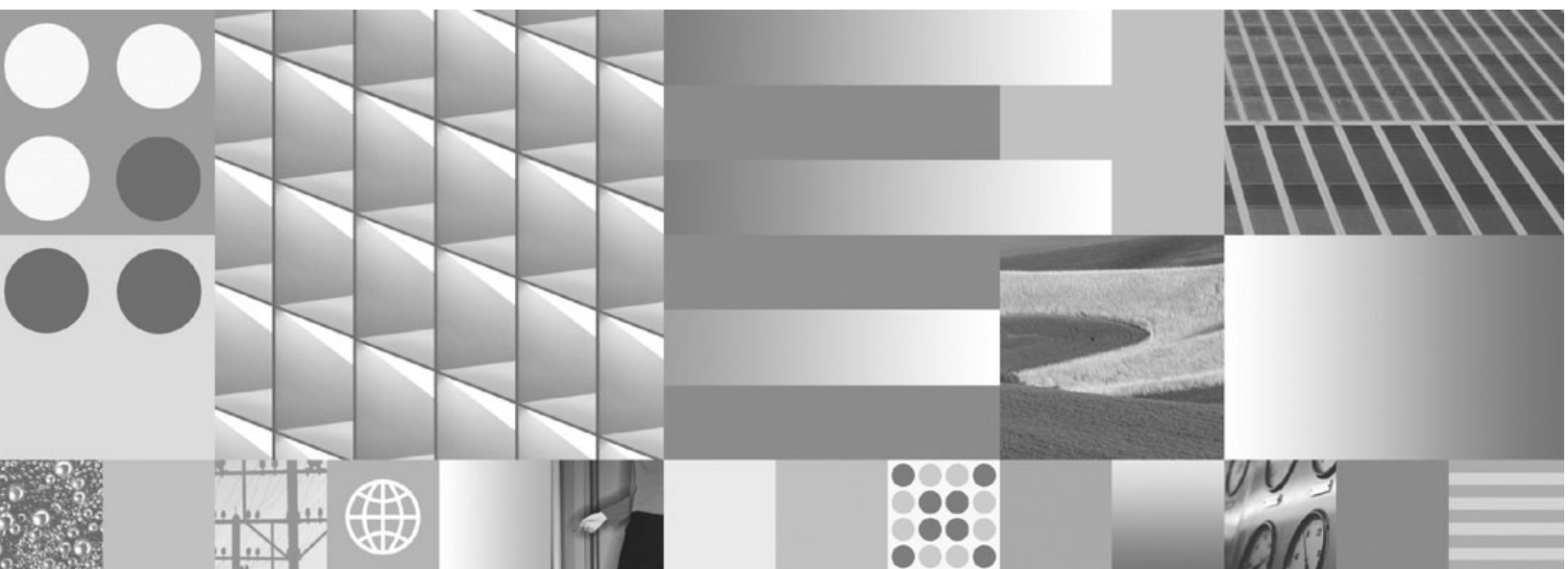


Installation and Upgrade Guide



Installation and Upgrade Guide

Note

Before using this information and the product it supports, read the information in “Notices” on page 3.

This edition applies to version 3.5.4 of IBM FileNet Image Manager Process Analyzer (product number 5724-R76) and to all subsequent releases and modifications until otherwise indicated in new editions.

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Typographical Conventions

This document uses the conventions in the following table to distinguish elements of text.

Convention	Usage
UPPERCASE	Environment variables, status codes, utility names.
Bold	Program names and selected terms such as command parameters or environment variables that require emphasis.
Bold Gray	Clickable user-interface elements (such as buttons).
Bold Olive	Paths and file names.
<i>Italic</i>	User-supplied variables and new terms introduced in text, names of additional documents (such as <i>FileNet P8 Platform Installation and Upgrade Guide</i>).
< <i>italic</i> >	User-supplied variables that replace everything between and including the angle bracket delimiters (< and >).
Monospace	Code samples, examples, display text, and error messages.

NOTE Some path names in this document that are identical (except for the directory-separator character) on both UNIX® and Windows® platforms are specified in UNIX syntax only (that is, with forward-slash directory separators).

WARNING This document contains examples of text to be typed on a command line. Be sure to manually type the command, rather than copying and pasting it from this document. Otherwise, your command line may contain unrecognized characters and will not execute properly.

Revision Log

The following table identifies changes made to this document since the IBM® FileNet® Image Manager Process Analyzer 3.5.4 release.

Date	Revision
05/08[GC31-5574-02]	<p>Image Manager Process Analyzer 3.5.5 release.</p> <p>Added section “Access IBM FileNet Documentation, Compatibility Matrices, and Fix Packs” on page 10.</p> <p>Updated user requirements in “Security” on page 13.</p> <p>Added support for MS SQL Server 2005 in “To install and configure Microsoft SQL Server 2005” on page 19, in “To install SQL Server Client 2005” on page 21, and throughout the document.</p> <p>Added upgrade task “(Optional) Upgrade MS SQL Server 2000 to version 2005.” on page 43.</p> <p>Added section “Encrypt Passwords for Silent Installations and Upgrades” on page 48.</p>
03/08[GC31-5574-01]	Updated back cover information.
01/08[GC31-5574-00]	Initial release.

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About this Document

Installation by a FileNet Certified Professional (FCP) Recommended. For more information on the FCP program, contact your IBM service representative.

Every effort has been made to provide you with complete installation instructions. If information becomes available after the creation of the documentation release from which you accessed this guide, we will provide an updated version of the guide. To download this guide from the IBM support page, see [“Access IBM FileNet Documentation, Compatibility Matrices, and Fix Packs” on page 10](#).

Send your comments by e-mail to comments@us.ibm.com. Be sure to include the name of the product, the version number of the product, and the name and part number of the book (if applicable). If you are commenting on specific text, include the location of the text (for example, a chapter and section title, a table number, a page number, or a help topic title).

NOTE This guide provides instructions for installing and/or upgrading the IBM FileNet Image Manager Process Analyzer to its current released version. Be aware that each release of a IBM FileNet component or expansion product may have multiple service packs, fix packs or interim fixes available for installation, each with potentially different dependencies and installation requirements. Therefore, before you attempt to install or upgrade Image Manager Process Analyzer, review the list of releases and their associated dependencies in the *eProcessCompatibilityDependencyHardware.xls* document on the IBM support page (www.ibm.com/software/data/support/). See [“Access IBM FileNet Documentation, Compatibility Matrices, and Fix Packs” on page 10](#).

Installation Planning and Procedures

This installation section contains the following major topics:

- [“Installation Planning Considerations” on page 10](#)
- [Task 1 “Install Image Manager Process Analyzer 3.5.5 Documentation” on page 16](#)
- [Task 2 “Install Microsoft SQL Server” on page 18](#)
- [Task 3 “Install MS SQL Server Client software” on page 22](#)
- [Task 4 “Install Process Analyzer Engine” on page 24](#)
- [Task 5 “Install Process Analyzer Client” on page 32](#)

Installation Planning Considerations

This section lists details that will help you prepare your environment for the installation of IM Process Analyzer. In many cases, the items you see listed will be links to more detailed information that will help you plan a system rollout. Review this information thoroughly before you start to set up FileNet components or required third-party software.

Access IBM FileNet Documentation, Compatibility Matrices, and Fix Packs

To access documentation for IBM FileNet products

1. Access the [Product Documentation for FileNet P8 Platform](http://www.ibm.com/support/docview.wss?rs=3247&uid=swg27010422) support page (www.ibm.com/support/docview.wss?rs=3247&uid=swg27010422).
2. Select the appropriate product link.

