

Perceptive Process Mining

Installation and Setup Guide

Version: 2.6.x

Written by: Product Documentation, R&D
Date: September 2016

perceptivesoftware
from Lexmark

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About Perceptive Process Mining

This guide provides instructions for installing and configuring Perceptive Process Mining, version 2.6, a web-based process mining tool that allows you to extract historical execution data from your applications, and reconstruct and analyze the underlying business process.

About installing Perceptive Process Mining

You can install Perceptive Process Mining on any server that meets the technical specifications for this product. Refer to the *Perceptive Process Mining Technical Specifications* for system requirements.

There are two versions of Perceptive Process Mining: the Standard version and the Enterprise version. The type of license you use during installation determines whether you are running the Standard version or the Enterprise version of Perceptive Process Mining. The Standard version requires you to authenticate users through Perceptive ImageNow. With the Enterprise version, you can authenticate users through an Perceptive ImageNow Server or you can use it as a standalone application that does not integrate with an Perceptive ImageNow server.

You must complete the following steps to install Perceptive Process Mining using Perceptive ImageNow user authentication:

- Prepare for the installation
- Download Perceptive Process Mining
- Install Perceptive Process Mining
- License Perceptive Process Mining
- Set up Perceptive Process Mining for Perceptive ImageNow user authentication
- Configure access rights

You must complete the following steps to install Perceptive Process Mining using local user authentication:

- Prepare for the installation
- Download Perceptive Process Mining
- Install Perceptive Process Mining
- License Perceptive Process Mining
- Set up Perceptive Process Mining for local user authentication
- Configure access rights

You must complete the following steps to upgrade Perceptive Process Mining to a new version:

- Uninstall Perceptive Process Mining
- Download Perceptive Process Mining
- Install Perceptive Process Mining
- License Perceptive Process Mining: some upgrades require a new license

Prepare for the installation

Before beginning this installation, verify the following information:

- Your system must meet the requirements in the *Perceptive Process Mining Technical Specifications* for the version you are installing.
- To install Perceptive Process Mining, you must have system administrator privileges in your Windows environment.
- Perceptive Process Mining runs a web server on port 80. Check to make sure that this port is available. If port 80 is in use and Perceptive Process Mining needs to run on another port, run the installation, and then refer to the Options in config.txt section of this document before proceeding with the license and user setup.
- If you are installing Perceptive Process Mining on a remote server, verify TCP/IP connectivity to the server.
- If you are authenticating users against an Perceptive ImageNow server, verify the connectivity to the server.
Note Password and Username strings are restricted to ASCII characters, regardless of the used Perceptive ImageNow Server or Perceptive Content Server version.

Download Perceptive Process Mining

To download Perceptive Process Mining installation files, complete the following steps.

1. From the Perceptive Software website at www.perceptivesoftware.com, click **Customer Portal**, enter your user name and password, and then click **Product Downloads**.
2. In the **Product Downloads** page, download the appropriate installer file to a temporary directory on your computer.

To locate product documentation, complete the following steps.

1. Go to the Perceptive Software website at www.perceptivesoftware.com, click **Customer Portal**, enter your user name and password, and then click **Product Documentation**.
2. Locate the documentation for Perceptive Process Mining. You can view, print or save a PDF version of the documentation.

Upgrade from a previous version

If you have an earlier version of Perceptive Process Mining installed on your computer, installing a newer version of the product overwrites the existing version. However, your existing data and license files are preserved. Follow the instructions in the Install Perceptive Process Mining section.

Note Some upgrades require that you request a new license. Follow the instructions in the License Perceptive Process Mining section of this document.

Install Perceptive Process Mining

After you downloaded the executable file, you can execute the installation process using the following procedure. To install Perceptive Process Mining, perform the following steps.

1. In Windows Explorer, navigate to where you downloaded the installer file, right-click the executable you downloaded and select **Run as Administrator**.
2. In the **Perceptive Process Mining 2.6 Setup** wizard, perform the following steps.
 1. Click **Next** to continue.
 2. Read the license agreement and scroll down to the end of the text.
 3. Select **I accept the terms in the license agreement**.
If you do not want to select this option, click **Cancel** to terminate the Setup wizard.
 4. Click **Install** to start the installation process.

