FileNet Case Foundation
Version 5.2.0

IBM FileNet Case Analyzer Installation and Upgrade Guide

GC19-3915-00

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Note
Before using this information and the product it supports, read the information in "Notices" on page 47.

This edition applies to version 5.2.0 of IBM Case Foundation (product number 5724-R76) and to all subsequent releases and modifications until otherwise indicated in new editions.

Contents

ibm.com and related resources

Product support and documentation are available from ibm.com.

Support and assistance

Product support is available on the Web. Click Support from the product Web site at:

FileNet Content Manager Support
http://www.ibm.com/software/data/content-management/filenet-content-manager/support.html

Information center

You can view the product documentation in an Eclipse-based information center that you can install when you install the product. By default, the information center runs in a Web server mode that other Web browsers can access. You can also run it locally on your workstation. See the information center at http://pic.dhe.ibm.com/infocenter/p8docs/v5r2m0/index.jsp.

PDF publications

You can view the PDF files online using the Adobe Acrobat Reader for your operating system. If you do not have the Acrobat Reader installed, you can download it from the Adobe Web site at http://www.adobe.com.

See the following PDF publications Web sites:

Product	Web site
Product Documentation for FileNet P8 Platform	http://www.ibm.com/support/docview.wss?rs=86&uid=swg27021508

"How to send your comments"
Your feedback is important in helping to provide the most accurate and highest quality information.

"Contacting IBM" on page vi
To contact IBM customer service in the United States or Canada, call 1-800-IBM-SERV (1-800-426-7378).

How to send your comments

Your feedback is important in helping to provide the most accurate and highest quality information.

Send your comments by using the online reader comment form at https://www14.software.ibm.com/webapp/iwm/web/signup.do?lang=en_US&source=swg-rcf.

Consumability survey

You are invited to tell IBM how to improve the consumability of software products. If you want to help IBM make IBM® FileNet® P8 easier to use, take the Consumability Survey at http://www.ibm.com/software/data/info/consumability-survey/.

Contacting IBM

To contact IBM customer service in the United States or Canada, call 1-800-IBM-SERV (1-800-426-7378).

To learn about available service options, call one of the following numbers:

- In the United States: 1-888-426-4343
- In Canada: 1-800-465-9600

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Planning and preparing for installation

This section describes the process for planning for and performing the required prerequisite tasks for an IBM FileNet Case Analyzer 5.2.0 installation.

Case Analyzer was formerly known as Process Analyzer. Review all of the topics in the following sections carefully before you begin.

"Planning the installation"
This section lists details that help you prepare your environment for the installation of IBM FileNet Case Analyzer on an IBM FileNet P8 system.

"Performing required preparation tasks" on page 5
You must complete all of the required preparation tasks before you start the installation.

Planning the installation

This section lists details that help you prepare your environment for the installation of IBM FileNet Case Analyzer on an IBM FileNet P8 system.

In many cases, the items are links to more detailed information which help you plan a system rollout of this expansion product. Review this section thoroughly before you start to set up associated FileNet P8 components or required vendor software.

Before you begin to install Case Analyzer, perform the following planning activities:

- Gather auxiliary documentation. Browse their contents and study those parts that seem most relevant to your installation and application plans.
- See "Using the installation and upgrade worksheet" on page 3 for more information about an available Worksheet to record information that is needed during installation.

"Definition of installation roles"
The tasks in this guide and the rows in the Installation and Upgrade Worksheet are organized by administrative roles. Your organization might have different roles, and some of the responsibilities of listed roles will vary from those assigned by default in this documentation.

"Using the installation and upgrade worksheet" on page 3
The Installation and Upgrade Worksheet is a Microsoft Excel spreadsheet (`p8_worksheet.xls`). The worksheet describes the properties and parameters required to complete IBM FileNet P8 installation, upgrade, and configuration programs, and provides a way to record the values you assign to these properties and parameters.

Definition of installation roles

The tasks in this guide and the rows in the Installation and Upgrade Worksheet are organized by administrative roles. Your organization might have different roles, and some of the responsibilities of listed roles will vary from those assigned by default in this documentation.

Installation administrator

- Runs FileNet P8 installation programs during initial setup.
- Runs Configuration Manager during initial setup, followed by starting IBM Administration Console for Content Platform Engine.
- Runs FileNet P8 upgrade programs during upgrades.
- Abbreviated as IA. Responsible for coordinating the information described in this worksheet. The information itself will require the input from the other roles.

The role of IA is usually filled by an IBM FileNet Certified Professional (FCP).

Information technology administrator

- Responsible for the networking and operating systems settings required by FileNet P8.
- Responsible for performing certain security configurations.
- Abbreviated as ITA. Responsible for providing the information in the rows in the *Installation and Upgrade Worksheet* with a value of ITA in the Role column.

Security administrator

- Responsible for configuring the directory servers required by FileNet P8 components, including Content Platform Engine and Application Engine.
- Creates and maintains directory server user and group accounts.
- Abbreviated as SA. Responsible for providing the information in the rows in the *Installation and Upgrade Worksheet* with a value of SA in the Role column.

Database administrator

- Creates, configures, maintains database installations and database or table spaces.
- Responsible for creating database accounts needed by FileNet P8.
- For purposes of this documentation, the database administrator is expected to have responsibilities regarding the JDBC data sources.
- Abbreviated as DBA. Responsible for providing the information in the rows in the *Installation and Upgrade Worksheet* with a value of DBA in the Role column.

Application server administrator

- Responsible for providing the application servers required by FileNet P8.
- Responsible for application server administrative accounts.
- Abbreviated as ASA. Responsible for providing the information in the rows in the *Installation and Upgrade Worksheet* with a value of ASA in the Role column.

FileNet P8 administrator

- This role designation actually refers to the administrator or administrators who perform regular maintenance of Content Platform Engine, Application Engine, Workplace or Workplace XT.
- The administrator who logs on to IBM Administration Console for Content Platform Engine by using the *gcd_admin* account or an *object_store_admin* account is considered a FileNet P8 administrator.
- Abbreviated as P8A. Responsible for providing the information in the rows of the *Installation and Upgrade Worksheet* with a value of P8A in the Role column.

Using the installation and upgrade worksheet

The Installation and Upgrade Worksheet is a Microsoft Excel spreadsheet (`p8_worksheet.xls`). The worksheet describes the properties and parameters required to complete IBM FileNet P8 installation, upgrade, and configuration programs, and provides a way to record the values you assign to these properties and parameters.

Administrators who are preparing the environment for installation or upgrade of IBM FileNet P8 components must use the worksheet during their preparation tasks to record the appropriate values and provide them to the Installation Administrator who runs the installation or upgrade programs.

Some of the features of the Installation and Upgrade Worksheet are:

- **Instructions**: describes the worksheet and includes a button that runs the Customize Worksheet macro.
- The two highlighted columns, **Property or Parameter** and **ENTER YOUR VALUE HERE**, provide the simplest view of the requirement. The others add identifying information and help you sort and filter the rows usefully.
- The **Role** column assigns each row to an administrator and uses the following acronyms:
  - ITA: Information Technology Administrator
  - ASA: Application Server Administrator
  - DBA: Database Administrator
  - SA: Security Administrator
  - P8A: IBM FileNet P8 Administrator
- Property definitions are contained in the column titled **Description**.
- Some rows, though not all, contain a hyperlink in the **IC help link** column. Click this hyperlink to run a query against the IBM Information Center, which opens with the Search Results pane showing the topics that contain the words in the query phrase. Browse the search results until you have enough information to be able to enter a value in the Worksheet row.

  "Running the Customize Worksheet macro"
  The Customize Worksheet macro lets you extract only those rows that describe your environment.

  "Autofiltering and sorting the Worksheet" on page 4
  There are several ways to organize the Worksheet to make finding properties and entering values easier.

Running the Customize Worksheet macro

The Customize Worksheet macro lets you extract only those rows that describe your environment.

Important: For support of the full range of built-in filter and macro features, use Microsoft Excel to view the Installation and Upgrade Worksheet file. You can use other spreadsheet programs to view the file; however, filter and macro support can vary. For example, in Calc from OpenOffice.Org, the column filters work as expected, but the Customize Worksheet button does not.
To run the Customize Worksheet macro:

1. Open the Installation and Upgrade Worksheet (`p8_worksheet.xls`) and click the **Instructions** worksheet (also called a tab).
2. Scroll down until you see the button representing the Customize Worksheet macro. Click the button.

3. Select the components and options that describe the environment you are preparing for IBM FileNet P8.
   - Installation or Upgrade
   - FileNet P8 Components
   - Application Server type
   - Operating system
   - Database type
   - Directory Server type
   - Number of object stores (adds new sets of rows for creating additional data sources)
   - Name of customized sheet
4. Click **OK**. The macro copies the rows that fulfill your selection criteria into a new worksheet with the name you entered. Enter the values for your environment into this new worksheet.
5. Click the name of the new worksheet at the bottom of the Excel window. Add your preparation values into this new worksheet.
6. Notice that the new worksheet has buttons at the top titled **Show Installer View** and **Show Full View**, depending on its state. The **Show Installer View** displays only those columns that you need while running installation or configuration programs.

Autofiltering and sorting the Worksheet

There are several ways to organize the Worksheet to make finding properties and entering values easier.

AutoFiltering is a quick way to display only those rows that meet a certain criteria. To use AutoFilter:

1. Make sure AutoFiltering is enabled. (Select the entire row with the column headers, then click **Data** > **Filter** > **Autofilter**.) AutoFilter arrows will appear to the right of the column labels.
2. Click the **AutoFilter** arrow in the **Installation or Configuration Program** column header and select the program you are interested in (for example, PE installer).
3. Click the **AutoFilter** arrow in the **Setup Type** column header, select **Custom**, and specify **Setup Type contains Installation**.
4. For a custom AutoFilter, click the **AutoFilter** in any column header, select **Custom**, and specify Setup Type contains “Installation”.
5. To turn off AutoFiltering in a column, click the column **AutoFilter** arrow and select **(All)**.
6. To reorder rows alphabetically, do a Sort:
   a. Click anywhere in a column, for example, Column A Role.

      The only possible values in the Role column are ASA, SA, DBA, ITA, and P8A. Sorting on Role therefore groups the rows by this attribute, in alphabetic order. Several other columns also have a limited number of possible values which means they can be usefully sorted.
   b. Click the **Sort Ascending** icon in the Excel toolbar, or use the **Data** > **Sort** menu command. The rows sort on Role.

      Sorting the Worksheet reassigns row numbers. If you refer to rows by number, be aware that row numbers change if you change the sort order.

Performing required preparation tasks

You must complete all of the required preparation tasks before you start the installation.

Attention: Perform the preparation tasks in this section. Follow the instructions in *Plan and Prepare Your Environment for IBM FileNet P8* for the components you are installing.

To prepare your environment for an IBM FileNet Case Analyzer installation, perform the required preparation tasks for the components you plan to install.

Use the Installation and Upgrade Worksheet for your environment. All administrators must fill out the worksheet with the relevant information as described in "Using the installation and upgrade worksheet" on page 3.