To access compatibility matrices and fix packs for IBM FileNet products

1. Access the [Fix Packs for FileNet P8 Platform](http://www.ibm.com/support/docview.wss?&uid=swg27010146) support page (www.ibm.com/support/docview.wss?&uid=swg27010146).
2. From the Fix Pack page:
 - To access the compatibility matrix, under FileNet P8 Compatibility Matrices, click **Matrix**.
 - To access the fix pack you need, under a specific product name, click the release number.

Gather required documentation

Before you begin installing the software, retrieve the following documents.

NOTE For general instructions on how to navigate to this and other IBM FileNet product documentation on the IBM web site, see [“Access IBM FileNet Documentation, Compatibility Matrices, and Fix Packs”](#) on page 10.

- *eProcess Release Notes*. This document provides details on new features, known issues, and resolved problems.
- *eProcessCompatibilityDependencyHardware.xls*. This document provides details for all the eProcess and IM Process Analyzer components, as well as the minimum supported levels of third-party software components. The information throughout the *IBM FileNet IM Process Analyzer Installation and Upgrade Guide* assumes you have met all applicable requirements listed in that document.

NOTE To access this document, follow the instructions above, and navigate to the *Hardware/Software Requirements for FileNet Products* page from the Product Support page.

- *FileNet P8 Platform 2.0.1x Troubleshooting Guide (includes eProcess 5.1.0)*. This document provides troubleshooting information on all aspects of the product.

Software Requirements

Active Directory

(If you are using Active Directory) The Microsoft® SQL Server must be in the same Active Directory forest as the PA server.

Server Time Synchronization

- The Process Analyzer Engine, Process Analyzer database, and eProcess server must be in the same time zone and synchronized to the same time.

Ports

Ensure that you have the required static TCP/IP port numbers for each IM Process Analyzer instance. By default the PA needs the following ports:

- Database Port: IM Process Analyzer requires a dedicated MS SQL Server instance with a static TCP/IP port number. The port number must be specified during both MS SQL Server installation and IM Process Analyzer installation.
- Data Port: 32772
- Registry Port: 32771

Database

- The PA setup program automatically creates the following two databases.
 - The PA database (VMAEDM).
 - The OLAP database (VMAE).

NOTE If PA is configured with a named database instance, the name of the OLAP database is VMAE_<database_instance_name>. For example, if the database instance name is “inst1,” the OLAP database name is VMAE_inst1.

- Ensure that IM Process Analyzer database files are on an NTFS-formatted drive.

The IM Process Analyzer database files can grow large over time. To allow the file sizes to grow beyond 4GB, the database file must be located on a drive that is formatted as NTFS.

- You can use a local or remote database for IM Process Analyzer.

The database engine is local if it is installed on the same server that you install the Process Analyzer Engine software. The database is remote if it is on a separate server from IM Process Analyzer.

- For performance reasons IBM does not recommend collocating the PE and IM Process Analyzer databases.

IM Process Analyzer

- The typical use case for IM Process Analyzer is for analyzing data from a production system.

Security

Users required for MS SQL installation

To install MS SQL Server, you need a local user with administrator privileges on the computer where the database will be installed. [Jlshak: On p. 12, the sql user for the 3.5.4 must be the sa account. We can't use a custom user like we do with f_pa on 4.0.]

Users required for IM Process Analyzer installation

Create or identify the following user:

<Process Analyzer Installer>

This Windows user must be created as:

- An administrative user on the local computer where Process Analyzer Engine will be installed.
- (If remote database) An administrative user on the computer where Process Analyzer database will be located (MS SQL machine). Domain account required.
- A member of the OLAP Administrator group.

NOTE The OLAP Administrator group assignment will take place during MS SQL installation. See “Verify that the <PA Installer> user has been given administrative privileges on the Online Transaction Analysis Processing (OLAP) database.” on page 21.

Users required at runtime

[CT: What happened to the <PA DB Administrator> user? Look at PA 352 Hassi: That user was not included in the IM PA 354 IUG.]

Create or identify the following users:

- *<Process Analyzer Administrator>*

This user must be created as:

- A Windows user who has write access on the local computer (where the Process Analyzer Engine will be installed)
- A Windows user and a SQL database user who is able to act in the following server roles on the SQL Server VMAEDM database:
 - db_owner
 - ddl_admin
 - Bulk Insert Administrators
- A Windows user who is a member of the OLAP Administrator group.

NOTE The VMAEDM and OLAP databases are created by the PA installer in “Install Process Analyzer Engine” on page 24.

- *<Process Analyzer Client Database User>*

The Windows user who will log on to the Process Analyzer Client server must have permission to access the OLAP cubes on the database server for the client to be able to connect to the PA database.

For more information, see [“Configure the Process Analyzer Client.” on page 35.](#)

Depending on how your environment is set up, either of the following scenarios could apply:

- The database server and Process Analyzer Client server belong to the same LDAP domain; give the domain user or group access to the OLAP cubes on the database server.
- The database server and Process Analyzer Client server do not belong to the same domain; create a duplicate of the client user on the database server, and give the user access to the OLAP cubes.

CAUTION When you create the duplicate user, create a user with the same user name and password as is used for the Windows logon to the PA server.

For more information on how to configure the *<Process Analyzer Client Database User>*, see [“To grant access rights in Microsoft Analysis Manager \[Hassi: Added per Anita, 111307.\]” on page 32.](#)

Prerequisite Tasks

Follow the installation or upgrade tasks provided in this manual to either install a new Image Manager Process Analyzer 3.5.5 system, or upgrade an existing 3.5.4 system to version 3.5.5.

To set up and configure prerequisite software for IM Process Analyzer

1. Install and configure IBM FileNet Image Manager Process Engine. See the *IBM FileNet Image Manager Process Installation Guide* for instructions.
2. Create or identify the users required for installation. For information, see [“Users required for MS SQL installation” on page 13](#), [“Users required for IM Process Analyzer installation” on page 13](#), and [“Users required at runtime” on page 13](#).

Task 1: Install Image Manager Process Analyzer 3.5.5 Documentation

This topic covers the installation of your Image Manager Process Analyzer 3.5.5 Documentation Java-enabled application server.

NOTES

- Because the Image Manager Process Analyzer 3.5.5 Documentation includes a Java-based full-text search engine, it must be run as a web-based application.
- To ensure proper documentation search functionality, make sure that JavaScript support is enabled on each user's browser client.

To install Image Manager Process Analyzer 3.5.5 documentation

1. Access the **eProcess 5.2.0 documentation** package. [Hassi: It is currently unclear how the PA 355 documentation will be delivered, if it will be an update of certain files only, or a full build.]
2. Copy the **/padocs/** folder structure from the package to a location on the local hard drive.
3. Deploy or install the **/padocs/** folder and its content as a web application, per the instructions provided with your application server.

NOTE If you prefer to deploy the help system as a WAR file you must first create a WAR file of the the **/padocs/** package. Before releasing the documentation to a production system you should verify that all functionality such as navigation and search work as expected after you deploy the help.

4. Verify that you can access the online help:

From your web browser, access the following URL:

```
http://<docserver>:<port#>/<pa_docs>/_start_here.htm
```

where:

docserver is the name of the web server.

port# is the web server's port number.

pa_docs is the name of the deployed web application.

NOTE The Image Manager Process Analyzer Engine 3.5.5 Setup program you will run in subsequent procedures within this manual will prompt you to enter the Documentation Server URL.

