

Worksoft Process Intelligence Installation Guide

Worksoft Process Intelligence Installation Guide

Version 14.5

© Copyright 2025 by Worksoft, Inc. All rights reserved.

Worksoft is a business name of Worksoft, Inc. Information in this document is subject to change and revision without notice. The software described herein may only be used and copied as outlined in the Software License Agreement. No part of this manual may be reproduced by any means, electronic or mechanical, for any purpose other than the purchaser's personal use, without prior written permission from Worksoft.

Worksoft provides this documentation "as is" without warranty of any kind, either express or implied. Worksoft may revise information in this document without notice and does not represent a commitment on the part of Worksoft, Inc.

Worksoft, Inc. may have patents or pending patent applications covering subject matter in this document. The furnishing of this document does not give you any license to these patents except as expressly provided in any written license agreement from Worksoft, Inc.

Trademarks

Worksoft Certify® is a registered trademark of Worksoft, Inc.

All other trademarks and trade names mentioned in this guide are the property of their respective owners.

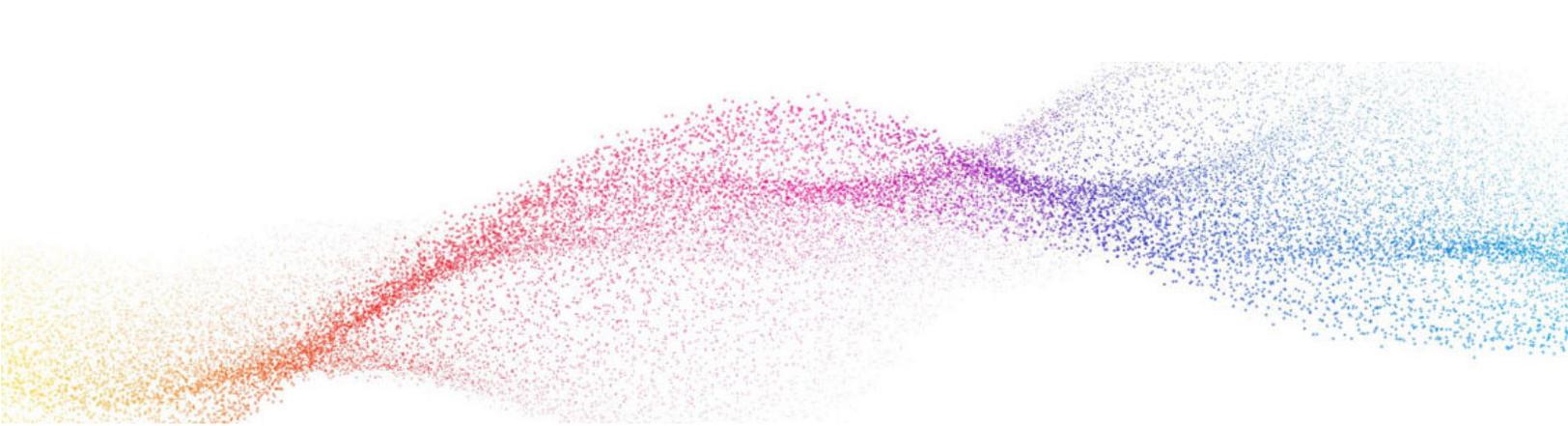
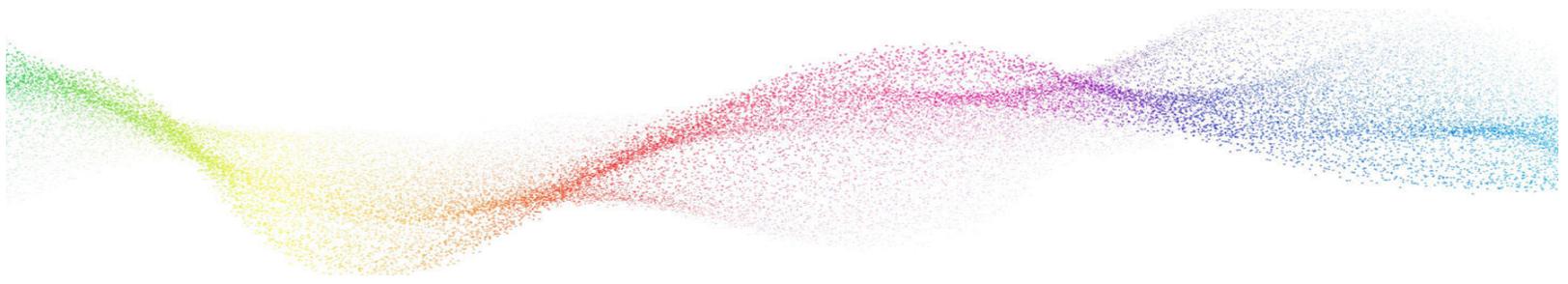


