IBM Case Foundation 5.2.1 Administration

F247
Course Abstract

Course description

This course is for anyone who is responsible for day-to-day operations of a production IBM Case Foundation workflow application. You work with an IBM Case Foundation system to practice and complete workflow system administration tasks. This course is comprised of the following units:

- F231– IBM Case Foundation 5.2.1: Configure the workflow system
- F232 – IBM Case Foundation 5.2.1: Security
- F233 – IBM Case Foundation 5.2.1: Maintain the Workflow System
- F234 – IBM Case Foundation 5.2.1: Manage Work in Progress
- F236 – IBM Case Foundation 5.2.1: Component Integration

Duration

4 days

Delivery Method

Instructor-led (Classroom), Instructor-led Online

Audience

- A Workflow System Administrator is responsible for day-to-day operations of a production IBM Case Foundation workflow application.
- A Workflow System Administrator is typically required to help workflow participants to do the following tasks:
  - Locate work and complete workflows.
  - Respond to management decisions that require changes to work items.
  - Gather information about workflow activity to help management make business decisions.
- During the production phase, the Workflow System Administrator manages operation of the workflow application and communicates with users and managers. In the workflow application deployment phase, the Workflow System Administrator coordinates activities with the Workflow Author to plan and control workflow application implementation into the production environment.

Prerequisites

- Familiarity with Windows 2008 operating systems.
- Familiarity with Java and Java Virtual Machines.
- General knowledge of relational database management systems.

- General knowledge of P8 Platform security concepts.
- General workflow terminology:
  - Workflow
  - Workflow definitions
  - Queues
  - Rosters.
- Start a P8 Platform system.
- Familiarity with P8 Platform administration interfaces, including:
  - Administration Console for Content Platform Engine
  - IBM Content Navigator

Recommended training path:

- F230 IBM Case Foundation 5.2.1: Introduction
- F247 IBM Case Foundation 5.2.1: Administration

Course Objectives

Upon completion of this course, participants will be able to:

- Configure the workflow system
  - Identify the components of a workflow system.
  - Create and configure a workflow system to support FileNet workflow applications.
  - Create and configure an isolated region.
  - Create a connection point and isolated region.
  - Create isolated region objects.
  - Expose data fields.
  - Define indexes for queues and rosters.
  - Create and configure in-baskets and roles.
  - Configure Content Navigator for workflow.
  - Configure a web application and step processor.
- Security
  - Inspect workflow system security settings.
  - Add users and groups to a workflow system.
  - Identify and resolve security issues.
- Maintain the Workflow System
  - Use administrative tools for maintenance
  - Monitor with the Process Services Ping page
  - Monitor with System Dashboard
  - Monitor with vwtool
  - Maintain event logs
- Manage Work in Progress
  - Use Case Foundation tools to search for work with basic and advanced search criteria.
  - Modify work items.

- Process and manage work.
- Manage a workflow exception.

- Component Integration
  - Understand the purpose of component integration in workflow applications.
  - Understand the architecture of the Component Manager Frameworks.
  - Understand what component queues provide.
  - Create and configure a Java component.
  - Monitor and maintain component queues.

Topics

Configure the workflow system

Workflow system concepts

What is a workflow system?

What is the purpose of a workflow system?

Workflow system components

Connection points

Isolated regions

Understand a workflow system and its function.

Identify the components of a workflow system.

Create and configure a workflow system to support FileNet workflow applications.

General properties of a workflow system

Runtime Options

Language Packs

Web Applications

DbExecute Connections

Remote Servers

Isolated Regions

Fine-tuning the workflow system

Create and configure an isolated region.

Create a connection point and isolated region.

Create isolated region objects.

Create and configure Queues.

Create and configure Rosters.

Create and configure Event logs.

Create and configure Application Spaces.

Expose data fields.

Expose data fields to queues and event logs.

Define indexes for queues and rosters.

Create an index.

Configure queues and event logs to use the index.

Create and configure in-baskets and roles.