5. Update the Documentation Search Index [Hassi: This will probably not be required for this release... We will ship a correctly configured index.]

NOTE Any time you update the documentation search index, a backup of the files in the existing **Index/core** directory will be automatically copied to the **Index/IndexOld** subdirectory. You can reapply these backed-up files to the **core** subdirectory (after first removing the new files created there) if you need to return to your previous indexed state.

To update the documentation search index

- a. Make sure the web application server where you deployed the Image Manager Process Analyzer documentation application is stopped.
- b. Open a command prompt or terminal on the application server.
- c. From the command line, navigate to the **search** subdirectory under the application root directory, for example, **padocs**.
- d. Using a text editor, open the search-indexing script file that is appropriate to your operating system:

NOTE You may need to set the permissions on this file, as it is set to read-only in the documentation package.

(UNIX) **indexFiles.sh**

(Windows) **indexFiles.bat**

- e. If necessary, set the JAVA_HOME variable in the script file with the path to your JRE installation. The default examples are:

(UNIX) `JAVA_HOME="/usr/java/j2sdk1.4.1_02"`

(Windows) `SET JAVA_HOME=c:\j2sdk1.4.2`

NOTE The Java JRE installation subdirectory can be user-defined, so substitute your actual location, as appropriate.

- f. Save your changes and close the text editor.

NOTE If you intend to run the search indexer on a UNIX application server, ensure that you add execute permissions (chmod 755) to the **indexFiles.sh** file.

- g. Run the following updated search-indexing script file that is appropriate to your operating system.

(UNIX) **indexFiles.sh**

(Windows) **indexFiles.bat**

NOTE As you run the search-indexing script, you may notice periodic Parse Abort errors. You can ignore these error conditions, as they are benign and do not affect the overall indexing process.

Task 2: Install Microsoft SQL Server

This task uses third-party software. Be sure to read all pertinent documentation from the third-party software vendor. Contact your system/network/database administrator with third-party vendor or environment questions before you continue.

Depending on your configuration, complete either of the following procedures:

- [“To install and configure Microsoft SQL Server 2000” on page 18](#)
- [“To install and configure Microsoft SQL Server 2005” on page 20](#)

NOTES

- Configure the MS SQL Server database for Mixed Mode authentication.
- The PA setup program automatically creates the PA database. No manual steps are required.
- During the MS SQL Server installation, record the values for the following settings. You will use this information during PA Engine installation in [“\(Remote Database\) Specify the Database Configuration Parameters” on page 26](#) or [“\(Local Database\) Specify the Database Configuration Parameters” on page 26](#).
 - Server name.
 - Instance name.
 - Static TCP/IP port assigned to the database instance. See [“Ports” on page 11](#).
 - Name and password of the <PA DB Administrator> user that PA will use to access the database. See [“Users required at runtime” on page 13](#).

To install and configure Microsoft SQL Server 2000

In addition to the following instructions, refer to Microsoft’s SQL Server 2000 installation instructions.

1. Log on as a local user with administrator privileges on the computer where the database will be installed. See [“Users required for MS SQL installation” on page 13](#).
2. Create a database instance for use by PA software, or verify that such an instance already exists.

Use the Instance name you decided on in [“Instance name.” on page 18](#).

3. Verify a Custom Microsoft SQL Server installation.
4. On the Services Accounts dialog box, choose **Use the same account**. Under Service Setting, choose **Use the Local System account**.
5. Verify that the authentication is set to **Mixed Mode**.
6. Provide an sa password for your site.

7. Select one of the following database collations:

- **Dictionary order, case-insensitive, for use with 1252 Character Set** (or any case-insensitive SQL Server collation). Case-insensitive collation is the Microsoft default and the setting most used in FileNet P8 environments (because it offers search results without regard to character case).
- **Dictionary order, case-sensitive, for use with 1252 Character Set** (or any case-sensitive SQL Server collation). Select case-sensitive SQL Server collation only if you are sure your site requires (and will continue to require) searches that must differentiate upper-case from lower-case characters (in property choice lists, folder names, and so on.).

CAUTION Select your SQL Server collation setting carefully. Switching collation settings after installation can be difficult and time-consuming, especially if you want to switch from case-sensitive to case-insensitive collation after significant user activity. Also, be aware that if you have a case-sensitive database and you want to perform a case-insensitive search programmatically or otherwise, you will likely encounter serious performance degradation on SQL Server because the database cannot use column indexes in these cases.

8. Define a static port number.

See [“Ports” on page 11](#).

NOTE If the PA database instance is the only instance on the server, you can accept port 1433 (default value) in the TCP/IP port number box. Otherwise, you must assign a non-conflicting static port number for the PA database instance.

9. Install Microsoft SQL Server 2000 Analysis Services add-on.

FileNet PA does not require any specific configuration settings when you install Microsoft SQL Server 2000 Analysis Services. Refer to Microsoft’s SQL Server 2000 installation instructions.

CAUTION If you are using a remote database for PA you must install Microsoft SQL Server 2000 Analysis Services on both the database server and the PA server. See [“Install Microsoft SQL Server 2000 Analysis Services add-on.” on page 22](#).

NOTE This is an add-on to the SQL Server software included with the SQL Server media.

10. Download and install any required Microsoft SQL Server 2000 Service Packs, as indicated in *FileNet P8 Platform Hardware and Software Requirements*.

11. Restart the server.

12. Add the <PA Installer> user to the OLAP Administrators group.

Depending on your environment, this can be done in either of the following two ways:

- Local database
 - Add the <PA Installer> user to the local OLAP Administrator group.
- Remote database
 - (If the database server and PA Engine server belong to the same domain and <PA Installer> user is a domain user) Add the domain <PA Installer> user to the local OLAP Administrators group on every server on which you have installed Microsoft SQL Server 2000 Analysis Services.

- (If the database server and PA Engine server do *not* belong to the same domain) Create a duplicate of the <PA Installer> user on the database server.

Using the local user management tool, create a user with the same name and password as the <PA Installer> user created on the PA server.

Add the <PA Installer> user to the local OLAP Administrator group on every server on which you have installed Microsoft SQL Server 2000 Analysis Services.

13. (If the PA database will be remote from the PA Engine) Continue with [Task 3 “Install MS SQL Server Client software” on page 22.](#)
14. (If the database will be local) Continue with [Task 4 “Install Process Analyzer Engine” on page 24.](#)

To install and configure Microsoft SQL Server 2005

In addition to the following instructions, refer to Microsoft’s SQL Server 2005 installation instructions.

1. Log on as a local user with administrator privileges on the computer where the database will be installed.
2. In the Components to Install screen, at a minimum, select the following components:
 - SQL Server Database Services
 - Analysis Services
 - Workstation Components, Books Online and development tools
3. In the Instance Name screen, create a database instance for use by PA software, or verify that such an instance already exists.
4. In the Service Account screen, choose **Use the built-in System account**, and select **Local System** from the drop-down menu.
5. In the Authentication Mode screen:
 - Verify that authentication mode is set to **Mixed Mode**.
 - Provide an sa password for your site.
6. In the Collation Settings screen:

Select one of the following database collations:

- **Dictionary order, case-insensitive, for use with 1252 Character Set** (or any case-insensitive SQL Server collation). Case-insensitive collation is the Microsoft default and the setting most used in FileNet P8 environments (because it offers search results without regard to character case).
- **Dictionary order, case-sensitive, for use with 1252 Character Set** (or any case-sensitive SQL Server collation). Select case-sensitive SQL Server collation only if you are sure your site requires (and will continue to require) searches that must differentiate upper-case from lower-case characters (in property choice lists, folder names, and so on.).