"Installation administrator tasks"
The Installation administrator must prepare Case Analyzer to connect to a single object store or to a Legacy Workflow System and whether to analyze production system data or simulated data.

"IT administrator tasks" on page 6
The IT administrator must prepare the network and operating systems for the Case Analyzer installation.

"Security administrator tasks" on page 7
The Security administrator must prepare the security environment for Case Analyzer including creating user accounts.

"Database administrator tasks" on page 8
The Database administrator must prepare the databases that are required for Case Analyzer including creating database accounts and collecting database information.

Installation administrator tasks

The Installation administrator must prepare Case Analyzer to connect to a single object store or to a Legacy Workflow System and whether to analyze production system data or simulated data.

The Installer administrator must consider the following tasks.

"Planning your installation"
You can install Case Analyzer to connect to a single object store or to a Legacy Workflow System.

"Language support for Case Analyzer" on page 6
Language support for Case Analyzer is fully Unicode enabled to support multiple languages.

Planning your installation

You can install Case Analyzer to connect to a single object store or to a Legacy Workflow System.

The installed IBM FileNet Case Analyzer can process all of the regions in the object store or Legacy Workflow System. You no longer need to install multiple instances of Case Analyzer to process multiple Content Platform Engine databases because the Case Analyzer Publishing Service is now part of Content Platform Engine where you configure the multiple databases.

"Case Analyzer installation use cases"
The Case Analyzer installation use cases can analyze production system data or simulated data.

"Case Analyzer limitations"
Before you start the Case Analyzer installation, you must understand the system limitations that might affect your installation.

Case Analyzer installation use cases:

The Case Analyzer installation use cases can analyze production system data or simulated data.

There are two typical use cases for IBM FileNet Case Analyzer:

- Production Case Analyzer is for analyzing data from a production system. In addition, production Case Analyzer can provide production input data to IBM FileNet Process Simulator.
- Simulation Case Analyzer is for analyzing simulation data. It is populated with the information that it received from Process Simulator.

Case Analyzer limitations:

Before you start the Case Analyzer installation, you must understand the system limitations that might affect your installation.

IBM FileNet P8 does not support:

- Storing both production data and simulation data in the same IBM FileNet Case Analyzer store. Store simulation data in a Case Analyzer store of type Simulation and production data in a Case Analyzer store of type Production.
- Collocating IBM FileNet Process Simulator and Case Analyzer where Case Analyzer is used in a production context. Collocation of Process Simulator and Case Analyzer is supported where Case Analyzer is used in a simulation context.

Language support for Case Analyzer

Language support for Case Analyzer is fully Unicode enabled to support multiple languages.

You can set up IBM FileNet Case Analyzer in any multilingual Content Platform Engine environment to support all languages.

For more information about setting up your non-English environment, see Preparing non-English environments for installing FileNet P8 in *Plan and Prepare Your Environment for IBM FileNet P8*.

IT administrator tasks

The IT administrator must prepare the network and operating systems for the Case Analyzer installation.

The Information Technology administrator must complete the following tasks.

"Ensuring minimum required disk space and temp space for installation" on page 7
Before you begin the Case Analyzer installation, ensure that your system has the required disk space and temp space.

"Configuring Case Analyzer ports"
You must configure the Case Analyzer ports on Windows or UNIX.

"Configuring the time and date"
The FileNet Case Analyzer components must be configured for the same time zone and time of day.

Ensuring minimum required disk space and temp space for installation

Before you begin the Case Analyzer installation, ensure that your system has the required disk space and temp space.

To determine the disk space and temp space requirements for an IBM FileNet Case Analyzer installation, see *IBM FileNet P8 Hardware and Software Requirements*.

Configuring Case Analyzer ports

You must configure the Case Analyzer ports on Windows or UNIX.

To configure IBM FileNet Case Analyzer ports:

1. In the *IBM FileNet P8 Platform Installation and Upgrade Guide*, go to FileNet P8 Ports.
2. Select Content Platform Engine ports to see the required ports for Case Analyzer.
3. Select the link to topics that contain port information for other FileNet P8 system components if needed.

Configuring the time and date

The FileNet Case Analyzer components must be configured for the same time zone and time of day.

Ensure that the following components are in the same time zone and synchronized to the same time:

- Content Platform Engine server (Content Platform Engine)
- Case Analyzer Database server (Case Analyzer database)
- Case Analyzer Analysis Server (OLAP Database) if separate from the Content Platform Engine and Case Analyzer database
- Content Platform Engine database server

Security administrator tasks

The Security administrator must prepare the security environment for Case Analyzer including creating user accounts.

The Security administrator must complete the following tasks.

"Creating required users for run time"
You create or identify the following runtime users as part of the IBM FileNet Case Analyzer configuration only if the user has enabled OLAP integration for the Case Analyzer store.

Creating required users for run time

You create or identify the following runtime users as part of the IBM FileNet Case Analyzer configuration only if the user has enabled OLAP integration for the Case Analyzer store.

OLAP integration can only be enabled for Case Analyzer databases running on Microsoft SQL Server.

the *ca_olap_administrator* must:

- Be a domain Windows user under the following conditions:
  - Case Analyzer database is remote from either the Case Analyzer SSAS Connector or from Microsoft SQL Server Analysis Services.
  - Case Analyzer SSAS Connector is remote from Microsoft SQL Server Analysis Services.
- Be added as a Microsoft SQL Server Login user for the Case Analyzer database with *db_owner* privileges.

  Attention: Ensure that you configure the Microsoft SQL Server Analysis Services service to log in as the *ca_olap_administrator* user.
- Have administrative privileges on the Case Analyzer OLAP database.

Database administrator tasks

The Database administrator must prepare the databases that are required for Case Analyzer including creating database accounts and collecting database information.

The Database administrator must complete the following tasks.

"Creating Case Analyzer database accounts"
Use your database tools to create new or designate existing database accounts for Case Analyzer.

"Prepare for the database installation" on page 11
When preparing for the database installation, consider the following database information.

"Collect the required database information" on page 11
Before you install and configure Case Analyzer, you must collect the database information you are going to need during installation and configuration. Add the information that you collect to the Installation and Upgrade Worksheet.

"Preparing Microsoft SQL Server" on page 11
Plan and prepare your Microsoft SQL Server database for a Case Analyzer installation.

"Preparing Oracle server" on page 14
Plan the Oracle installation and configuration, install the software, and configure database components for IBM FileNet P8 components after reviewing the requirements.

"Preparing DB2 for Linux, UNIX and Windows servers" on page 16
Plan and prepare your IBM DB2® for Linux, UNIX and Windows servers for FileNet P8 installation.

Creating Case Analyzer database accounts

Use your database tools to create new or designate existing database accounts for Case Analyzer.

Accounts are referred to in documentation in the following ways:

- By a display name; for example, Database User Name. An account's display name is how the FileNet P8 user interface, such as a setup program or dialog box, refers to the account. Many accounts have both a display name and a variable.
- By a variable designator; for example *cpe_db_user*, using lower-cased italics and underscores. The variable is intended to show that you must designate your own account to act in the role described by the variable. The variable is the unique identifier for a particular account.

If you see a reference to an account that you do not understand, search the Information Center for that reference.

Create the following users and groups. After the IT Administrator creates operating system users and groups for DB2 databases, you must grant database permissions to those accounts.

"Creating a Case Analyzer database user for DB2 for Linux, UNIX and Windows"
An operating system account on the database server that Case Analyzer uses to access DB2(r) for Linux(r), UNIX(r) and Windows(r) databases containing the GCD and object stores

"Creating a Case Analyzer database user for Oracle"
A database user account that Case Analyzer uses to connect to Oracle databases containing the GCD and object stores.

"Creating a Case Analyzer database user for SQL Server" on page 10
A database user account that Case Analyzer uses to connect to SQL Server databases containing the GCD and object stores.

Creating a Case Analyzer database user for DB2 for Linux, UNIX and Windows:

An operating system account on the database server that Case Analyzer uses to access DB2(r) for Linux(r), UNIX(r) and Windows(r) databases containing the GCD and object stores

After you create the Content Platform Engine database user for DB2 for Linux, UNIX and Windows as described in Creating a Content Platform Engine database user for DB2 for Linux, UNIX, and Windows, you must create the Case Analyzer database administrator user.

To create a Case Analyzer database user for DB2 for Linux, UNIX and Windows:

1. Create the following operating system account:

   Case Analyzer database user for DB2 for Linux, UNIX and Windows

   Unique identifier
   ca_db_administrator

   Description
   The IT administrator (ITA) creates this operating system account, after which the database administrator (DBA) grants it additional database permissions. Separate accounts can be used for each Case Analyzer object store, but are not required.

   Do not create databases with the RESTRICTIVE option.

   Minimum required permissions
   No additional parameters are required other than Content Platform Engine database user permissions.
2. Record this value in your customized Installation and Upgrade Worksheet. To find this property, search the worksheet for instances of *ca_db_administrator*.

Creating a Case Analyzer database user for Oracle:

A database user account that Case Analyzer uses to connect to Oracle databases containing the GCD and object stores.

After you create the Content Platform Engine database user for Oracle as described in Creating a Content Platform Engine database user for Oracle, you must create the Case Analyzer database administrator user.

1. Create the following database account:

   Case Analyzer database user (Oracle)

   Unique identifier
   ca_db_administrator

   Description
   The tablespace owner accounts that Case Analyzer uses to access Oracle. Use one account for the Case Analyzer object store tablespaces.

   Minimum required permissions
   In addition to the Content Platform Engine database user permissions. grant each *ca_db_administrator* the following permission:

   - CREATE PROCEDURE

2. Record this value in your customized Installation and Upgrade Worksheet. To find this property, search the worksheet for instances of *ca_db_administrator*.

Creating a Case Analyzer database user for SQL Server:

A database user account that Case Analyzer uses to connect to SQL Server databases containing the GCD and object stores.

After you create the Content Platform Engine database user for SQL Server as described in Creating a Content Platform Engine database user for SQL Server, you must create the Case Analyzer database administrator user.

1. Create the following database account:

   Case Analyzer database user (SQL Server)

   Unique identifier
   ca_db_administrator

   Description
   The database accounts that Case Analyzer uses to access SQL Server. nt for the GCD and object store databases.

   ca_db_administrator must be a SQL Server account. It does not have to be an account in the configured directory service.

   Minimum required permissions

   In addition to the Content Platform Engine database user permissions, grant each *ca_db_administrator* the following permissions:

   - db_securityadmin
   - Bulk admin

   Add these accounts to SQL Server's master database and grant the public role to each. When you perform the procedure “Configuring the JDBC distributed transaction components”, these accounts will also be granted the SqlJDBCXAUser role.

2. Record this value in your customized Installation and Upgrade Worksheet. To find this property, search the worksheet for instances of *ca_db_administrator*.

Prepare for the database installation

When preparing for the database installation, consider the following database information.

IBM FileNet Case Analyzer uses the following two databases.