Create and configure an in-basket.

Create roles.

Add in-baskets and members to roles.

Configure Content Navigator for workflow.

Create a desktop.

Create a repository for the connection point.

Configure the desktop for workflow.

Configure the desktop to open Process Designer and Process Tracker.

Configure a web application and step processor.

Configure a web application.

Deploy a step processor.

Configure a step processor.

Security

Security overview

Layers of security

Object store security

Isolated region security

Workflow system security groups

In-baskets

Application spaces

Roles

Avoid security conflicts

Security configuration

About isolated region security

Control access to queues

Control access to rosters

Control access to rosters: recommended practice

Roster and queue security settings

How to configure queue and roster security

Maintain the Workflow System

Use administrative tools for maintenance

Maintaining a workflow system

Administrative tools for the Workflow system

Administration Console for Content Platform Engine

Lock an isolated region

- Workflow system component administration
- Process Administrator
- Start Process Administrator
- Process Services Ping page
- System Dashboard
- vwtool
- Logging systems

Monitor with the Process Services Ping page

- Process Services Ping Page
- Process Services Ping Page: Overview
- Process Services Ping Page: URL
- Ping Page: Log file location
- Ping page: Helpful links
- Sample: API Stats

Monitor with System Dashboard

- What is System Dashboard?
- Why use System Dashboard?
- Dashboard Terms (1)
- Dashboard Terms (2)
- System Dashboard Structure
- Create clusters to view data
- Use the Dashboard views
- Execute options for Listener node and view data
- Archiving Manager
- Configuration Guidelines
- Process counters to watch (examples)

Monitor with vwtool

- Use vwtool to monitor an isolated region
- Start vwtool
- Obtain status information on workflow system
- Run loadstatus
- Report memory usage, database usage
- Report version and system configuration

Maintain event logs

- Event tools
- Event architecture1
- About event logging
- View event logs
- View events with New Workflow Search

- View events with Process Administrator
- Event log maintenance guidelines
- Select event log options
- PELog

Troubleshoot the workflow system

- Troubleshooting overview
- Support resources
- Collecting data
- For Process Clients issues: fnlog4j.properties
- Fnlog4j concepts
- Enable fnlog4j
- Two trace methods both use log4j
- vwtool trace log options

Manage Work in Progress

Search for work

- Process Administrator
- Search options
- Viewing workflows and work items
- View and customize search results
- Ways to refine a search for work
- Use exposed fields in searches
- Use the Criteria tab to filter a search
- Search user queues
- View workflow history in Process Tracker

Modify work

- Reasons to modify work
- Tools for modifying work
- Work item status
- Locking work
- About workflow properties
- Modify data field values
- Modify workflow groups
- Open workflow or work item in Process Tracker
- Modify an attachment reference
- Considerations for modifying work

Process and manage work

- Tools for processing and managing work
- Ways to complete work items
- Assign or reassign work to participants

Terminate work
Delete work
Designate a substitute participant
Unlock work
Add and remove trackers
Manage workflow exceptions
About workflow exceptions
Conductor queue
Get information about workflow exceptions
View the information stack
Modify workflows and work items
Component Integration
Component integration concepts
Purpose of component integration
Component integrator
Component Manager Frameworks
Deciding on a Component Manager Framework
Component behavior
Types of components
Java adapter
JMS adapter
Create and configure component queues
How to create and configure component queue
Procedure: Create and configure a component queue
Create a code module
New Component Queue wizard
Adapter properties
JAAS credentials
Configure the Java Message Service adapter
What is a queue operation?
Elements of an operation
Operation parameters
Import Java component queue operations
Define JMS component queue operations
Stopping and starting component queues
Diagnosing Component Manager issues
Appendix
Appendix A. Start and Stop System Components
Appendix B. Solutions to exercises

Appendix C. Checkpoint solutions
Appendix D. Checkpoint solutions
Appendix E. Solutions to exercises
Appendix F. Troubleshooting