CAUTION Select your SQL Server collation setting carefully. Switching collation settings after installation can be difficult and time-consuming, especially if you want to switch from case-

sensitive to case-insensitive collation after significant user activity. Also, be aware that if you have a case-sensitive database and you want to perform a case-insensitive search programmatically or otherwise, you will likely encounter serious performance degradation on SQL Server because the database cannot use column indexes in these cases.

7. Define a static port number.

If the PA database instance is not the only instance on the server, you must assign a non-conflicting static port number for the PA database instance using SQL Server Configuration Manager. For information, see your *MS SQL Server Documentation*.

8. Download and install the required Microsoft SQL Server 2005 Service Packs, as indicated in *FileNet P8 Platform Hardware and Software Requirements*.
9. Restart the server.
10. Verify that the <PA Installer> user has been given administrative privileges on the Online Transaction Analysis Processing (OLAP) database.

See the subtopic "(For MS SQL Server 2005) Add the user to the server role within SQL Server 2005 Analysis Services (SSAS)" of ["To create a Windows user with administrative privileges on the Online Transaction Analysis Processing \(OLAP\) database."](#) on page 15. [Hassi: Topic exists in the PA 401 IUG. Should we add an identical topic in this doc?]

11. (If the PA database will be remote from the PA Engine) Continue with [Task 3 "Install MS SQL Server Client software"](#) on page 22.
12. (If the database will be local) Continue with [Task 4 "Install Process Analyzer Engine"](#) on page 24.

Task 3: Install MS SQL Server Client software

If the PA database is remote from the PA server you must install the Microsoft SQL Server Client software on the PA Engine server.

Depending on your configuration, complete either of the following procedures:

- “To install SQL Server Client 2000” on page 22
- “To install SQL Server Client 2005” on page 22

To install SQL Server Client 2000

1. Install the SQL Server Client software.
 - a. Log on to the PA server with an account that has local administrator privileges.
 - b. Install the SQL Server Client software using the following options:
 - On the Installation Selection dialog box, choose **Create a new instance of SQL Server, or install Client Tools**.
 - On the Installation Definition dialog box, choose **Client Tools Only**.
 - Accept the defaults for the rest of the installation.
 - c. When the installation is complete, click **Start > Programs > Microsoft SQL Server > Client Network Utility**.
 - d. On the **DB-Library Options** tab, clear **Automatic ANSI to OEM conversion**.

2. Install Microsoft SQL Server 2000 Analysis Services add-on.

FileNet PA does not require any specific configuration settings when you install Microsoft SQL Server 2000 Analysis Services. Refer to Microsoft's SQL Server 2000 installation instructions.

NOTE This is an add-on to the SQL Server software included with the SQL Server media.

3. Download and install the required Microsoft SQL Server 2000 Service Pack, as indicated in the *FileNet P8 Platform Hardware and Software Requirements*.
4. Verify the connection between the SQL Server Client installation and the database machine.

At a command prompt type:

```
isql -E -S <servername>[\<instance_name>]
```

If the connection fails, be sure to resolve the problem before you proceed.

To install SQL Server Client 2005

1. Install the SQL Server Client software.
 - a. Log on to the PA server with an account that has local administrator privileges.

- b. Install the SQL Server Client software using the following options:
- In the Components to Install screen, select **Workstation Components, Books Online and development tools**.
 - In the Feature Selection dialog, select the following Client Components:
 - Connectivity Components
 - Management Tools
 - Accept the defaults for the rest of the installation.
2. Download and install the required Microsoft SQL Server 2005 Service Pack, as indicated in the *FileNet P8 Platform Hardware and Software Requirements*.
3. Verify the connection between the SQL Server Client installation and the database machine.

At a command prompt type:

```
sqlcmd -E -S <servername>[\<instance_name>]
```

If the connection fails, be sure to resolve the problem before you proceed.

Task 4: Install Process Analyzer Engine

Installing Process Analyzer Engine requires changes to the configuration of IM Process Engine, Web Service Client, and the database server, as well as on the computer where Process Analyzer Engine will be installed. Each of the required configuration changes is presented below. Perform the tasks in the order they are presented.

Collect required information

Before you install and configure the PA Engine, collect the information you will need during installation and configuration:

- The documentation server URL.
- The path to the Microsoft SQL Server JDBC driver install location.

Depending on your configuration, see:

- See [“To install the Microsoft SQL Server JDBC 2000 SP3 driver” on page 25](#) below.
- See [“To install the Microsoft SQL Server JDBC 2005 1.2 driver” on page 25](#) below.
- The dedicated TCP/IP port number of the SQL Server database instance that the PA Engine will use.
 - If you are installing SQL Server specifically for PA, you assigned the port number in [“Define a static port number.” on page 20](#).
 - If you are using a shared database instance, use the following procedure to determine the TCP/IP port number.

To find the port number on MS SQL Server 2000

- i. On the SQL Server machine, open SQL Server Enterprise Manager.
- ii. Display the database instance properties.
- iii. Click **Network Configuration** on the **General** tab.
- iv. Select **TCP/IP** in Enabled protocols, and click **Properties**.

To find the port number on MS SQL Server 2005

- i. Open the Microsoft SQL Server 2005 program group and open “Configuration Tools”.
 - ii. Then select “SQL Server Configuration Manager”.
 - iii. Expand the “SQL Server 2005 Network Configuration” leaf.
 - iv. Select “Protocols for MSSQLSERVER” or your Named Instance and double click “TCP/IP” and select the “IP Address” tab.
 - v. In the TCP/IP Properties dialog box locate the “TCP Port” to see what TCP/IP port is being used.
- The name of the database server, if PA is configured with a remote database.
 - The name of the database instance, if PA is configured with a non-default database instance.

- (MS SQL 2005) The name of the Analysis Services instance, if Analysis Services is configured as a named instance.
- The <PA DB Administrator> user ID and password for the PA database instance. This is the user created in “Users required at runtime” on page 13.

To install the Microsoft SQL Server JDBC 2000 SP3 driver

If the Microsoft® SQL Server™ JDBC 2000 SP3 driver is not already installed on your system, download and install it from www.microsoft.com.

NOTE To complete the PA installation, enter the path to the Microsoft® SQL Server™ JDBC 2000 SP3 driver install location, see “Configure JDBC Driver” on page 26.

To install the Microsoft SQL Server JDBC 2005 1.2 driver

If the Microsoft® SQL Server™ JDBC 2005 1.2 driver is not already installed on your system, download and install it from www.microsoft.com.

NOTE To complete the PA installation, enter the path to the Microsoft® SQL Server™ JDBC 2005 1.2 driver install location, see “Configure JDBC Driver” on page 26.

Install Process Analyzer Engine Software

1. Ensure that the database instance that the Process Analyzer Engine will use is running.
2. Log on as the Process Analyzer Administrator, as defined in “Prerequisite Tasks” on page 15.
3. Access the IBM FileNet Image Manager Process Analyzer 3.5.5 software package.
4. Launch the Setup program (**IMPA-3.5.5-Engine.exe**, located in the **PAEngine** directory) to start the installation process.

In this screen...	Perform this action...
Software License Agreement	Review and accept the license agreement.
Verify that all workflow software is stopped.	If Setup detects FileNet workflow software on the server, it prompts you to stop the software before continuing. Click Next when you are ready to proceed.
Specify Installation Location	Choose the destination drive and directory for Process Analyzer Engine software.