The installation process might take several minutes to copy the files and install the Perceptive Process Mining Server service.

3. When the installation is complete, verify that **Open Perceptive Process Mining** is checked in the installation window, and then click **Finish**.

If this is the first time you install Perceptive Process Mining, a browser window opens at the Server Configuration Login window to start the licensing process. Otherwise, the browser opens at the normal Log In window where you can log in to use Perceptive Process Mining.

Note Starting the Perceptive Process Mining server may take some time. If the browser window that opens reports that the page is unavailable, please wait 20 to 30 seconds and refresh the page.

Open the Perceptive Process Mining Server Setup

After the initial installation, if you check Open Perceptive Process Mining, a browser opens at the Server Configuration Login page. If you have not checked this option, or if you want to perform the configuration process at another moment, complete the following steps.

1. From the Windows **Start** menu, select **Start > All Programs > Perceptive Process Mining > Configure Perceptive Process Mining**.
2. In the **Server Configuration Login** page, enter the following information as part of the configuration.
 1. In **Username**, **serveradmin** is automatically entered in the field.
 2. In **Password**, type your password (the default password is **EnSiUkOyN**).
3. Click **Log in**.

Note The **serveradmin** user is the user for configuring the Perceptive Process Mining Server. This is a different user than the default **admin** user in Perceptive Process Mining. This **admin** user can perform user management tasks within Perceptive Process Mining.

License Perceptive Process Mining

This procedure divides the steps to license Perceptive Process Mining into two sections: requesting the license and installing the license. If you already have a Perceptive Process Mining license, skip the Request the license section and proceed to Install the license.

Request the license

To request the license, complete the following steps.

1. Open the **Perceptive Process Mining Server Setup** page.
2. In **Installation code**, select the code in the field and copy it. You need this code to request a license.
3. Send the installation code to your Perceptive Software representative.

Install the license

To install the license, complete the following steps:

1. When you receive the license file, store the license file in a directory for future use.
2. Open the license file and copy the license text.
3. Open the **Perceptive Process Mining Server Setup** page.
4. In the **License** box, paste the entire contents of the license file.
Note Do not modify the file.
5. Click **Install license**.
6. After you install the license, in the **Currently installed license** box, verify that the **License status** shows "valid" .
7. If you want to configure Perceptive Process Mining, continue to the steps described in the Set up Perceptive Process Mining sections. If you do not want to configure Perceptive Process Mining, click **Logout & Back to Perceptive Process Mining**.

Set up Perceptive Process Mining with local user authentication

Perceptive Process Mining can authenticate its users either locally (users are stored in the Perceptive Process Mining database) or the authentication can be delegated to an Perceptive ImageNow server.

If you use Perceptive Process Mining with user authentication from Perceptive ImageNow, refer to the Set up Perceptive Process Mining for Perceptive ImageNow user authentication section.

If you use Perceptive Process Mining with local user authentication, you can optionally configure the e-mail settings in the Server Configuration and then change the administrator password, which is a required action.

Configure SMTP Server

Configure the e-mail settings if you want to enable password recovery through e-mail. To configure the SMTP server settings, complete the following steps.

1. Open the **Perceptive Process Mining Server Setup** page.
2. In the **Perceptive Process Mining Server Setup** page, click the **Email (SMTP)** tab.
3. Check **Mail Service enabled** and fill in the **Host address**, **Username** and **Password** fields.
4. Check **Use SSL** if you use a secure connection.
5. Click **Logout & Back to Perceptive Process Mining**.

Change the default administrator account password

Perceptive Process Mining is installed with an administrator account, which has a default username and password. The administrator account password must be changed on first time use.

Note This administrator account (**admin**) is different from the server administration account (**serveradmin**), which is used in the **Server Configuration login**.

To change the password, complete the following steps:

1. In the **Login to Perceptive Process Mining** dialog box, enter the username and password. The username is **admin** and the password is **ProcessMining**. A message displays that the password is expired.
2. Close this message and click **Change or recover password**.
3. In the **Change or recover password** dialog box, enter your username and password. The username is **admin** and the old password is **ProcessMining**. In **New password** and **New password (confirm)**, type a new password for the **admin** account.
4. Click **Change**. You return to the **Login to Perceptive Process Mining** page.