Table 1. Databases used by the Case Analyzer

Database	Database name
Case Analyzer database	User defined
Case Analyzer OLAP database This optional database is used when the Case Analyzer Store is using a Microsoft SQL Server database and OLAP integration is enabled.	User defined

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

For best practices, it is recommended that you put the Case Analyzer tables and the Content Platform Engine tables in separate databases to better enable backup and recovery of data.

Collect the required database information

Before you install and configure Case Analyzer, you must collect the database information you are going to need during installation and configuration. Add the information that you collect to the Installation and Upgrade Worksheet.

IBM FileNet Case Analyzer supports publishing to the Microsoft SQL Server, DB2 for Linux, UNIX and Windows, and Oracle databases.

Collect the following database information for your Case Analyzer installation and configuration:

- The dedicated TCP/IP port number of the database instance used by the Case Analyzer
- The name of the database server, if Case Analyzer is configured with a remote database
- The *ca_db_administrator* user ID and password for the Case Analyzer database instance. This ID is the user created in “Creating required users for run time” on page 7
- If you use OLAP integration with Microsoft SQL Server:
  - The name of the Microsoft SQL Server Analysis Services server, if separate from the database server
  - The name of the Microsoft SQL Server Analysis Services instance, if Analysis Services is configured as a named instance

Preparing Microsoft SQL Server

Plan and prepare your Microsoft SQL Server database for a Case Analyzer installation.

Consider the following information when you prepare the Microsoft SQL Server database:

- Create the Case Analyzer OLAP databases before you install Case Analyzer.

  Attention: You need this database only if you intend to enable OLAP integration on the Case Analyzer Store, otherwise it is not required.
- Install the Case Analyzer database and the Case Analyzer OLAP database collocated on the same server or on separate servers.
- Configure the Microsoft SQL Server database for Mixed Mode authentication
- During the Microsoft SQL Server installation, record the values for the following settings. You use this information during the Case Analyzer Engine installation. For more information, see "Installing Case Analyzer components interactively" on page 22 or "Installing Case Analyzer components silently" on page 22.
  - Case Analyzer database
    - Server name
    - Instance name
    - TCP/IP port assigned to the database instances. See "Configuring Case Analyzer ports" on page 7
    - Name and password of the pa_administrator user that Case Analyzer is used to access the database. See "Creating required users for run time" on page 7
  - Microsoft SQL Server Analysis database
    - Analysis Services server name (if separate from Case Analyzer database Server)
    - OLAP instance name

In addition to the following instructions, see the Microsoft SQL Server installation instructions.

To configure Microsoft SQL Server:

1. Select the database collation settings. Specify one of the following:
   - Dictionary order, not case-sensitive, for use with 1252 Character Set (or any not case-sensitive Microsoft SQL Server collation). Not case-sensitive collation is the Microsoft default and the setting most used in IBM 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 Microsoft SQL Server collation). Select case-sensitive Microsoft SQL Server collation only if you know that your site requires searches that must differentiate uppercase from lowercase characters (in property choice lists, folder names, etc.).

   Important: Select your Microsoft 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 not case-sensitive collation after significant user activity. Be aware that if you have a case-sensitive database and you want to perform a not case-sensitive search programmatically or otherwise, you might encounter serious performance degradation on Microsoft SQL Server. The database cannot use column indexes in these cases.
2. Define a static port number.

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

3. Download and install the required Microsoft SQL Server Service Packs, as indicated in *IBM FileNet P8 Hardware and Software Requirements*.
4. Verify that the *ca_olap_administrator* user has been given administrative privileges on the Case Analyzer OLAP server.

   See "Adding a user to the server role in Microsoft SQL Server Analysis Services."

   "Adding a user to the server role in Microsoft SQL Server Analysis Services"
   You must add a user to the server role in Microsoft SQL Server Analysis Services to perform OLAP operations.

   "Enabling Microsoft SQL Server XA transactions"
   Configure the Windows server to enable Microsoft SQL Server XA transactions.

   "Preparing the Microsoft SQL Server client" on page 14
   You can use the Case Analyzer SSAS Connector to access Microsoft SQL Server Analysis Services (SSAS) to perform OLAP operations on Case Analyzer reporting. If the Case Analyzer SSAS Connector is running remote from the Microsoft SQL Server Analysis Services server, the Microsoft SQL Server client must be installed on the Case Analyzer SSAS Connector server.

Adding a user to the server role in Microsoft SQL Server Analysis Services:

You must add a user to the server role in Microsoft SQL Server Analysis Services to perform OLAP operations.

OLAP operations on Excel Reporting and Cognos® Business Intelligence reporting are supported on IBM FileNet Case Analyzer if you are using a Microsoft SQL Server database in a Windows environment. DB2 for Linux, UNIX and Windows and Oracle databases use IBM FileNet Case Monitor for reporting, not Excel Reporting or Cognos Business Intelligence.

This procedure is referenced from "Creating required users for run time" on page 7.

To add the user to the server role in Microsoft SQL Server Analysis Services (SSAS):

1. Open Microsoft SQL Server Management Studio.
2. In the Connect to Server window, connect to the instance of Microsoft SQL Server Analysis Services that you are using.
3. In Object Explorer, right-click your Microsoft SQL Server Analysis Services instance name and select **Properties**.
4. On the Analysis Services Properties page, in the Select a page pane, click **Security**. Users and Groups that are members of the server role appears in a list.
5. Click **Add**.
6. In the Select Users or Groups page, go to the **Enter the object names to select** field and enter *ca_olap_db_administrator* as the name of the account that you are adding to the server role.
7. Click **Check Name** to verify that the account exists.
8. Click **OK**.

Enabling Microsoft SQL Server XA transactions:

Configure the Windows server to enable Microsoft SQL Server XA transactions.

Perform these steps on every Microsoft SQL Server that will contain an IBM FileNet Case Analyzer database.

To enable Microsoft SQL Server XA transactions:

1. From Control Panel, open Administrative Tools, and then open Component Services.
2. Expand Component Services, right-click **My Computer**, and then select Properties.
3. Expand **Distributed Transaction Coordinator** and right-click **Local DTC**.
4. Click the **MSDTC** tab, and then click **Security Configuration**.
5. Select the **Enable XA Transactions** check box, and then click **OK** to restart the Microsoft DTC service.
6. Click **OK** again to close the Properties dialog box, and then close Component Services.
7. Stop and then restart the Microsoft SQL Server.

Preparing the Microsoft SQL Server client:

You can use the Case Analyzer SSAS Connector to access Microsoft SQL Server Analysis Services (SSAS) to perform OLAP operations on Case Analyzer reporting. If the Case Analyzer SSAS Connector is running remote from the Microsoft SQL Server Analysis Services server, the Microsoft SQL Server client must be installed on the Case Analyzer SSAS Connector server.

To install Microsoft SQL Server client on the Case Analyzer SSAS Connector server:

1. Install the Microsoft SQL Server client software.
   a. Log on to the Case Analyzer SSAS Connector server with an account that has local administrator privileges.
   b. Install the Microsoft SQL Server 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 2008 Service Pack, as indicated in the *IBM FileNet P8 Hardware and Software Requirements*.
3. Verify the connection between the Microsoft SQL Server client installation and the database computer using either of the following methods:
   - At a command prompt type:

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

   - Use Microsoft SQL Server Management Tools to test the connection to the Analysis Server.

   If the connection fails, resolve the problem before you proceed.

Preparing Oracle server

Plan the Oracle installation and configuration, install the software, and configure database components for IBM FileNet P8 components after reviewing the requirements.

There are some restrictions when you run IBM FileNet Case Analyzer on an Oracle Server database:

- You can only use the Case Analyzer store for IBM FileNet Case Monitor.
- You cannot enable OLAP integration for the Case Analyzer store.
- You cannot use Case Analyzer SSAS Excel reports or Case Analyzer Cognos Business Intelligence reports.

"Creating an Oracle database"
Create one or more databases, depending on whether one or more IBM FileNet P8 components will share the database.

"Configuring automatic transaction recovery"
In a distributed database environment, Oracle MTS Recovery Service (automatically installed with Oracle Services for Microsoft Transaction Server) can resolve in-doubt transactions on the computer that started the failed transaction.

"Configuring Oracle XA transactions" on page 16
Configure Oracle XA transactions for Case Analyzer by running several Oracle SQL scripts.

Creating an Oracle database:

Create one or more databases, depending on whether one or more IBM FileNet P8 components will share the database.

FileNet P8 requires the following settings for Oracle databases:

Database configuration type
If a database is dedicated to Content Platform Engine Transaction Processing (also known as OLTP) is the required configuration type.

Server process type
Dedicated Server Mode

Database character set
Set the regular character set to AL32UTF8. It is not required to set the national character set (NLS_NCHAR_CHARACTERSET) to a specific value. You can take the default. The national character set applies to the data types NCHAR / NVARCHAR2 / NCLOB which the Content Platform Engine does not use.

Record the values for the Database server name, Database name, and the Database port number in your customized Installation and Upgrade Worksheet. To find these properties, set the Autofilter for Column E **Installation or Configuration Program** for **CM: Configure GCD JDBC Data Sources**. Then set the Autofilter for Column D**ISV Component Vendor** to **Oracle**.

Configuring automatic transaction recovery:

In a distributed database environment, Oracle MTS Recovery Service (automatically installed with Oracle Services for Microsoft Transaction Server) can resolve in-doubt transactions on the computer that started the failed transaction.

- Enable automatic transaction recovery by performing the tasks shown in the Scheduling Automatic Microsoft Transaction Server Recovery section of *Oracle Services for Microsoft Transaction Server Developer's Guide* (Oracle Part Number A95496-01).

- If you are using an Oracle Fail Safe configuration, perform the procedure shown in the Modifying Registry Values for Oracle Fail Safe Configurations section of *Oracle Services for Microsoft Transaction Server Developer's Guide* (Oracle Part Number A95496-01).

Configuring Oracle XA transactions:

Configure Oracle XA transactions for Case Analyzer by running several Oracle SQL scripts.

To configure Oracle XA transactions:

1. Log on the Oracle database as either SYSOPER or SYSDBA.
2. Locate and run the `initxa.sql` script in the `ORACLE_HOME\javavm\install` directory.
3. If the script fails to run because the database memory space is too small, locate and run the `initjvm.sql` script in the `ORACLE_HOME\javavm\install` directory. Additional memory-related parameters might need to be adjusted to successfully run this script.

Preparing DB2 for Linux, UNIX and Windows servers

Plan and prepare your IBM DB2 for Linux, UNIX and Windows servers for FileNet P8 installation.

There are some restrictions when you run IBM FileNet Case Analyzer on a DB2 database:

- You can only use the Case Analyzer store for IBM FileNet Case Monitor.
- You cannot enable OLAP integration for the Case Analyzer store.
- You cannot use Case Analyzer SSAS Excel reports or Case Analyzer Cognos Business Intelligence reports.