In this screen...	Perform this action...
Specify the Documentation URL	<p>Enter the Documentation URL, which is where the IM Process Analyzer online help is installed. Your entry must be in the following format:</p> <pre>http://<docserver>:<port#>/fnpa300docs</pre> <p>where:</p> <p><i>docserver</i> is the name of the web server.</p> <p><i>port#</i> is the web server's port number.</p> <p>fnpa300docs is the root folder of the documentation web site.</p>
Specify the Database Location	Indicate whether the database will be local or remote.
(Remote Database) Specify the Database Configuration Parameters	<p>Enter the name of the remote database server.</p> <p>Enter the name of the instance to be used by IM Process Analyzer. Leave the field blank if the default instance is to be used; otherwise enter the name of the instance that was created in "Install Microsoft SQL Server" on page 18.</p> <p>Enter the static TCP/IP database port number that was assigned in "Install Microsoft SQL Server" on page 18.</p> <p>Enter the database user name and password. This is the name of the <i><Process Analyzer Administrator></i> created in "Prerequisite Tasks" on page 15.</p>
(Local Database) Specify the Database Configuration Parameters	<p>Enter the name of the instance to be used by IM Process Analyzer. Leave the field blank if the default instance is to be used; otherwise enter the name of the instance that was created in "Install Microsoft SQL Server" on page 18.</p> <p>Enter the static TCP/IP database port number that was assigned in "Install Microsoft SQL Server" on page 18.</p> <p>Enter the database user name and password. This is the name of the <i><Process Analyzer Administrator></i> created in "Prerequisite Tasks" on page 15.</p>
(MS SQL 2005 only) Specify the Analysis Services Configuration Parameters	<p>Enter the Analysis Services Instance Name.</p> <p>Leave blank if you are using the default instance.</p>
Configure JDBC Driver	Enter the Microsoft SQL Server JDBC 2000 SP3 or Microsoft SQL Server JDBC 2005 1.2 driver classname and classpath.

In this screen...	Perform this action...
Installation Summary	<p>Read and verify the installation summary information.</p> <p>Click Install if the information is correct, or click Back to make changes.</p> <p>NOTE In addition to installing Process Analyzer Engine, the Setup program also creates the IM Process Analyzer database, VMAEDM, and an OLAP database, VMAE. This process might take several minutes to complete.</p> <p>If IM Process Analyzer is configured with a named database instance, the name of the OLAP database will be VMAE_<database_instance_name>.</p> <p>For example, if the database instance name is “inst1”, the OLAP database name is VMAE_inst1.</p>
Complete the Installation	<p>When the installation is complete and the selected software has been started, click Finish to exit the installation program.</p>

Configure the Process Analyzer Engine

1. On the Process Analyzer Engine, launch Process Task Manager.
2. Schedule data warehouse pruning and cube processing.
 - a. Select the Process Analyzer node and click the **Scheduler** tab.
 - b. Choose the desired scheduling options for both cube processing and pruning events.
3. Configure any additional Process Analyzer options on the remaining tabs as needed.

For information on the Process Analyzer tabs, see Process Analyzer Documentation > Process Analyzer Configuration and Administration > Configuring the Process Analyzer in *IM Process Analyzer online help*.
4. Click **Apply** to save and apply your changes.

5. (IM Process Analyzer uses a remote database) Configure IM Process Analyzer for a remote database

- a. Configure the following services to log on as the <Process Analyzer Administrator>.

Service (MS SQL 2000)	Service (MS SQL 2005)	Location
Process Analyzer Services Manager	Process Analyzer Services Manager	Process Analyzer Engine
MSSQLServer	SQL Server	database server
MSSQLOLAPServer	SQL Server Analysis Services	database server

- b. On the Process Analyzer Engine, create a shared Temp directory and grant full access rights on the on the Security and Sharing tabs for the folder to the <Process Analyzer Administrator>.
- c. In the Process Analyzer Task Manager, specify the path for the shared Temp directory in UNC format.
- i. On the Process Analyzer Engine, launch Process Task Manager.
- ii. Select the **Process Analyzer** node and then select the **General** tab.
- iii. In the Temp Directory (UNC) field, enter the path to the shared Temp directory in UNC format; for example;

\\im_process_analyzer_server\temp

where “pa_server” is the name of the Process Analyzer Engine server and “temp” is the name of the shared Temp directory you created.

6. Right-click **Process Analyzer** and select **Start** to start the Process Analyzer services from Process Task Manager.
7. Proceed to the [“Grant access to the IM Process Analyzer OLAP database” on page 28](#) .

Grant access to the IM Process Analyzer OLAP database

Before anyone can use the system, you must grant access to the IM Process Analyzer OLAP database. Use the Microsoft Analysis Manager (MS SQL Server 2000) or Microsoft SQL Server Management Studio (MS SQL Server 2005) to create roles and assign users. See [“<PA Client Database User>” on page 14](#) and the online help for the MS SQL Server for more information and detailed instructions.

CAUTION Use this procedure only as a guide to creating roles because each site's security requirements differ.

1. Log on to the IM PA database server as the user with administrative rights on MS SQL Server.
2. (If the database server and IM PA Client server do *not* belong to the same domain) Create a duplicate of the client user on the database server.

Using the local user management tool, create a user with the same name and password as the user that will log on to the IM PA Client server.

3. Grant access rights to the IM Process Analyzer OLAP database

(MS SQL Server 2000) To grant access rights using Microsoft Analysis Manager

- a. Go to Start > Microsoft SQL Server > Analysis Service > Analysis Manager.
- b. Expand Analysis Servers > <SQL Server name> > VMAE_<database_instance_name>.

NOTE If you are using the default instance, no instance name is appended.

- c. Right-click **Database Roles** and select **Manage Roles**.
 - d. Give the user access to the OLAP cubes.
 - i. Click **New** in the Database Role Manager screen that opens.
 - ii. Enter the following information:
 - Role Name - Give a descriptive name for the role.
 - Description - Describe how the role will be used.
 - Enforce on - Select **Client**.
 - iii. Select the **Membership** tab.
 - iv. Click **Add**.
 - v. Select one of the following in the Add Users and Groups dialog box:
 - The local user you just created.
 - A domain user or group of users used to log on to the IM PA Client server.
 - vi. Click **Add**.
- NOTE** If you want to add more than one user or group, you must add them separately by repeating [Step iv](#) through [Step vi](#).
- vii. Click **OK**.
 - viii. Select the **Cubes** tab.
 - ix. Click **Check All**.
 - x. Click **OK**.
 - xi. Click **Close** in the Database Role Manager screen.

(MS SQL Server 2005) To grant access rights using Microsoft SQL Server Management Studio

- a. Go to Start > Programs > Microsoft SQL Server 2005 > SQL Server Management Studio.
- b. Connect to your analysis services instance.
- c. Expand Databases > VMAE_<database_instance_name>.

NOTE If you are using the default instance, no instance name is appended.

- d. Right-click **Roles** and select **New Role....**
- e. Give the user access to the OLAP cubes.
 - i. Enter the following information:
 - Role Name - Give a descriptive name for the role.
 - Description - Describe how the role will be used.
 - ii. Set the database permissions for this role to be Full control (Administrator).
 - iii. Click **OK**.

Enable IM Process Analyzer for Process Engine

1. Log on to the FileNet Web Services Client as a member of the SysAdmin group.
2. On the FileNet Web Services Client page, select **Process**.
3. Select **Process Configuration Console**.
4. Select the icon of the appropriate VWService and click **Properties** on the toolbar.
5. On the Runtime Options tab, enable Process Analyzer.

