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IBM Case Foundation 5.2.1

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| Administration | F247  Course Abstract |

For more info: <https://www-03.ibm.com/services/learning/ites.wss/zz-en?pageType=page&c=a0011023>

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