The following are planning considerations for DB2 for Linux, UNIX and Windows:

- DB2 for Linux, UNIX and Windows version 9.7 is required for Process Engine to support GB18030 character sets.
- IBM FileNet P8 does not support partitioned DB2 databases or databases created with the RESTRICTIVE clause (or, from the Control Center, with **Restrict access to system catalogs** selected in the Create Database Wizard).
- Determine whether you want to use a dedicated or shared database. In this regard:
  - Content Engine and Process Engine can share a database server, or they can each have a dedicated (unique) database servers.
  - Content Engine and Process Engine can each have a dedicated DB2 instance, or they can share an instance with one another or with non-IBM FileNet P8 applications.
  - Assign unique databases to the Content Engine global configuration database and object stores. Although you can configure multiple Content Engine object stores in a single DB2 database, you should configure each object store in a separate database. If you configure object stores in separate databases, you have more flexibility and control with security access, backup scheduling and execution, updates, and scheduled outages.
  - It is a best practice to create one Process Engine isolated region in a database for simplification of backup, administration, and support activities. Create one isolated region per database and configure separate Process Engine virtual servers for each database.

  - A Content Engine object store and a single Process Engine isolated region can share a database. This configuration is required for new FileNet P8 installations with IBM Case Manager. Where IBM Case Manager will be added to an existing FileNet P8 configuration, this shared database is recommended. The table spaces in the database can optionally be shared.
- Plan to use automatic storage for table spaces. For performance reasons, IBM recommends that you create table spaces using automatic storage, rather than database managed or system managed table spaces for Process Engine and Content Engine.
- Plan to use SERVER authentication.
- Set the DB2 codeset to UTF-8.
- Set the page size to 32 KB.
- Determine the maximum size of the content elements your users store. The size affects setting up database storage areas or file storage areas. When you create an object store, a database storage area is provided by default, allowing you to store content as database BLOBs. You can also create one or more file storage areas to store content on local or remote file systems. If your users store large individual documents or other content elements, use only file storage areas. Otherwise, users can encounter memory-related errors when retrieving or indexing the large content.
- Determine whether the configuration will include IBM DB2 pureScale®. To configure the Process Engine JDBC URL, you will need the names of two pureScale servers as well as the database port.

Important: Controlled tests with limited concurrency exhibited errors when run with files that were 300 MB or larger. Factors affecting this file-size limitation include driver and application server memory demands, other activity such as concurrent retrieval or indexing of large content, and JVM memory allocations.

"Installing DB2 for Linux, UNIX and Windows and creating DB2 instances" Create DB2 for Linux, UNIX and Windows instances for Case Analyzer and set several instance values.

Installing DB2 for Linux, UNIX and Windows and creating DB2 instances:

Create DB2 for Linux, UNIX and Windows instances for Case Analyzer and set several instance values.

To install DB2 for Linux, UNIX and Windows and create DB2 instances:

1. Install the IBM DB2 for Linux, UNIX and Windows software. Make note of the TCP/IP port number assigned to the instance or instances. The port number assigned can be found in the `/etc/services` file, associated with the DB2 instance(s) just created. After a successful installation, the DB2 instance should be up and running.
2. Refer to the *IBM FileNet P8 Hardware and Software Requirements* for required operating-system and database patch sets, and service packs.
3. Content Engine and Process Engine can share an instance, or each engine can have its own instance. Create the appropriate instances if they do not exist.
4. Set TCP/IP as the default protocol.
5. Set the DB2_OPTPROFILE variable to YES.
6. (DB2 version 9.7 only) Set the DB2_WORKLOAD variable to FILENET_CM.

Installing and configuring Case Analyzer

The Case Analyzer services are installed as part of the Content Platform Engine installation. After you install the Content Platform Engine software, you can install the Case Analyzer components by using the IBM Case Foundation installation program.

Restriction: Do not install IBM FileNet Case Analyzer, formerly known as Process Analyzer, unless it is supported at the release levels of your FileNet P8 environment. For information, see the *IBM FileNet P8 Hardware and Software Requirements* and the *IBM FileNet P8 Compatibility Matrix* documents.

This section contains the installation and configuration topics for the Case Analyzer components.

"Enabling Case Analyzer services"
There are no specific installation procedures for the Case Analyzer services because these services are installed as part of Content Platform Engine. After Content Platform Engine is installed, you can enable Case Analyzer services at the domain, site, virtual server or server level.

"Installing Case Analyzer components" on page 20
You can select and install the Case Analyzer components that you want by running the IBM Case Foundation installation wizard. Or you can enter the installation values for the Case Analyzer components into an input response file and run the installation program from a command line.

"Configuring the Case Analyzer SSAS Connector" on page 23
If you installed the Case Analyzer SSAS Connector and plan to access Microsoft SQL Server Analysis Services (SSAS) by using a non-default RMI port, you must configure the Case Analyzer SSAS Connector to use the desired RMI port number. If you choose to use the default RMI port number, no other configuration steps are required.

"Create an initial Case Analyzer store" on page 23
You must create an initial Case Analyzer store. The Case Analyzer services process data from the Content Platform Engine audit and event logs and stores the analytical results to this Case Analyzer store.

"Configuring Case Analyzer components" on page 24
You must configure the Case Analyzer components that you installed.

"Installing Case Analyzer software updates" on page 29
Perform the procedure in this topic for each Case Analyzer instance to install software updates such as a mod release, fix pack, or interim fix.

Enabling Case Analyzer services

There are no specific installation procedures for the Case Analyzer services because these services are installed as part of Content Platform Engine. After Content Platform Engine is installed, you can enable Case Analyzer services at the domain, site, virtual server or server level.

The following software must be installed before you can enable and run IBM FileNet Case Analyzer services:

- IBM Case Foundation

- Case Analyzer SSAS Connector if you plan to use Case Analyzer Excel Reports or Cognos Business Intelligence

Case Analyzer services support publishing to the Microsoft SQL Server, DB2 for Linux, UNIX and Windows, and Oracle databases.

To enable Case Analyzer services in Content Platform Engine:

1. Open IBM Administration Console for Content Platform Engine and select the level at which you want to enable Case Analyzer services.
2. Click the **Workflow Subsystem** tab.
3. Select the **Case Analyzer enabled** option and click **OK**.

For more information about inheritance and hierarchy levels of domain properties, see Inheritance and server hierarchy levels.

Installing Case Analyzer components

You can select and install the Case Analyzer components that you want by running the IBM Case Foundation installation wizard. Or you can enter the installation values for the Case Analyzer components into an input response file and run the installation program from a command line.

You can install the components that are shown in the following table by running the IBM Case Foundation installation program. Note that some of the components can be installed only on Windows.

Table 2. IBM Case Foundation components

Component	Description
IBM Case Foundation	Install this software on a Content Platform Engine to enable full workflow processing capabilities.
Tools	Install the tools on the Content Platform Engine server after installing the Content Platform Engine server. Alternatively, install only the Content Platform Engine tools on a remote workstations, then install the IBM Case Foundation tools.

Table 2. IBM Case Foundation components (continued)

Component	Description
Case Analyzer Components	Choose from the following Case Analyzer components: • Case Monitor Project: integrates with IBM Cognos Real-time Monitoring to monitor the current state of case and workflow processes in near real time. • Cognos Business Intelligence project: generates Cognos Business Intelligence reports for statistical information from Content Platform Engine or Process Simulator • Excel Reports: generates Excel reports for statistical information from Content Platform Engine or Process Simulator • SSAS OLAP Connector: provides access to Microsoft SQL Server Analysis Services (SSAS) to perform OLAP operations on Cognos Business Intelligence reporting The Excel Reports and SSAS OLAP Connector options only appear on Microsoft Windows platforms. See the *IBM FileNet Case Analyzer Installation and Upgrade Guide* for more information.

"Install prerequisite software"
Before you install the Case Analyzer Excel Reports component, verify that the computers and user workstations that run Case Analyzer Excel reports have the required software installed on them.

"Installing Case Analyzer components interactively" on page 22
You can use the installation wizard to install Case Analyzer components interactively.

"Installing Case Analyzer components silently" on page 22
You can install the Case Analyzer components silently by modifying the values in the silent installation response file and running the IBM Case Foundation installation program from a command line.

Install prerequisite software

Before you install the Case Analyzer Excel Reports component, verify that the computers and user workstations that run Case Analyzer Excel reports have the required software installed on them.

All of the workstations that are going to access IBM FileNet Case Analyzer Excel reports must have:

- Microsoft Excel with query analyzer (MS Query) and pivot table support installed.

  For Excel version requirements, see *IBM FileNet P8 Hardware and Software Requirements*. See Microsoft documentation for instructions on how to install and configure Microsoft Excel.
- Microsoft SQL Server add-ons:
  - Microsoft Core XML Services (MSXML)

– The appropriate Microsoft SQL Server Analysis Services OLE DB Provider based on the Analysis version must be installed

The Microsoft SQL Server add-ons are available for download from Microsoft. For details, see *IBM FileNet P8 Hardware and Software Requirements*.

Installing Case Analyzer components interactively

You can use the installation wizard to install Case Analyzer components interactively.

To install IBM FileNet Case Analyzer components interactively:

1. Open your completed Installation and Upgrade Worksheet file that contains the parameter values to specify in the Case Analyzer installation.

   Tip: In the worksheet file, verify that the **Data** > **Filter** > **AutoFilter** is enabled. To view only Case Analyzer values, filter by **CA Components Installer** in the **Installation or Configuration Program** column.
2. Log on as *cpe_install_user* to the computer where you are going to install Case Analyzer components.
3. Access the IBM Case Foundation 5.2.0 software package in the installation media.
4. Run the installation program `5.2.0-P8CaseFoundation-WIN.EXE` to start the installation process.
5. Select the Case Analyzer components that you want to install.
6. Complete the Case Analyzer components installation screens by using the values from your worksheet.
7. When the installation completes, navigate to the `C:\Program Files\IBM\FileNet\Case Foundation` directory.
8. Open the `casefoundation_install_log_5.2.0.txt` log file and check for errors to verify the installation was successful.
9. Continue with "Configuring Case Analyzer components" on page 24.

Installing Case Analyzer components silently

You can install the Case Analyzer components silently by modifying the values in the silent installation response file and running the IBM Case Foundation installation program from a command line.

A sample response file for the IBM FileNet Case Analyzer components installation is provide on the installation media. The file name is `CaseFoundation_silent_install.txt`.

To install Case Analyzer components silently:

1. Open your completed Installation and Upgrade Worksheet file that contains the parameter values to specify in the Case Analyzer installation.

   Tip: In the worksheet file, verify that the **Data** > **Filter** > **AutoFilter** is enabled. To view only Case Analyzer values, filter by **CA Components Installer** in the **Installation or Configuration Program** column.
2. Log on as *cpe_install_user* to the computer where you are going to install Case Analyzer components.
3. Access the IBM Case Foundation 5.2.0 software package in the installation media.

4. Edit the `CaseFoundation_silent_install.txt` file to reflect the installation choices in your worksheet for the Case Analyzer components you want to install.
5. Run the following command at a command prompt: `5.2.0-P8CaseFoundation-WIN.EXE -i silent -f CaseFoundation_silent_install.txt`.
6. When the installation completes, navigate to the `C:\Program Files\IBM\FileNet\Case Foundation` directory.
7. Open the `casefoundation_install_log_5.2.0.txt` log file and check for errors to verify the installation was successful.
8. Continue with "Configuring Case Analyzer components" on page 24.