For details:

- i. Access the eProcess online help (the following help topic doesn't exist in the IM Process Analyzer help).
- ii. On the Help directory page, under Help for Process Administrators, click **Process Configuration Console help**.
- iii. Navigate to VWServices > Modify VWServices Properties > Set runtime options.

To enable IM Process Analyzer

- a. Select the VWService you wish to modify and click **Properties** on the toolbar.
 - b. Select the Runtime Options tab, and check "Enable Process Analyzer."
 - c. Click **OK** to save your changes.
 - d. Use Process Task Manager to restart the IM Process Engine software on all servers to make the changes take effect.
6. Click **OK**.

Configure IM Process Engine

1. On the IM Process Engine server, launch Process Task Manager.
2. If the Process Service is running, select the Process Service node and click **Stop** on the toolbar to stop it.
3. Select the Process Service node in the left panel, then select the **Server Connections** tab in the Properties panel.

4. Enter the host name of the **Process Analyzer Engine** and the **Process Analyzer Port**. The port you enter must match the Data port field in the Process Analyzer Task Manager - Advanced tab.
5. Click **Apply** to save your changes.
6. Select the Process Service node and click **Start** on the toolbar to start the Process Service.
7. Proceed to ["Install Process Analyzer Client" on page 32](#).

Task 5: Install Process Analyzer Client

Process Analyzer Client software consists of out-of-the-box reports and templates. You can install Process Analyzer Client in a single location that multiple end users will access or on each end user workstation. Determining factors should be the number of end users who will access the user's reports and the sophistication of the end users.

NOTES

- Before beginning this task, verify that all applicable tasks listed in the [“Prerequisite Tasks” on page 15](#) have been completed.
- The client user must be in the same domain as the Process Analyzer Engine user in order to connect to the Process Analyzer Engine. For information, see [“To grant access rights in Microsoft Analysis Manager \[Hassi: Added per Anita, 111307.\]” on page 32](#).
- During Process Analyzer Client configuration, you will need the name of server where the Image Manager Process Analyzer database is located and if applicable, the named database instance used.

Install prerequisite software

All Image Manager Process Analyzer Client machines and all end user workstations that will access the out-of-the-box reports or that will create reports must have:

- Microsoft Excel with query analyzer (MS Query) installed.
For Excel version requirements, see the *eProcessCompatibilityDependencyHardware.xls* document. See Microsoft documentation for instructions on how to install and configure Microsoft Excel.
- MS SQL Server add-ons:
 - MS SQL Server 2000:
 - Microsoft SQL Server 2000 PivotTable Services
 - MS SQL Server 2005:
 - Microsoft Core XML Services (MSXML) 6.1
 - Microsoft SQL Server 2005 Analysis Services 9.0 OLE DB Provider.

NOTE These add-ons are available for download from Microsoft. For details, see the *eProcessCompatibilityDependencyHardware.xls* document.

[Hassi: Remove the procedure below per Christopher?]

To grant access rights in Microsoft Analysis Manager [Hassi: Added per Anita, 111307.]

Before anyone can use the system, you must grant access to the Image Manager Process Analyzer OLAP database. Use the Microsoft Analysis Manager (MS SQL Server 2000) or Microsoft SQL Server Management Studio (MS SQL Server 2005) to create roles and assign users. See “<PA Client Database User>” on page 14 and the online help for the MS SQL Server for more information and detailed instructions.

CAUTION Use this procedure only as a guide to creating roles because each site's security requirements differ.

1. Log on to the Image Manager Process Analyzer database server as the user with administrative rights on MS SQL Server.
2. (If the database server and Image Manager Process Analyzer Client server do *not* belong to the same domain) Create a duplicate of the client user on the database server.

Using the local user management tool, create a user with the same name and password as the user that will log on to the Image Manager Process Analyzer Client server.

3. Grant access rights to the Image Manager Process Analyzer OLAP database

(MS SQL Server 2000) To grant access rights using Microsoft Analysis Manager

- a. Go to Start > Microsoft SQL Server > Analysis Service > Analysis Manager.
- b. Expand Analysis Servers > <SQL Server name> > VMAE_<database_instance_name>.

NOTE If you are using the default instance, no instance name is appended.

- c. Right-click **Database Roles** and select **Manage Roles**.
- d. Give the user access to the OLAP cubes.
 - i. Click **New** in the Database Role Manager screen that opens.
 - ii. Enter the following information:
 - Role Name - Give a descriptive name for the role.
 - Description - Describe how the role will be used.
 - Enforce on - Select **Client**.
 - iii. Select the **Membership** tab.
 - iv. Click **Add**.
 - v. Select one of the following in the Add Users and Groups dialog box:
 - The local user you just created.
 - A domain user or group of users used to log on to the Image Manager Process Analyzer Client server.

- vi. Click **Add**.

NOTE If you want to add more than one user or group, you must add them separately by repeating Step iv through Step vi.

- vii. Click **OK**.
- viii. Select the **Cubes** tab.
- ix. Click **Check All**.
- x. Click **OK**.
- xi. Click **Close** in the Database Role Manager screen.

(MS SQL Server 2005) To grant access rights using Microsoft SQL Server Management Studio

- a. Go to Start > Programs > Microsoft SQL Server 2005 > SQL Server Management Studio.
- b. Connect to your analysis services instance.
- c. Expand Databases > VMAE_<database_instance_name>.

NOTE If you are using the default instance, no instance name is appended.

- d. Right-click **Roles** and select **New Role....**
- e. Give the user access to the OLAP cubes.
 - i. Enter the following information:
 - Role Name - Give a descriptive name for the role.
 - Description - Describe how the role will be used.
 - ii. Set the database permissions for this role to be Full control (Administrator).
 - iii. Click **OK**.

To install and configure the Process Analyzer Client software

1. Access the IBM FileNet Image Manager Process Analyzer 3.5.5 software package.

Launch the Setup program (**IMPA-3.5.5-Client.exe**, located in the **PAClient** directory) to start the installation process.

NOTE 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.

In this screen...	Perform this action...
License Agreement	Review and accept the license agreement.
Specify Installation Location	Choose the destination drive and directory for the Process Analyzer Client software.
Specify the Documentation URL	<p>Enter the Documentation URL, which is where the Image Manager Process Analyzer online help is installed. Your entry must be in the following format:</p> <pre>http://<docserver>:<port#>/fnpa300docs</pre> <p>where:</p> <p><i>docserver</i> is the name of the web server.</p> <p><i>port#</i> is the web server's port number.</p> <p>fnpa300docs is the root folder of the documentation web site.</p>

In this screen...	Perform this action...
Installation Summary	Read and verify the installation summary information. Click Install if the information is correct, or click Back to make changes.
Complete the Installation	To configure the out-of-the-box reports for your system, check the box to Run the Process Analyzer Client Configuration Tool , and Finish .

2. Configure the Process Analyzer Client.

NOTES

If you are logged in as a user that is not a *<Process Analyzer Client Database User>*, you must now log out, and then log back in as a *<Process Analyzer Client Database User>* before you proceed.

Instead of storing the reports on each individual server, you can make them available to remote workstations by sharing the drive where the reports are located on the network, saving the reports to a network drive, or saving the reports to an object store.