Set up Perceptive Process Mining for Perceptive ImageNow user authentication

To configure Perceptive Process Mining if you connect to an Perceptive ImageNow server and the user authentication is delegated to the Perceptive ImageNow server, complete the following steps. These steps enable you to configure the connection to a Perceptive ImageNow server. To reconfigure the Perceptive ImageNow server version, the Perceptive Process Mining webserver port or the storage location, refer to the Options in config.txt section.

1. Open the **Perceptive Process Mining Server Setup** page.
2. In the **Perceptive Process Mining Server Setup** page, go to the **Perceptive ImageNow Integration** tab.
3. Check the Perceptive ImageNow version in the **Perceptive ImageNow server version** field. If the version does not match the actual version of the Perceptive ImageNow server you are connecting to, you must change the version in the server configuration file. Refer to the Options in config.txt section.
4. Type the **Host** and the **Port** of the Perceptive ImageNow server.
5. Type the **Username** and the **Password** of the Perceptive ImageNow user that will be designated as an administrator in Perceptive Process Mining.

Notes

- The user must have the Perceptive ImageNow privilege 'Workflow Manager.'
- Password and Username strings are restricted to ASCII characters, regardless of the used Perceptive ImageNow Server or Perceptive Content Server version.

Connect to Perceptive Process Mining

Perceptive Process Mining is installed as a Windows Service, the service starts automatically. By default, Perceptive Process Mining uses the LocalService user account and the standard HTTP port (80). Use the Windows Service Manager to start, stop, and restart the Perceptive Process Mining service. To connect to Perceptive Process Mining, complete the following steps.

1. From the Windows **Start** menu, select **Start > All Programs > Perceptive Process Mining > Open Perceptive Process Mining**.
2. In the **Login to Perceptive Process Mining** dialog box, in the **User name** field, type a valid user account name. In the **Password** field, type the password associated with that user account.
Note Check **Remember username** if you want the username field prefilled with your current login name.
3. Click **Log in**.

Configure access rights

How you configure the access rights of users depends on the method of user authentication that is used, local user authentication or authentication through an Perceptive ImageNow server.

Users for local user authentication

Any user with the User Administrator permission can manage users, groups and access rights.

Note The **admin** user is the default administrator, which is created in the installation process. You can create other users that have the User Administrator permission.

Users for Perceptive ImageNow user authentication

The user that is specified in the Perceptive Process Mining Server Setup automatically has User Administrator permission and can therefore manage users, groups and access rights. Any user that successfully logs in is added to the Perceptive ImageNow User group automatically.

Notes

- You must configure the Perceptive ImageNow User group to set the correct access rights for these users.
- Only users that have the Workflow Manager privilege in Perceptive ImageNow are able to log into Perceptive Process Mining.

For more information on user management, refer to the *Perceptive Process Mining Getting Started Guide*.

View active users

The server administrator can check the status of users to determine who is currently logged into the system. You may need to check usage for a variety of reasons including the need to reboot the system or the opportunity to install a product upgrade.

1. Open the **Perceptive Process Mining Server Setup** dialog box
2. Select the **Active visits** tab to view a list of current users.

Uninstall Perceptive Process Mining

To uninstall the product, complete the following step.

- From the Windows **Start** menu, select **Start > All Programs > Perceptive Process Mining > Uninstall Perceptive Process Mining**.

The directory that contains the program, `[drive:]\Program Files\Perceptive Software\Perceptive Process Mining`, is emptied. The directory that contains your data, `[drive:] process-mining-storage`, is not deleted

in the uninstall process. If you delete this directory, you remove all your data (imported datasets, mined models, and graphics) as well as your installed license.

Warning Do not remove the data directory if you uninstall the software with the intent of upgrading Perceptive Process Mining to a newer release.

Note If you have a license key that was created for this deployment, you can use this key to reinstall Perceptive Process Mining.

Configuration options

This section provides several advanced configuration options. To complete the following tasks, you must be an administrator on the machine where Perceptive Process Mining is installed.

Provide network access

If you want to make Perceptive Process Mining available over the network, you must open port 80 in the Windows Firewall. The details of this procedure vary depending on your version of Windows. To open port 80 in a Windows 2008 Server R2 environment, complete following steps. For more information about your specific steps, consult your Windows documentation.

