.
The system will append the extension .pep (Panagon eProcess).
- c Click **Browse**, then locate a folder in your CS library.
- d With the selected folder open, click **Save**, then click **Next**.
- e Enter a title string, such as **First Test Workflow**, that will appear in the CS library as the document title. Click **Next**.
- f Give other users access to your workflow definition, if you wish. Do this as follows:
 - Select a user or group from the first drop-down list in the lower portion of the screen.
 - Select an access level from the second drop-down list.
 - Click the Add button.
- g Click **Finish**. The Launch page displays.

- 9 On the Launch page, click **Launch** to start the workflow, sending the Test step to the assigned participant (you).
- 10 Exit Designer. Choose Cancel previous checkout.
- 11 Use Personal Work Manager to locate the work (Test Step) assigned to you as follows:
 - a On the eProcess home page, click **Manager**. (You are already logged on, so there is no logon prompt.)
 - b Click on the folder with your user name, then open the **Inbox** to display the items in your workflow inbox.
 - c Double-click the **Test workflow** item to open it.
 - d Check the Instructions.
 - e Click **Complete** to complete the step and end the workflow.

You have now run your first workflow. If you had problems, see the *Help for eProcess Administrators* for problem solving information.

Complete Additional Configuration

After your system is installed and running, finish preparation for general use by defining the necessary users and groups, creating additional isolated regions, and enabling optional functionality such as email notification and automatic workflow launch. Additional configuration is also required if your system uses firewalls, web farms, or a cluster server.

For details, see the “Configuration” section of the *Help for eProcess Administrators*.

Back Up the System

When the installation and configuration of the system is complete, back up the workflow servers and web servers.

On the workflow server, see the *Help for eProcess Administrators* by pointing your browser to <drive>:\fnsw\Lib\WF_Help\admin_hb.htm (<drive> is the drive where you installed the Panagon WorkFlo Services executables). See the “Backup & Restore” section for details.

See vendor-specific information for backups on web servers.

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Appendix B– Installing the Toolkit

Panagon Web WorkFlo and WorkFlo Services ships with a development toolkit; the Panagon eProcess Toolkit consists of development documentation, samples, and reference documentation for both the eProcess APIs and the Java UI Toolkit APIs.

Install the toolkit development files on a Solaris or Windows Web WorkFlo server or Workflo server by performing the following steps:

- 1** Insert the *Panagon Web WorkFlo and Toolkit CD* into the CD-ROM drive on your development system.
- 2** On the CD, locate the **\Developer Files** folder.
- 3** Copy the **\Developer Files** folder, and all the sub-directories, to your local drive. Maintain the relative directory structure of the directories.

While no location requirements exist for the toolkit you should copy the directory structure to the root directory on your development system. Adding the directory to the root speeds up compile time for Java applications, makes registering files easier, and makes finding the appropriate reference documentation much easier.

- 4** Change the file attributes for all of the files in the newly created directory structure from Read-only to Read/Write.

-
- 5 If you have not already done so, install the Sun Microsystems Java Software Development Kit (SDK).

See the eProcess Compatibility/Dependency/Hardware Matrix for the correct version. The current matrix is located at:

<http://www.css.filenet.com/products.asp?id=974954286&mainFolderID=1000157883>.

- 6 Additional configuration is required before you can begin application development. For instructions, see the following topics in the *Panagon eProcess Developer's Guide*:

- Configure the Java SDK
- Configure the COM Bridge

Also see these topics prior to developing applications:

- Panagon eProcess Toolkit - Installation and Contents
- Select Task and Languages.

The Developer's Guide is available on the FileNET CSS website at <http://www.css.filenet.com>.