Configuring the Case Analyzer SSAS Connector

If you installed the Case Analyzer SSAS Connector and plan to access Microsoft SQL Server Analysis Services (SSAS) by using a non-default RMI port, you must configure the Case Analyzer SSAS Connector to use the desired RMI port number. If you choose to use the default RMI port number, no other configuration steps are required.

The IBM FileNet Case Analyzer services that are running on Content Platform Engine use the Java™ Remote Method Invocation (RMI) API to access the Case Analyzer SSAS Connector to perform OLAP operations. By default, the Case Analyzer SSAS Connector uses the RMI port number 32771. If you want to use an RMI port number other than the default port number, you must complete the following steps.

To configure the RMI port number on the Case Analyzer SSAS Connector:

1. Go to the Case Analyzer components installation directory. The default location is`C:\Program Files (x86)\IBM\FileNet\Case Foundation\Case Analyzer components\SSAS OLAP Connector\jpa`.
2. Open the `olapconnector.properties` file.
3. Edit the **`analyzer.rmiPortNumber`** parameter to contain the RMI port number that you want the Case Analyzer SSAS Connector to use.
4. Save the change and close the `olapconnector.properties` file.
5. Restart the Case Analyzer SSAS Connector.

Create an initial Case Analyzer store

You must create an initial Case Analyzer store. The Case Analyzer services process data from the Content Platform Engine audit and event logs and stores the analytical results to this Case Analyzer store.

When creating an IBM FileNet Case Analyzer store, you can either reuse an existing database connection. If your store must have its own database, you must follow the same procedures required for creating the initial store. If you are reusing an existing database connection, you can run the Case Analyzer store wizard without any further preparations. For more information, see Creating a database connection.

If you plan to use Case Analyzer Excel reports or Cognos Business Intelligence project, the Case Analyzer SSAS Connector must be installed and configured on your system. Then you must enable OLAP integration in the Case Analyzer store.

The Case Analyzer store wizard leads you through the steps required to create an object store. Follow the steps described in Creating a Case Analyzer Store to create an initial store for Case Analyzer.

Configuring Case Analyzer components

You must configure the Case Analyzer components that you installed.

Before you can use IBM FileNet Case Analyzer, you must create an initial Case Analyzer object store and complete the configuration procedures for the installed components.

"Granting access rights to the Case Analyzer OLAP database"
Before a user can run Excel reports and Cognos Business Intelligence reports for Case Analyzer, you must grant that user access to the Case Analyzer OLAP database.

"Configuring Excel Reports for Case Analyzer" on page 25
If you installed the Excel Reports component, you must configure it to generate reports from statistical information gathered from the Content Platform Engine or Process Simulator.

"Configure Cognos Business Intelligence project for Case Analyzer" on page 26
If you installed the Cognos Business Intelligence project component, you must configure it to generate reports from statistical information gathered from the Content Platform Engine or Process Simulator.

"Configure Case Monitor project for Case Analyzer" on page 29
If you installed the Case Monitor project component, you must configure it to integrate with IBM Cognos Real-time Monitoring to monitor the current state of case and workflow processes.

Granting access rights to the Case Analyzer OLAP database

Before a user can run Excel reports and Cognos Business Intelligence reports for Case Analyzer, you must grant that user access to the Case Analyzer OLAP database.

Use the Microsoft SQL Server Management Studio to create roles and assign users. See the online help for Microsoft SQL Server for more information and detailed instructions.

Attention: Users who want to access reports must belong to the same domain as the Microsoft SQL Server Analysis server. If a user does not belong to this same domain, one option is to create a matching local user on the Microsoft SQL Server Analysis server and assign the local user permissions to the Case Analyzer OLAP database.

Important: Use this procedure only as a guide to creating roles because security requirements differ at each site.

To grant access rights to the Case Analyzer OLAP database:

1. Go to **Start** > **All Programs** > **Microsoft SQL Server 2008** > **SQL Server Management Studio**.
2. Connect to your analysis services instance.
3. Expand **Databases** > **OLAP_database_name**.

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

4. Right-click **Roles** and select **New Role...**.
5. Give the user access to the OLAP cubes.
   a. Enter the Role Name and Description. For example, enter a descriptive name for the role and describe how that role is used in the Description field.
   b. Set the database permissions for this role to be Full control (Administrator).
   c. Select the **Membership** tab.
   d. Click **Add** and select the domain user or group of users that you wish to give access to the Case Analyzer OLAP database.
   e. Click **Add**. If you want to add more than one user or group, you must add them separately by repeating the previous 3 steps.
   f. Click **OK**.
   g. Click **OK**.

Configuring Excel Reports for Case Analyzer

If you installed the Excel Reports component, you must configure it to generate reports from statistical information gathered from the Content Platform Engine or Process Simulator.

Instead of storing the reports on each individual server, you can make them available to remote workstations in different ways. You can share the drive where the reports are located on the network. You can save the reports to a network drive or save the reports to an object store. If you take one of these actions, you must:

- Verify that the prerequisite software is installed on the workstation of each user. See "Install prerequisite software" on page 21.
- Point the users to the location of the reports.
- Point the users to the *IBM FileNet Case Analyzer Installation and Upgrade Guide*. See the IBM FileNet P8 Help topic **Integrating workflow into document management** > **IBM FileNet Case Analyzer User Guide**

To configure Excel Reports for Case Analyzer:

1. Log in as a *ca_client_database_user*.
2. Start the Case Analyzer Configuration Tool, go to **Start** > **All Programs** > **IBM FileNet P8 Platform** > **Case Analyzer components** > **Case Analyzer Client Configuration Tool**.
3. Enter the name of the Case Analyzer Analysis Server where the Case Analyzer OLAP database is located.

   Depending on whether the Content Platform Engine has a local or remote OLAP database, your entry is the name of:

   - the server where the Content Platform Engine Engine software was installed or
   - the remote OLAP database server used by the Content Platform Engine

   Important: In highly available environments, use the virtual IP or name of the SQL Server Analysis Services server.
4. Select the Database Version for Case Analyzer Analysis Services:
   - Microsoft SQL Server 2008
   - Microsoft SQL Server 2008 R2
   - Microsoft SQL Server 2012

5. Enter the Database Name for Case Analyzer Analysis Services or the OLAP database name.
6. Enter the Analysis Services Instance Name.

   Tip: This field requires a value only when installing on SQL Server with a non-default Analysis Service. If you are installing on SQL Server with the default instance, you can leave the field empty.
7. Verify that the folder where you store your reports is listed in the **Root Report Folder** field. By default, the field contains the location where installation installed the out-of-box reports. If your reports are stored in another folder, enter the path to that folder here.
8. Click **Configure**. The Case Analyzer Client Configuration Tool configures the out-of-box reports. It configures the data connection in all Excel spreadsheets in all folders one level below the indicated folder. The progress of the configuration displays in the **Results** box.

   Tip: Following configuration, on the Case Analyzer components computer you can view the sample reports or create new reports. For details, see the FileNet P8 Help topic **Integrating workflow into document management** > **Workflow Analysis reports**
9. Select **File** > **Exit** to close the Case Analyzer Client Configuration Tool.

Configure Cognos Business Intelligence project for Case Analyzer

If you installed the Cognos Business Intelligence project component, you must configure it to generate reports from statistical information gathered from the Content Platform Engine or Process Simulator.

Perform the following procedures on the IBM Cognos Business Intelligence server to configure Cognos Business Intelligence project to run IBM FileNet Case Analyzer reports.

"Installing prerequisite software for IBM Cognos Business Intelligence" on page 27
You must install the required Microsoft SQL Server add on software to run IBM Cognos Business Intelligence reports on Case Analyzer.

"Deploying Case Analyzer reports on IBM Cognos Business Intelligence" on page 27
You must configure the IBM Cognos Business Intelligence server to deploy Case Analyzer reports.

"Updating the DataSource connection" on page 27
By default, the Case Analyzer DataSource connection is configured for the localhost Analysis server. If you are using another Analysis server, you can update the DataSource connection to point to that Analysis server.

"Updating the OLAP database name" on page 28
By default, the Case_Analyzer_Reports package communicates with OLAP databases named CAOLAPDB. You can update the Reports package to run your reports on a different OLAP database.

"Viewing the reports" on page 28
After you create a Case_Analyzer_Reports package, you can view the reports that are generated from that package.

Installing prerequisite software for IBM Cognos Business Intelligence

You must install the required Microsoft SQL Server add on software to run IBM Cognos Business Intelligence reports on Case Analyzer.

The IBM FileNet Case Analyzer user workstations that run IBM Cognos Business Intelligence reports must have the Microsoft Analysis Services 10.0 OLE DB Provider for Microsoft SQL Server running on them. The appropriate package for the version of the SQL Server must be installed.

Tip: This add-on is available for download from Microsoft. For details, see *IBM FileNet P8 Hardware and Software Requirements*.

If the OLAP Microsoft SQL Server database is remote from the IBM Cognos Business Intelligence server, the Microsoft SQL Server Client software must be installed on the IBM Cognos Business Intelligence server.

You must also grant access rights to the Case Analyzer OLAP database. See "Granting access rights to the Case Analyzer OLAP database" on page 24 for more information.

Deploying Case Analyzer reports on IBM Cognos Business Intelligence

You must configure the IBM Cognos Business Intelligence server to deploy Case Analyzer reports.

To deploy IBM FileNet Case Analyzer reports on IBM Cognos Business Intelligence:

1. Open the IBM Cognos Welcome page:
   a. Start your Web browser.
   b. In the address bar, type the URL supplied by your administrator and press **Enter**. The URL looks like: *http://<servername>/cognos8* where *servername* is the name of your IBM Cognos Business Intelligence server.
2. Click **Administer IBM Cognos Content**.
3. Click the **Configuration** tab and select **Content Administration**.
4. Click **New Import**.
5. Select **Case_Analyzer_Reports** and click **Next**.
6. Accept the default name **Case_Analyzer_Reports** and click **Next**.
7. Check the **Case_Analyzer_Reports** and click **Next**.
8. Accept the default values at the following screens and click **Finish**.
9. In the Select when you want to run this import screen, click **Run**.
10. Check **View the details of this import after closing this dialog** and click **OK**.
11. Click **Refresh** to display the results of your imports.

Updating the DataSource connection

By default, the Case Analyzer DataSource connection is configured for the localhost Analysis server. If you are using another Analysis server, you can update the DataSource connection to point to that Analysis server.

To update the DataSource connection:

1. From **IBM Cognos Administration**, select the **DataSource Connections** link and click **Refresh** to display a Case_Analyzer_DataSource.

2. Click the link for **Case_Analyzer_DataSource**.
3. Check **Case_Analyzer_DataSource** and click **More**.
4. Click the **Set Properties** link.
5. Select the **Connection** tab.
6. Click on the edit pencil to update the connection string to point to the analysis server.
7. Change the **Server name** property to the analysis server name and click **OK**.
8. Click **OK**.