1. Click **Start**, point to **Administrative Tools**, and then click **Windows Firewall with Advanced Security**.
2. Click **Inbound Rules** and, in the **Actions** pane, select **New Rule**.
3. In the **Rule Type** dialog box, select **Port** and click **Next**.
4. Select **TCP**, enter port **80**, and click **Next**.
5. Select **Allow the connection** and click **Next**.
6. Check **Doman, Public, and Private** and click **Next**.
7. Enter **Perceptive Process Mining** in the **Name** field and click **Finish**.
8. Close the window.

Options in config.txt

The server configuration file contains a number of options that can be configured. The server configuration file, config.txt, is located in *[drive:]Program Files\Perceptive Software\Perceptive Process Mining*. You can open the file in a text editor. To authenticate Perceptive ImageNow, complete the following steps.

Perceptive ImageNow authentication

The `Perceptive ImageNow.version` parameter defines the Perceptive ImageNow version of the server against which Perceptive Process Mining authenticates. This applies to users who must authenticate through Perceptive ImageNow Server. This option does not apply to local authentication.

1. Open the configuration file.
2. After the parameter, type the version of Perceptive ImageNow (for instance 6.8) that you are using:

```
imagenow.version = 6.8
```

3. Save the file.

4. Restart the Perceptive Process Mining service.

Change the port

Perceptive Process Mining listens on port 80 by default. If there is a port conflict, you need to resolve this issue before you can successfully start the service. To check the port, complete the following steps.

1. From the command prompt, enter:

```
netstat -ano | findstr /RC:"80.*LISTENING"
```

2. Verify that the listening port is set to 80.

To change the port, complete the following steps.

1. Open the configuration file.
2. To change the default port where Perceptive Process Mining listens, replace the **port** number setting, as shown in the following example:

```
port = 8081
```

3. Save the file.
4. Restart the Perceptive Process Mining Server service.

Change the storage location

Perceptive Process Mining stores all data files in `[drive:]\process-mining-storage` by default. To change the storage option, complete the following steps.

1. Open the configuration file.
2. Assign the **storage** setting with the new path, as shown in the following example:

```
storage = [D:]\process-mining-storage-newstorage
```

3. Save the file.
4. Stop the Perceptive Process Mining Server service.
5. Move or copy the old storage directory (**[drive:]\process-mining-storage**) to the new directory.
6. Restart the Perceptive Process Mining Server service.

Change settings for JVM memory

Perceptive Process Mining runs in a Java Virtual Machine (JVM). At startup, you need to specify the maximum amount of memory that JVM requires. By default, Perceptive Process Mining uses eighty percent of available RAM memory as the maximum amount for the Java Virtual Machine. To change the amount of memory, complete the following steps.

Note Perceptive Process Mining never uses a limit lower than 512 MB. On a 32-bit platform, Perceptive Process Mining uses a maximum of 1250 MB because of JVM limitations. There is no limit on a 64-bit platform.

1. Open the configuration file.
2. Change the **mem** setting, which is the maximum number of megabytes for JVM memory,

```
mem = 1250
```

3. Remove the hash sign (#) in front of the **mem** setting.

4. Save the file.
5. Restart the Perceptive Process Mining Server service.

MySQL database driver

If you use MySQL as a database to import datasets from, a MySQL database driver is required. To install this driver, complete the following steps.

1. Download the **Connector/J 5.1.22** from MySQL: <http://dev.mysql.com/downloads/connector/j/>, download the ZIP file `mysql-connector-java-5.1.22.zip`.
2. Extract the file `mysql-connector-java-5.1.22-bin.jar` from the ZIP file
3. Copy the `mysql-connector-java-5.1.22-bin.jar` file to **C:\Program Files\Perceptive Software\Perceptive Process Mining\web**.
4. Change the file name to `mysql-connector-java.jar` (remove the version number and the -bin part of the filename).
5. Restart the Perceptive Process Mining Server service.

If the jar file is in the right location, Perceptive Process Mining detects it and uses it. If the jar file is not in the expected place, you still have the MySQL import option, but you receive an error message when you try to connect to a MySQL database.

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