Table of Contents

Chapter 1 Installing Worksoft Process Intelligence	4
Installation Prerequisites	5
Installing Process Intelligence	5
Chapter 2 Creating and Configuring a Process Intelligence Database	10
Creating a Process Intelligence Database	11
Upgrading Your Database	11
Registering Process Intelligence	12
Configuring the Process Intelligence Database in Worksoft Portal	12
Configuring Network and On-Premise Environments	14
Chapter 3 Configuring Process Intelligence	15
Overview	16
Extracting Public and Private Keys	16
OpenSSL Tool	16
Configuring Public and Private Keys in Process Intelligence	17
Configuring the appsettings.json File	17
Verifying the Process Intelligence Task Is Running	18
Chapter 4 Installing and Configuring the Certify Results Exporter	19
Installing the Certify Results Exporter	20
Verifying the Configuration	23
Creating a Worksoft Certify Results Exporter Database	24
Upgrading Your Database	25
Registering the Certify Results Exporter	25
Configuring the Certify Results Exporter Database in Worksoft Portal	25
Configuring the Network and On-Premise Environments	27



Chapter 1 Installing Worksoft Process Intelligence

In This Chapter

Installation Prerequisites	5
Installing Process Intelligence.....	5

Installation Prerequisites

Before installing and configuring Worksoft Process Intelligence, complete the following tasks:

- ◆ Verify that your system meets the requirements listed in the Worksoft Help Portal:
 - [Worksoft Application Server](#)
 - [Database Server](#)
- ◆ Configure your application server.
- ◆ Install and configure the Worksoft Portal and all infrastructure services on the application server.

The Worksoft Portal is an administration tool that registers the following information for Worksoft products:

 - Database settings
 - Licenses
 - Users
 - Groups
 - Email SMTP settings
 - Tenants
 - Integrations

For more information about configuring your application server and installing the Worksoft Portal, see the [Worksoft Infrastructure Services Installation Guide](#) in the [Worksoft Help Portal](#).

Installing Process Intelligence

Verify that your environment has the needed system requirements installed before you begin to install Process Intelligence. For information about system requirements and port requirements, see the [Worksoft Help Portal](#).

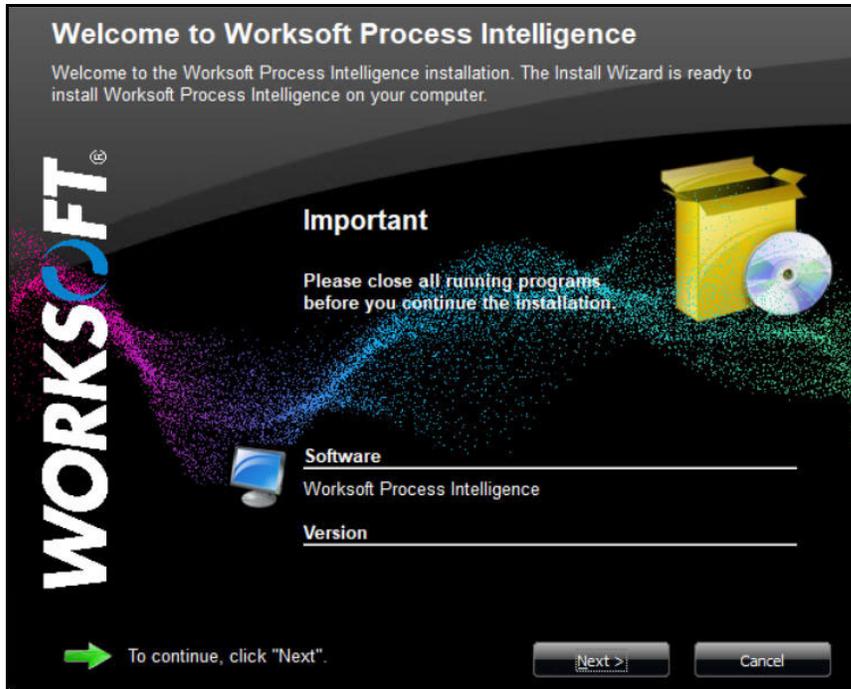
The Process Intelligence package consists of the following components:

Component	Description
Worksoft Process Intelligence (version).exe	Executable that installs Process Intelligence.
WorksoftCertifyResultsExporter (version).exe	Executable that installs Worksoft Certify Results Exporter. The Certify Results Exporter is used to export results from Worksoft Certify to Process Intelligence.
PIDatabaseScripts. (version).zip	The zip file contains the utility and database scripts that create and upgrade your Process Intelligence database.
CREDatabaseScripts. (version).sql	The zip file contains the utility and database scripts that create and upgrade your Certify Results Exporter database.