If you take one of these actions, you must:

- Verify that the prerequisite software is installed on each end-user's workstation. See the *eProcessCompatibilityDependencyHardware.xls* document for details.
 - Point the end users to the location of the reports.
 - Point the end users to the "Process Analyzer User Guide" topic in the *Image Manager Process Analyzer Documentation*.
3. (If you need to start the configuration tool after you log on as a *<Process Analyzer Client Database User>*) From the Start menu, navigate to Programs > FileNet Image Manager > Process Analyzer > Process Analyzer Client Configuration Tool.
 4. Enter the name of the server where the Image Manager Process Analyzer database is located.
Depending on whether the Process Analyzer Engine has a local or remote database, your entry is the name of:
 - the server where the Process Analyzer Engine software was installed
 - or
 - the remote database server used by the Process Analyzer Engine
 5. If the Process Analyzer Engine uses a named instance of the database, enter the name of that instance. If the default database instance is used, no entry is required.
 6. Verify that the folder where you store your reports is listed in the Report Folder field.

NOTE By default, the field contains the location where Setup installed the out-of-the-box reports. If your reports are stored in another folder, enter the path to this folder here.

7. Click **Configure**.

The Client Configuration Tool configures the out-of-the-box reports by configuring the data connection in all Excel spreadsheets in all folders one level below the indicated folder.

NOTE After the configuration completes, on the Process Analyzer Client machine you can view and modify the sample reports or create new reports. For details, see the *IBM FileNet Image Manager Process Analyzer online* topic Process Analyzer User Guide (also available on the client server by navigating to Start > Programs > FileNet Image Manager > Process Analyzer > Process Analyzer User Guide).

8. Select **File > Exit** to close the Client Configuration Tool.

9. Click **Exit** to close the Process Analyzer Setup dialog.

Upgrade Planning and Procedures

This upgrade section contains the following major topics:

- [“Upgrade Overview” on page 38](#)
- [Task 1 “Upgrade Image Manager Process Analyzer Documentation” on page 41.](#)
- [Task 2 “Upgrade Process Analyzer Engine” on page 42.](#)
- [Task 4 “Upgrade Process Analyzer Client” on page 46.](#)

Upgrade Overview

This section lists details that will help you prepare your environment for the upgrade of Image Manager Process Analyzer. In many cases, the items you see listed will be links to more detailed information, which will help you plan a system upgrade. Review this information thoroughly before you start to upgrade Image Manager Process Analyzer or required third-party software.

NOTE The upgrades described in this guide assume that you will retain your basic platform configuration from the previous release.

Supported Upgrade Paths

Before you upgrade to Image Manager Process Analyzer 3.5.5, verify that an existing Image Manager Process Analyzer 3.5.4 system is installed and configured.

NOTE You cannot upgrade directly to Image Manager Process Analyzer 3.5.5 from any version prior to 3.5.4.

Upgrade Planning Considerations

Before you begin the upgrade:

- **Gather auxiliary documentation.** See [“Gather required documentation” on page 10](#).
- **Gather Pre-upgrade Information.**
 - **Note the Documentation URL.** If you have an existing application server in place with an Image Manager Process Analyzer online documentation web site established, note its location.
 - **Note your current Database Instance Names, NLS, and Character set configurations.**
- **Database**

FileNet Image Manager Process Analyzer 3.5.5 supports MS SQL 2005.

CAUTION If you plan to upgrade to MS SQL 2005 you must first upgrade your Image Manager Process Analyzer installation to version 3.5.5 and verify that the upgrade was successful.

- **Apply fix packs and upgrade third-party software.**
 - **Apply the required minimum level of Image Manager Process Analyzer fix packs to the currently installed software before you upgrade.** IBM FileNet fix packs often include feature updates that are required to ensure a successful upgrade. Therefore, prior to beginning your upgrade to Image Manager Process Analyzer 3.5.5, you must have applied at least the minimum level of fix packs to your installed 3.5.4 components.
 - **Upgrade third-party software.** Prior to upgrading your IBM FileNet software, we recommend you update your third-party software (for instance operating system, database, directory service, and so on) to the patch and Service Pack levels that Image Manager Process Analyzer supports.

NOTE For requirement details for all eProcess and Image Manager Process Analyzer components, as well as the minimum supported levels of third-party software components, see the *eProcessCompatibilityDependencyHardware.xls* document. To access this document, follow the instructions in [“Access IBM FileNet Documentation, Compatibility Matrices, and Fix Packs” on page 10](#), and navigate to the *Hardware/Software Requirements for FileNet Products* page from the Product Support page.

- **Verify that the site has restorable backups of system and data of all Image Manager Process Analyzer and Process Engine components.** In case of an emergency, you may need to back out of the upgrade.
- **Verify that no users or processes are accessing Image Manager Process Analyzer or Image Manager Process Engine.**
- **Disable tasks such as:**
 - scheduled automated backups
 - virus scanning

Task 1: Upgrade Image Manager Process Analyzer Documentation

The Image Manager Process Analyzer 3.5.5 release does not support upgrading the existing Image Manager Process Analyzer 3.5.4 online help. To access the Image Manager Process Analyzer 3.5.5 help you must install the Image Manager Process Analyzer online help as a new separate web application, see [“Install Image Manager Process Analyzer 3.5.5 Documentation” on page 16](#). [Hassi: Still unclear what the actual procedure will be.]

Task 2: Upgrade Process Analyzer Engine

To prepare to upgrade Process Analyzer Engine

1. Stop Image Manager Process Analyzer and disable the connection between Image Manager Process Analyzer and Process Engine.
 - a. On the Process Analyzer Engine server, launch Process Task Manager.
 - b. Right-click on the Process Analyzer node and select **Stop** from the context menu.
 - c. Select the **Advanced** tab.
 - d. Make note of the port number in the Data Port field and then set the field to an unused port number.

NOTE This field must be set to an integer and cannot be left blank.
 - e. Exit the Process Task Manager.
2. In Windows, navigate to Start > Control Panel > Administrative Tools > Services and stop Process Services Manager.
3. Back up the following items:
 - The database used by the IM Process Engine that this Process Analyzer Engine is connected to.
 - The VMAEDM database.
 - The **HKEY_Local_Machine\Software\FileNet\Process Analyzer Engine** registry key on the Process Analyzer Engine server.
 - The VMAE OLAP database. Make a note of any special configuration that has been applied to cubes or dimensions, such as role assignments or auto-grouping. The configuration must be reapplied after the upgrade is complete. See the online help for the Analysis Manager for information and detailed instructions on creating roles and assigning users.
4. Ensure that the necessary software is installed. See the *eProcessCompatibilityDependencyHardware.xls* document for details. To access this document, follow the instructions in [“Access IBM FileNet Documentation, Compatibility Matrices, and Fix Packs” on page 10](#), and navigate to the *Hardware/Software Requirements for FileNet Products* page from the Product Support page.

To upgrade Process Analyzer Engine

1. Verify that the database instance that the Process Analyzer Engine will use is running.
2. Log on as the *<Process Analyzer Administrator>*, as defined in [“Prerequisite Tasks” on page 15](#).
3. Access the IBM FileNet Image Manager Process Analyzer 3.5.5 software package.

4. Launch the Setup program (**IMPA-3.5.5-Engine.exe**, located in the **PAEngine** directory) to start the installation process.