Updating the OLAP database name

By default, the Case_Analyzer_Reports package communicates with OLAP databases named CAOLAPDB. You can update the Reports package to run your reports on a different OLAP database.

If your OLAP database is not named CAOLAPDB, you can configure the Case_Analyzer_Reports package to use your database name and redeploy the package.

Attention: If your OLAP database is named CAOLAPDB, you can skip these steps.

To update and redeploy the Reports package:

1. Go to the `Case_Analyzer_Project` directory and open the `Model.xml` file.
2. Go to the `<namespace = "en">Model</name>` tag.
3. Rename all occurrences of CAOLAPDB to the name of your OLAP database and press **Enter**.
4. Open an IBM Cognos 8 Framework Manager and select **Open a project**.
5. Open the Case_Analyzer_Project file (Case_Analyzer_Project.cpf).
6. Click on the **Packages** node and select **Case_Analyzer_Reports**.
7. Right click on **Case_Analyzer_Reports** and select **Publish Packages**.
8. Check **Enable model versioning** and **Delete all previous model versions**.
9. Click **Publish** at the last screen in the wizard.
10. At the **Do you wish to publish this package** prompt, click **Yes**.
11. Save the package and exit IBM Cognos 8 Framework Manager.

Viewing the reports

After you create a Case_Analyzer_Reports package, you can view the reports that are generated from that package.

To view reports from the Case_Analyzer_Reports package:

1. Open the IBM Cognos Welcome page:
   a. Start your Web browser.
   b. In the address bar, type the URL supplied by your administrator and press **Enter**. The URL looks something like: *http://<servername>/cognos* where *servername* is the name of your IBM Cognos Business Intelligence server.
2. Click **Administer Cognos**.
3. Select **Launch** > **Report Studio** and click **Content_Analyzer_Reports**.
4. Click **Open an existing report or template**.
5. Select the folder from which you want to retrieve the report.
6. Select the wanted report and click **Open**.

7. Click **OK**.
8. Click **OK** again.
9. From the top-level menu, select **Run** > **Run Report - HTML**.

Configure Case Monitor project for Case Analyzer

If you installed the Case Monitor project component, you must configure it to integrate with IBM Cognos Real-time Monitoring to monitor the current state of case and workflow processes.

Perform the general procedures that are described in the ../com.ibm.p8.prmonitor.doc/gs_get_started.dita section of the Information Center to ensure that the required applications are running and the pre-configured Case Monitor objects are imported to your IBM Cognos Real-time Monitoring installation.

If you plan to implement IBM Case Manager solutions, Case and Task objects are provided for your use. You can continue to monitor workflows and work items with the provided Workflow and Work Item objects.

Installing Case Analyzer software updates

Perform the procedure in this topic for each Case Analyzer instance to install software updates such as a mod release, fix pack, or interim fix.

To install the IBM FileNet Case Analyzer software updates:

1. To obtain the latest Case Analyzer software updates, and to determine whether additional interim fixes are needed, contact your service representative.
2. Open the readme files for the Case Analyzer software updates and perform the installation procedures in the readme files on each Case Analyzer instance.

Planning and preparing for upgrade

This section provides instructions for preparing your system to upgrade IBM FileNet Case Analyzer, formerly known as Process Analyzer.

"Planning the upgrade"
This section provides upgrade details and links to help you prepare your environment for the Case Analyzer upgrade. Review this information thoroughly before you start to upgrade Case Analyzer or required vendor software.

"Performing required preparation tasks" on page 32
You must complete all of the required preparation tasks before you start the upgrade.

Planning the upgrade

This section provides upgrade details and links to help you prepare your environment for the Case Analyzer upgrade. Review this information thoroughly before you start to upgrade Case Analyzer or required vendor software.

The upgrades described in this guide assume that you retain your basic platform configuration from the previous release and that you have already upgraded FileNet P8 to 5.2.

If you need full access to all case and simulation data immediately after the FileNet P8 upgrade, you can upgrade IBM FileNet Case Analyzer and IBM FileNet Process Simulator at the same time . However, to accommodate system resources and schedules, you can also upgrade these components at a later time, such as the following weekend. All backlogged data is processed after those upgrades are complete. See the *IBM FileNet Process Simulator Installation and Upgrade Guide* for information on upgrading that component.

"Supported upgrade paths"
Before you upgrade Case Analyzer, you must determine which platforms are supported and update your independent software vendor software to the appropriate patch level.

Supported upgrade paths

Before you upgrade Case Analyzer, you must determine which platforms are supported and update your independent software vendor software to the appropriate patch level.

Determine the supported platforms for this IBM FileNet Case Analyzer upgrade and update your software to the appropriate patch level.

- See the *IBM FileNet P8 Hardware and Software Requirements* document for the version numbers of product platforms supported for use with IBM FileNet Case Analyzer 5.2.
- Before you upgrade your FileNet software, update your independent software vendor (ISV) software to the patch and Service Pack levels that FileNet supports.

Performing required preparation tasks

You must complete all of the required preparation tasks before you start the upgrade.

Attention: In addition to the following preparation tasks listed, follow the instructions in *Plan and Prepare Your Environment for IBM FileNet P8* for the components you are installing.

To prepare your environment for an IBM FileNet Case Analyzer installation:

- Perform the required preparation tasks for the components you plan to install.
- Use the Installation and Upgrade Worksheet for your environment. All administrators must fill out the worksheet with the relevant information as described in "Using the installation and upgrade worksheet" on page 3.

  "Installation administrator tasks"
  The Installation administrator must prepare for the Case Analyzer upgrade by verifying the supporting software and the core platform support levels.

  "IT administrator tasks" on page 33
  The IT administrator must prepare the system for the Case Analyzer upgrade by backing up the existing Case Analyzer Engine and disabling any scheduled tasks on the Case Analyzer server.

  "Security administrator tasks" on page 34
  IBM FileNet Case Analyzer upgrades do not require any actions by the Security administrator.

  "Database administrator tasks" on page 34
  The Database administrator must prepare the databases that are required for Case Analyzer by gathering pertinent database information and enabling XA transactions for Microsoft SQL Server or Oracle.

  "IBM FileNet P8 administrator upgrade tasks" on page 35
  The FileNet P8 administrator must carry out several tasks to prepare your environment for your IBM FileNet Case Analyzer upgrade.

Installation administrator tasks

The Installation administrator must prepare for the Case Analyzer upgrade by verifying the supporting software and the core platform support levels.

The following topic describes how to verify and upgrade core platform software for an IBM FileNet Case Analyzer upgrade.

"Verifying the core platform components support levels"
Before you start the Case Analyzer upgrade, verify and upgrade the core platform support levels that are described in this topic.

Verifying the core platform components support levels

Before you start the Case Analyzer upgrade, verify and upgrade the core platform support levels that are described in this topic.

The core platform support levels for a IBM FileNet Case Analyzer upgrade are:

- You must upgrade and configure the core platform components, IBM FileNet Content Engine, IBM FileNet Process Engine, and IBM FileNet Application Engine before starting the Case Analyzer upgrade.

  For more information, see *IBM FileNet P8 Hardware and Software Requirements*.
- You must upgrade Case Analyzer before you upgrade Process Simulator.

- You can upgrade to Case Analyzer 5.2 from Case Analyzer (formerly known as Process Analyzer) versions 4.5.0, 4.5.1, and 5.0.

Important: Apply the required minimum level of Case Analyzer patches to the currently installed software before you upgrade. FileNet P8 patches and fix packs often include feature updates that are required to ensure a successful upgrade. Therefore, before you begin your upgrade to Case Analyzer 5.2, you must have applied the minimum level of fix packs to your installed 4.x and 5.0 components. For more details, see *IBM FileNet P8 Hardware and Software Requirements*.

IT administrator tasks

The IT administrator must prepare the system for the Case Analyzer upgrade by backing up the existing Case Analyzer Engine and disabling any scheduled tasks on the Case Analyzer server.

The Information Technology administrator must perform the following tasks.

"Ensuring minimum required disk space and temp space for installation"
Your system must meet the disk space and temp space requirements for a Case Analyzer upgrade.

"Backing up the Case Analyzer Engine"
Make sure that the site has restorable backups of the system and data for all IBM FileNet Case Analyzer and IBM FileNet Process Engine components. In an emergency, you might have to back out of the upgrade.

"Disabling scheduled tasks on the Case Analyzer server" on page 34
Before you start the upgrade, you must disable some of the tasks that are scheduled to run on the Case Analyzer server.

Ensuring minimum required disk space and temp space for installation

Your system must meet the disk space and temp space requirements for a Case Analyzer upgrade.

To ensure that your system has the required disk space and temp space for an IBM FileNet Case Analyzer installation, see the Case Analyzer requirements section in *IBM FileNet P8 Hardware and Software Requirements*.

Backing up the Case Analyzer Engine

Make sure that the site has restorable backups of the system and data for all IBM FileNet Case Analyzer and IBM FileNet Process Engine components. In an emergency, you might have to back out of the upgrade.

For details on what to back up for FileNet P8 components, see the IBM FileNet P8 Help topic **Administering IBM FileNet P8** > **Backing up and restoring IBM FileNet P8 components**.

Back up the following items:

- The database used by Process Engine to which this Case Analyzer Engine is connected.
- The Case Analyzer SQL database.
- The `analyzer.properties` file. Default location: `C:\Program Files\Filenet\Process Analyzer Engine\jpa`.
- The Analysis Server 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 Analysis Manager online help for more information and detailed instructions on creating roles and assigning users.

Disabling scheduled tasks on the Case Analyzer server

Before you start the upgrade, you must disable some of the tasks that are scheduled to run on the Case Analyzer server.

Disable the following scheduled tasks on theIBM FileNet Case Analyzer server:

1. Scheduled automated backups
2. Virus scanning

Security administrator tasks

IBM FileNet Case Analyzer upgrades do not require any actions by the Security administrator.

Database administrator tasks

The Database administrator must prepare the databases that are required for Case Analyzer by gathering pertinent database information and enabling XA transactions for Microsoft SQL Server or Oracle.

The Database administrator must complete the following tasks.

"Verifying that the Oracle listener is running"
If your IBM FileNet Process Engine uses an Oracle database, verify that the Oracle listener is running on the Process Engine database server.

"Gathering database information"
Before you can upgrade Case Analyzer, you must gather the database information that is required for the upgrade.

"Enabling Microsoft SQL Server XA transactions" on page 35
Configure the Windows server to enable Microsoft SQL Server XA transactions.

"Configuring Oracle XA transactions" on page 35
Configure Oracle XA transactions for Case Analyzer by running several Oracle SQL scripts.

Verifying that the Oracle listener is running

If your IBM FileNet Process Engine uses an Oracle database, verify that the Oracle listener is running on the Process Engine database server.

This requirement is only intended for Oracle databases.

Gathering database information

Before you can upgrade Case Analyzer, you must gather the database information that is required for the upgrade.

You need the following database information for the IBM FileNet Case Analyzer upgrade:

- Your current Database Instance Names, NLS, and character set configurations
- The dedicated TCP/IP port number of the database instance that Case Analyzer uses

To determine the TCP/IP port number for Microsoft SQL Server:

1. Open Microsoft SQL Server Enterprise Manager and display the database instance properties.
2. On the **General** tab, click **Network Configuration**.

3. Select **TCP/IP** in **Enabled protocols**.
4. Click **Properties**.

Enabling Microsoft SQL Server XA transactions

Configure the Windows server to enable Microsoft SQL Server XA transactions.

Perform these steps on every Microsoft SQL Server that will contain anIBM FileNet Case Analyzer database.

To enable Microsoft SQL Server XA transactions:

1. From Control Panel, open Administrative Tools, and then open Component Services.
2. Expand Component Services, right-click **My Computer**, and then select Properties.
3. Expand **Distributed Transaction Coordinator** and right-click **Local DTC**.
4. Click the **MSDTC** tab, and then click **Security Configuration**.
5. Select the **Enable XA Transactions** check box, and then click **OK** to restart the Microsoft DTC service.
6. Click **OK** again to close the Properties dialog box, and then close Component Services.
7. Stop and then restart the Microsoft SQL Server.

Configuring Oracle XA transactions

Configure Oracle XA transactions for Case Analyzer by running several Oracle SQL scripts.

To configure Oracle XA transactions:

1. Log on the Oracle database as either SYSOPER or SYSDBA.
2. Locate and run the `initxa.sql` script in the `ORACLE_HOME\javavm\install` directory.
3. If the script fails to run because the database memory space is too small, locate and run the `initjvm.sql` script in the `ORACLE_HOME\javavm\install` directory. Additional memory-related parameters might need to be adjusted to successfully run this script.

IBM FileNet P8 administrator upgrade tasks

The FileNet P8 administrator must carry out several tasks to prepare your environment for your IBM FileNet Case Analyzer upgrade.

Review all rows assigned to the FileNet P8 Administrator (P8A) in the Installation and Upgrade Worksheet. While you complete the following preparation tasks, provide values for the rows that are appropriate to your installation.

Tip: With the **Data** > **Filter** > **AutoFilter** command enabled, as it is by default in the shipping worksheet file (`p8_worksheet.xls`), perform the following actions to quickly see only the properties assigned to a particular role:

- Click the **AutoFilter** drop-down arrow in the **Role** column header and select **P8A**.
- Further filter the result set by clicking the **AutoFilter** drop-down arrow in any of the other columns and selecting a value or clear a filter by selecting **All**.

"Collecting settings for caupgrade wizard"
Collect the values for all settings in the caupgrade wizard. These values are needed for all Case Analyzer upgrades.

Collecting settings for caupgrade wizard

Collect the values for all settings in the caupgrade wizard. These values are needed for all Case Analyzer upgrades.

During the upgrade of IBM FileNet Case Analyzer, you will run caupgrade. After providing information to the caupgrade program, you run the program to upgrade the Case Analyzer database. You can provide the values to caupgrade in a wizard or in a property file that is an input file to the caupgrade program. The information you must gather varies depending on whether you are upgrading from Version 5.1.0, 5.0, 4.5.0 or 4.5.1.

The following table shows the information that is required and where to collect it on the source Case Analyzer system. Several values are not on the source system but are needed for the upgrade. For each property name, record the value in your Installation and Upgrade Worksheet. Property names in this table reflect the name in the caupgrade wizard user interface.

Property name	Description	Comments
Case Analyzer database	Case Analyzer database configuration information.	N/A
• Repository name	A unique name that you assign to the Case Analyzer Store. For example, you can use `CAStore`.	Do not use the Case Analyzer database name.
• Object Store	When you select **Object Store** as the event source, the name of the object store from which to retrieve data.	Select the object store that you created for the Case Analyzer upgrade.
• Event Source: Legacy Workflow System	When you select **Legacy Workflow System** as the event source, the name of the legacy workflow system from which to retrieve data.	Select the legacy workflow system for which you created a connection point for the Case Analyzer upgrade.
Case Analyzer connection information	Case Analyzer schema and connection configuration information.	N/A
• Database schema name	The name of the Case Analyzer database schema in the database that is specified in the **Repository name** field.	Default is dbo for most installations
• Database connection name (use existing connection)	The existing connection name from the drop down menu.	N/A
• Database connection name (define a new connection)	The name assigned to the connection between the Case Analyzer database and Content Platform Engine.	N/A

Property name	Description	Comments
• Database source name	If the Case Analyzer database is shared with an object store, the data source name of the object store.	The name you enter in the Case Analyzer Repository Upgrade Wizard must match the data source name that you defined in Configuration Manager (CMUI).
• XA data source name	If the Case Analyzer database is shared with an object store, the XA data source name of the object store.	The name you enter in the Case Analyzer Repository Upgrade Wizard must match the data source name that you defined in Configuration Manager (CMUI).
Case Analyzer OLAP database	Case Analyzer OLAP integration configuration information.	N/A
• Database host	The host name of the Case Analyzer database server.	Based on the version from which you are upgrading. Process Task Manager - Case Analyzer or Process Analyzer database tab
• Database instance	The instance of the Case Analyzer database.	
• Database name	The name of the Case Analyzer OLAP database.	Based on the version from which you are upgrading. Process Task Manager - Case Analyzer or Process Analyzer database tab
• Database user name	The Windows name of the user who has permission to connect to the Case Analyzer OLAP database.	You can use the *ca_administrator* user that was configured for the Case Analyzer Windows service.
• Database user password	The password for the Case Analyzer OLAP database user name.	N/A
• Database user domain	The domain for the Case Analyzer OLAP database user.	N/A
• Connector host	The host name of the Case Analyzer SSAS Connector server.	N/A
• Connector port	The port number that is used by the Case Analyzer SSAS Connector server.	Default value is 32771

Property name	Description	Comments
Case Analyzer analyzer.properties file	For a Case Analyzer 5.x upgrade, navigate to `C:\Program Files (x86)\IBM\FileNet\Case Analyzer Engine\jpa` For a Process Analyzer 4.5.x upgrade, navigate to `C:\Program Files (x86)\IBM\FileNet\Process Analyzer Engine\jpa` Copy the `analyzer.properties` file to a location that can be accessed by the caupgrade wizard.	

Upgrade and configure Case Analyzer

In the 5.2 release, the Case Analyzer Engine is installed as part of Content Platform Engine. To upgrade Case Analyzer, you must create data spaces for the database connections and update the Case Analyzer databases.

Complete the following tasks to upgrade IBM FileNet Case Analyzer from 4.5.0, 4.5.1, or 5.0.0 to version 5.2:

- Upgrade the IBM FileNet P8 platform to version 5.2
- Open Process Task Manager and collect information that you need to update the Case Analyzer databases. For more information, see "Collecting settings for caupgrade wizard" on page 36.
- Uninstall or disable the Case Analyzer Engine
- Go to `C:\Program Files (x86)\IBM\FileNet\Case Analyzer\jpa` or `C:\Program Files (x86)\IBM\FileNet\Process Analyzer\jpa` and copy the `analyzer.properties` file to a location that can be accessed by the caupgrade wizard
- Create the data sources for the connections to the database
- Run the IBM Case Foundation installation program to install and configure the SSAS OLAP Connector
- Launch the caupgrade wizard and update the databases
- Set the **Analysis Exporter Enable** flag on the domain to **`true`** in the Administration Console for Content Platform Engine and restart the application server
- Process the OLAP cubes using the Process Task Manager or schedule the processing of cubes in the Administration Console for Content Platform Engine

"Uninstalling or disabling Case Analyzer Engine"
You must either uninstall or disable the existing Case Analyzer Engine before you can upgrade Case Analyzer.

"Creating data sources for Case Analyzer databases" on page 40
You must create JDBC data sources for each database that Case Analyzer uses. Content Platform Engine and the caupgrade tool use this data source information to connect to and update the database.

"Creating the Case Analyzer upgrade property file and upgrading the database" on page 41
You can create the Case Analyzer upgrade property file and upgrade the database interactively or manually.

"Installing Case Analyzer software updates" on page 43
Perform the procedure in this topic for each Case Analyzer instance to install software updates (mod release, fix pack, or interim fix).

Uninstalling or disabling Case Analyzer Engine

You must either uninstall or disable the existing Case Analyzer Engine before you can upgrade Case Analyzer.

For software requirements for the IBM FileNet Case Analyzer components and other tools such as MS Excel, see the *IBM FileNet P8 Hardware and Software Requirements* document.

To uninstall or disable the Case Analyzer Engine:

1. Uninstall Case Analyzer Engine.
   a. On the Case Analyzer Engine server, go to **Start** > **Settings** > **Control Panel** and then double-click **Add/Remove Programs**.
   b. Select **FileNet Case Analyzer Engine** from the list of installed programs and click **Change/Remove**.
   c. Click **Yes** to confirm you want to remove the existing Case Analyzer Engine.
   d. Click **OK** when the Uninstallation program is finished.
   e. Close the Add/Remove Programs snap-in.
   f. Close the Control Panel.
2. Disable Case Analyzer Engine:
   a. Stop the Case Analyzer Services Manager.
   b. Access the properties for the Case Analyzer server in the administration console.
   c. In the **Status** field, select **Disabled**.
   d. Save your changes.

Creating data sources for Case Analyzer databases

You must create JDBC data sources for each database that Case Analyzer uses. Content Platform Engine and the caupgrade tool use this data source information to connect to and update the database.

Be sure that you have available the Installation and Upgrade Worksheet that was completed during your planning activities.

To configure the JDBC settings for Case Analyzer databases:

1. Open your completed Installation and Upgrade Worksheet file.

   Tip: In the worksheet file, verify that the **Data** > **Filter** > **AutoFilter** command is enabled. To view only Content Platform Engine values, filter by **CM:Configure Case Analyzer JDBC Data Sources (database 1)** in the **Installation or Configuration Program** column.
2. If your configuration profile is not open in Configuration Manager, open it by selecting **File** > **Open** and navigating to your *profilename*.cfgp file.
3. Create a task for the Case Analyzer JDBC data source.

   Tip: If the Case Analyzer database data sources you are creating share common information such as database server and port, you can copy an existing Configure Object Store JDBC Data Sources task and edit it instead of entering the information again.
   a. Right-click any ***task name*** in the profile pane, such as **Configure Object Store JDBC Data Sources**, and select **Add New Task** > **Configure JDBC Data Sources**. The **New_Configure JDBC Data Sources** task is added to the profile.
   b. Right-click **New_Configure JDBC Data Sources**, and select **Rename Task**.
   c. Enter a useful name for the task, such as **Configure Case Analyzer database 2 JDBC Data Sources**.
   d. Click **OK**.
4. Right-click the **Configure Case Analyzer database 2 JDBC Data Sources** task in the profile pane, and select **Edit Selected Task**.