In this screen...	Perform this action...
License Agreement	Review and accept the license agreement.
Verify that all workflow software is stopped.	If Setup detects FileNet workflow software on the server, it prompts you to stop the software before continuing. Click Next when you are ready to proceed.
Upgrade summary dialog.	Review the information.
Specify the Documentation URL	<p>Enter the Documentation URL, which is where the Image Manager Process Analyzer online help is installed. Your entry must be in the following format:</p> <p><code>http://<docserver>:<port#>/fnpa300docs</code></p> <p>where:</p> <p><i>docserver</i> is the name of the web server.</p> <p><i>port#</i> is the web server's port number.</p> <p><i>fnpa300docs</i> is the root folder of the documentation web site.</p>
Installation Summary	<p>Read and verify the installation summary information.</p> <p>Click Install if the information is correct, or click Back to make changes.</p>
Complete the Installation	<p>When the installation is complete and the selected software has been started, exit the installation program.</p> <p>NOTE Depending on the state of the Image Manager Process Analyzer server, you might be prompted to reboot the computer.</p>

5. Enable the connection between Image Manager Process Analyzer and Process Engine.
 - a. On the Process Analyzer Engine server, launch Process Task Manager.
 - b. Select the **Advanced** tab.
 - c. Set the Data Port field back to its original value. The default port number is 32772.
6. Upgrade the Image Manager Process Analyzer database.
 - a. On the Process Analyzer Task manager, right-click the **Process Analyzer** node and select **Start** from the context menu.
 - b. When prompted to upgrade the database ,click **Yes**, and check the "Stop Process Analyzer after upgrade has completed."

7. Reprocess the OLAP cubes. See the procedure on [“Reprocess the OLAP cubes” on page 44](#) for instructions.
8. Backup the upgraded VMAEDM.
9. Reapply any special configuration that has been applied to cubes or dimensions, such as role assignments or auto-grouping.

Reprocess the OLAP cubes

1. On the Process Analyzer Engine server, launch Process Task Manager.
2. Right-click **Process Analyzer** and select **Start** to start the Process Analyzer services.
3. Right-click the **Process Analyzer** node again and select **Process Cubes**.
4. Confirm that you want to proceed with the reprocessing.
5. Proceed to [“Upgrade Process Analyzer Client” on page 46](#).

Task 3: (Optional) Upgrade MS SQL Server 2000 to version 2005.

1. Back up the upgraded PA database (VMAEDM).
2. Upgrade MS SQL Server 2000 to version 2005.

NOTE You can perform this step any time after installing Image Manager Process Analyzer Engine. This version of Image Manager Process Analyzer Engine runs on both MS SQL 2000 and MS SQL 2005. You might want to verify the functionality of the updated Image Manager Process Analyzer Engine before upgrading the database.

- a. Stop Process Analyzer software, if running.
- b. Follow Microsoft instructions to upgrade the database from MS SQL Server 2000 to MS SQL Server 2005.

CAUTION When upgrading a named instance of MS SQL Server don't select to upgrade Analysis Services on the Components to Install screen. To upgrade the default instance of Analysis Services used by Image Manager Process Analyzer you must run the SQL Server 2005 setup a second time, this time selecting to upgrade the default instance and choosing the Analysis Services component.

- c. Download and install the Microsoft SQL Server 2005 JDBC driver.
- d. Delete the existing Process Analyzer OLAP database.
 - i. Go to Start > Programs > Microsoft SQL Server 2005 > SQL Server Management Studio.
 - ii. Connect to the Analysis Services instance used.
 - iii. Expand Databases.
 - iv. Right click the OLAP database (VMAE_<db_instance_name>) and select **Delete**.

NOTE If you are using the default instance, no instance name is appended.

- v. Click **OK** to delete the database.
- e. Rebuild the OLAP database and update the PA configuration

- i. Open a command prompt
- ii. Change directories to:

`C:\Program Files\FileNet\Process Analyzer Engine\jpa\scripts\sqlserver\2005`

- iii. Run the script **upgradeconfig.bat**.
- iv. The upgradeconfig script will display a dialog. Enter the Microsoft SQL Server 2005 JDBC classpath and click **OK**.

3. Reapply any special configuration that has been applied to cubes or dimensions, such as role assignments or auto-grouping.

Task 4: Upgrade Process Analyzer Client

Before you upgrade Process Analyzer Client you must backup existing custom reports and uninstall the previous client software.

Backup reports.

Before you uninstall the previous client you should create backup copies of your existing custom reports that are stored in the default path (the installation location you selected when installing the PA Client). All files in this path will be overwritten by the client installer.

Default: **C:\Program Files\FileNet\Process Analyzer Client\ootbreport**

Uninstall Process Analyzer Client version 3.5.4.

1. From the Windows Control Panel launch **Add/Remove Programs**.
2. Select the FileNet Process Analyzer Client application from the list of installed programs and click **Change/Remove**.
3. Click **Yes** to confirm that you want to remove the Image Manager Process Analyzer Client application.
4. When the Uninstall program is finished, click **OK**.
5. Close the Add/Remove Programs snap-in.
6. Close the Control Panel.

Install Process Analyzer Client version 3.5.5

To install PA Client, follow the instructions in [Task 5 "Install Process Analyzer Client" on page 32](#).

Remove Software

This section presents steps for removing Process Analyzer Engine and Process Analyzer Client.

To remove Process Analyzer Client

1. From the Windows Control Panel launch Add/Remove Programs.
2. Select the FileNet Process Analyzer Client 3.5.5 application from the list of installed programs and click **Change/Remove**.
3. Click **Yes** to confirm you want to remove the Process Analyzer Client application.
4. When the Uninstall program is finished, click **OK**.
5. Close the Add/Remove Programs snap-in.
6. Close the Control Panel.

To remove Process Analyzer Engine

1. Stop the Process Analyzer Engine.
 - a. On the Process Analyzer Engine server, launch Process Task Manager.
 - b. Right-click **Process Analyzer** and select **Stop** from the context menu.
 - c. Close Process Task Manager.
2. From the Windows Control Panel launch Add/Remove Programs.
3. Select the Image Manager Process Analyzer Engine 3.5.5 application from the list of installed programs and click **Change/Remove**.
4. The Uninstall program displays a summary of the software it will remove. Review the summary and click **Next**.
5. The Uninstall program displays a series of prompts asking you to confirm that you want to remove the Image Manager Process Analyzer Help URL, vwtaskman.xml, taskman.properties, and analyzer.properties files. Click **Yes** to remove these files.
6. The Uninstall program displays a summary of the software it successfully removed. Review the summary and click **Finish**.

NOTE Depending on the state of the system you might be prompted to restart the computer to complete the uninstall process.
7. Close the Add/Remove Programs snap-in.
8. Close the Control Panel.
9. Disable Image Manager Process Analyzer on the IDM WS web server. [Heajin: I can not verify this step, we don't have IMD WS setup for IMPA 3.5.5 project]
 - a. Log on to the FileNet Web Services Client as a member of the SysAdmin group.

- b. On the FileNet Web Services Client page, select **Process**.
 - c. Select **Process Configuration Console**.
 - d. Select the VWSservice you wish to modify and click **Properties** on the toolbar.
 - e. Select the Runtime Options tab, and clear "Enable Process Analyzer."
 - f. Click **OK** to save your changes.
 - g. Use Process Task Manager to restart the IM Process Engine software on all servers to make the changes take effect.
10. Disable the Image Manager Process Analyzer on the IM Process Engine.
- a. On the IM Process Engine server, launch Process Task Manager.
 - b. Right-click **Process Service** and select **Stop** from the context menu.
 - c. Select the **Server Connections** tab and clear the entries in the Process Analyzer fields.
 - d. Right-click **Process Service** and select **Start** from the context menu to restart the Process Service.
 - e. Close Process Task Manager.
 - f. Use Process Task Manager to restart the IM Process Engine software on all servers.

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