5. Enter the property values for the JDBC data sources for the database by using the values in your worksheet.
6. Select **File** > **Save** to save your changes.
7. Optional: WebSphere® and WebLogic only. Click **Test Database Connection** to test the connection to the database by using the database user name, database server name, database name, port number, and password that you provided. The test does not create the data sources.
8. Ensure that the task is enabled. When the task is disabled, the task name includes the text **(disabled)**. To enable the task, right-click **Configure Case Analyzer 2 JDBC Data Sources (disabled)** in the profile pane, and choose **Enable Selected Task** from the context menu.
9. Apply the JDBC property settings by right-clicking **Configure database 2 JDBC Data Sources** in the profile pane, and selecting **Run Task**. Running the configuration task can take a few minutes. The task execution status messages are displayed in the Console pane below the bootstrap properties.
10. (JBoss only) Start the application server instance.
11. Repeat this procedure to add the data sources for each Case Analyzer database in your environment.

Creating the Case Analyzer upgrade property file and upgrading the database

You can create the Case Analyzer upgrade property file and upgrade the database interactively or manually.

You can create the upgrade property files interactively by using the caupgrade wizard. When you complete the wizard, review your values and exit the wizard. The upgrade starts automatically.

The alternative is to create the upgrade property file by manually editing the file and manually starting the upgrade. For upgrades from IBM FileNet Case Analyzer version 5.0, create a property file and run the upgrade once for each Case Analyzer database. You can run multiple copies of caupgrade simultaneously.

"Creating the Case Analyzer upgrade properties file and starting the upgrade with the GUI"
Start the caupgrade wizard and set upgrade configuration parameters for an upgrade. After providing input to the wizard screen, you finish the wizard and start the upgrade.

"Creating the Case Analyzer upgrade properties file manually and running the upgrade" on page 43
You edit the `caupgrade` property file to provide Case Analyzer upgrade parameters. You then run the `caupgrade` tool, specifying the `caupgrade.properties` file as input to upgrade the Case Analyzer.

Creating the Case Analyzer upgrade properties file and starting the upgrade with the GUI

Start the caupgrade wizard and set upgrade configuration parameters for an upgrade. After providing input to the wizard screen, you finish the wizard and start the upgrade.

Use the procedures in this task to run the caupgrade wizard to configure upgrade parameters for an upgrade of IBM FileNet Case Analyzer. For upgrades from

Process Analyzer versions 4.5.0, 4.5.1, and Case Analyzer version 5.0, complete these procedures for every Case Analyzer database on your system.

To configure the upgrade parameters for a Case Analyzer upgrade:

1. Open your completed Installation and Upgrade Worksheet file.

   Tip: In the worksheet file, verify that the **Data** > **Filter** > **AutoFilter** command is enabled. To view only **caupgrade** values, filter by **caupgrade** in the **Installation or Configuration Program** column.
2. Log on to the Content Platform Engine server or a remote workstation as *ca_upgrade_user*.
3. At a command prompt, type `C:\Program Files (x86)\IBM\FileNet\ContentEngine\tools\PE\caupgrade.bat -A analyzer.properties` to start caupgrade.

   -E *OLAP database password*
   An independent option that generates an encrypted password to enter into the silent property file.

   -A analyzer.properties
   The `analyzer.properties` file contains raw data that is copied from an existing Case Analyzer prior to the upgrade. This data is not modified by the user.

   -O *output file name*
   The name of the file to which output information is written.

   -I *CA Repository*.**properties**
   The `upgrade.properties` file is optional for the GUI upgrade, but you can specify it if you want to collect this information before you run the upgrade.

   -Y*ca_upgrade_user*+*password*
   The Windows name and password of a user with permission to connect to the Case Analyzer SSAS Connector.

   -s Including this parameter in the command line indicates that caupgrade should run in silent mode. If this parameter is used, an input file must be provided. Input values are read from the input file and no user interface is presented to the user.
4. Using the values from your Installation and Upgrade Worksheet file, complete the wizard screens.
5. Review the summary screen and make any changes if necessary.
6. Click **Finish** to save the information to the output file, `caupgrade.properties`, and to start the upgrade.

Case Analyzer services must be enabled in order for the upgraded Case Analyzer store to process new events. The Case Analyzer service is not enabled by default. To enable Case Analyzer services in Content Platform Engine, do the following steps:

1. Open IBM Administration Console for Content Platform Engine and select the level at which you want to enable Case Analyzer services.
2. Click the **Workflow Subsystem** tab.
3. Select the **Case Analyzer enabled** option and click **OK**.

Creating the Case Analyzer upgrade properties file manually and running the upgrade

You edit the `caupgrade` property file to provide Case Analyzer upgrade parameters. You then run the `caupgrade` tool, specifying the `caupgrade.properties` file as input to upgrade the Case Analyzer.

To create the Case Analyzer upgrade properties file and run the upgrade:

1. Open your completed Installation and Upgrade Worksheet file.

   Tip: In the worksheet file, verify that the **Data** > **Filter** > **AutoFilter** command is enabled. To view only **caupgrade** values, filter by **caupgrade** in the **Installation or Configuration Program** column.
2. Log on to the Content Platform Engine server or a remote workstation.
3. Copy the `caupgrade.properties.sample` file to `caupgrade.properties` and edit the `caupgrade.properties` file using the values from the worksheet.
   a. Change the current directory to *cpe_install_path*`\tools\PE\samples` where *cpe_install_path* is the location of the program files.
   b. Using a text editor, edit the `caupgrade.properties` file by providing the parameter values for your configuration.
   c. Enter the parameters, one parameter per line in the following format:
      parameter name=value
4. At a command prompt, type `C:\Program Files (x86)\IBM\FileNet\ContentEngine\tools\PE\caupgrade -I C:\Program Files (x86)\IBM\FileNet\ContentEngine\tools\PE\samples\caupgrade_`*CA_Repository*`.properties -A` *cpe_install_directory*`\data\`*analyzer.properties* `-Y` *ca_upgrade_user+password*.

   -s (optional) Including this parameter in the command line indicates that caupgrade should run in silent mode. If this parameter is used, an input file must be provided. Input values are read from the input file and no user interface is presented to the user.

Case Analyzer services must be enabled in order for the upgraded Case Analyzer store to process new events. The Case Analyzer service is not enabled by default. To enable Case Analyzer services in Content Platform Engine, do the following steps:

1. Open IBM Administration Console for Content Platform Engine and select the level at which you want to enable Case Analyzer services.
2. Click the **Workflow Subsystem** tab.
3. Select the **Case Analyzer enabled** option and click **OK**.

Installing Case Analyzer software updates

Perform the procedure in this topic for each Case Analyzer instance to install software updates (mod release, fix pack, or interim fix).

To install the IBM FileNet Case Analyzer software updates:

1. To obtain the latest Case Analyzer software updates, and to determine whether additional interim fixes are needed, contact your service representative.
2. Open the readme files for the Case Analyzer software updates and perform the installation procedures in the readme files on each Case Analyzer instance.

"Updating Case Monitor workbench objects"
When you upgrade FileNet Case Analyzer to the IBM FileNet P8 Release 5.2 and you used the Case Monitor workbench objects in the prior release, then you must update your Case Monitor projects files.

Updating Case Monitor workbench objects

When you upgrade FileNet Case Analyzer to the IBM FileNet P8 Release 5.2 and you used the Case Monitor workbench objects in the prior release, then you must update your Case Monitor projects files.

To reuse the workbench objects that monitor active cases, tasks, work items, and workflows with the current release of Case Analyzer, you must update the objects with the replacement views.

In the workbench objects, update the views by changing the following line of code.

Table 3. Case Monitor workbench objects that require updating with current views

Workbench object	Replace...	With...
Case Data Stream	from F_DMCaseWIP	from V_F_DMCaseWIP
Task Data Stream	from F_DMTaskWIP	from V_F_DMTaskWIP
Work Item Data Stream	from F_DMWIP	from V_F_DMWIP
Workflow Data Stream	from F_DMWorkflowWIP	from V_F_DMWorkflowWIP
Number of Work Items Per Bucket Data Stream	from F_DMWIP	from V_F_DMWIP
Number of Workflows Per Bucket Data Stream	from F_DMWorkflowWIP	from V_F_DMWorkflowWIP
Work Item Total Processing Time Threshold Data Stream	from F_DMWIP	from V_F_DMWIP
Workflow Processing Time Threshold Data Stream	from F_DMWorkflowWIP	from V_F_DMWorkflowWIP

For example, in the following workbench object from the IBM FileNet P8 Release 5.0 of Case Monitor, edit the Task Data Stream object file and replace `F_DMTaskWIP` with `V_F_DMTaskWIP`. The corrected object retrieves the appropriate data for your query.

Task Data Stream

```
select DMTaskType_key,
   DMUser_key,
   DMTaskState_key,
   Count(*) as TaskCount,
   avg(WaitCurrentMinutes+MinutesSinceLastEvent*IsInWaitStatus) avgWaitTime ,
   avg(ProcCurrentMinutes+MinutesSinceLastEvent*IsInProcStatus) as avgProcTime ,
   avg(ReadyCurrentMinutes+MinutesSinceLastEvent*IsInReadyStatus) as avgReadyTime ,
   avg(FailCurrentMinutes+MinutesSinceLastEvent*IsInFailStatus) as avgFailedTime
from F_DMTaskWIP
group by DMTaskType_key, DMUser_key, DMTaskState_key
```

Removing Case Analyzer components

You can remove all or selected Case Analyzer components from your Case Analyzer computer.

You cannot remove the IBM FileNet Case Analyzer components separately in silent mode. Running the silent uninstallation program removes all of the Case Analyzer components that are installed on your system.

Perform the following tasks on your Case Analyzer computer for the type of software removal you want to run.

"Removing Case Analyzer components interactively"
Use the Windows Control Panel to remove some or all of the Case Analyzer components interactively.

"Removing Case Analyzer components silently"
You can run a command to silently remove all of the installed Case Analyzer components.

Removing Case Analyzer components interactively

Use the Windows Control Panel to remove some or all of the Case Analyzer components interactively.

To remove IBM FileNet Case Analyzer components interactively:

1. On the computer where Case Analyzer components are installed, select **Control Panel** > **Add/Remove Programs**. On Windows 7, select **Programs and Features**.
2. Select **IBM Case Foundation** and click **Change/Remove** to launch the Uninstall IBM Case Foundation program. On Windows 7, click **Uninstall/Change**.
3. In the Uninstall Options screen, choose to uninstall some or all of the Case Analyzer components.
4. In the Choose Components screen, select which Case Analyzer components to remove.
5. In the Uninstall Complete screen, note the directories and files that cannot be removed by the uninstall program and choose whether to have the program restart the computer or restart it manually.
6. Remove the remaining directories and files, as noted in the Uninstall Complete screen.
7. If you want to completely removed all traces of the IBM Case Foundation installation, delete the `C:\Program Files (x86)\IBM\FileNet\CaseFoundation` directory.

Removing Case Analyzer components silently

You can run a command to silently remove all of the installed Case Analyzer components.

To remove IBM FileNet Case Analyzer components silently:

1. Run the following command:

```
CaseFoundation_install_path\IBM\FileNet\CaseFoundation\_cfuninst\
cf_uninstaller.exe -i silent
```

2. When the uninstallation is complete, check the following log file to verify that the uninstallation was successful.

   C:*USER_TEMP*\CaseFoundation_Uninstalllog

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GC19-3915-00