► **To install Process Installation:**

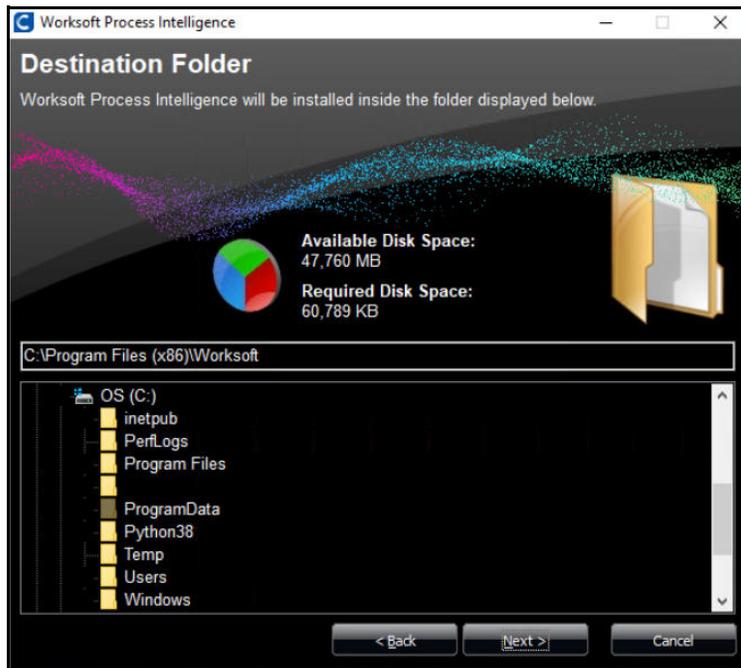
- 1 In your software distribution folder, double-click the **Worksoft Process Intelligence (version).exe** file.

The Worksoft Process Intelligence Install Wizard opens.



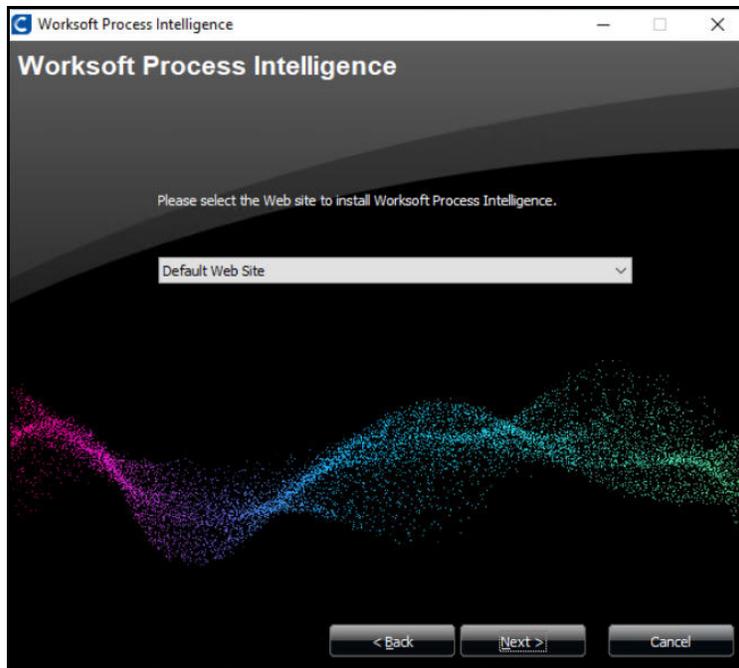
- 2 Click **Next**.

When the system analysis has completed, the Destination Folder page opens.



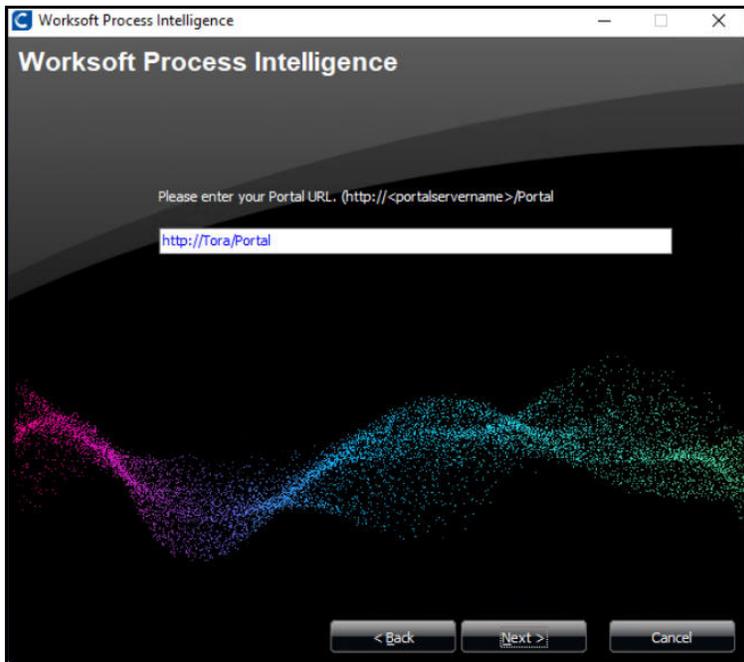
- 3 If you want to accept the default directory for your installation files, click **Next**.
If you do not want to accept the default directory for the installation files, click the **Change** button to select a different installation directory, and then click **Next**.

The Process Intelligence URL page opens.

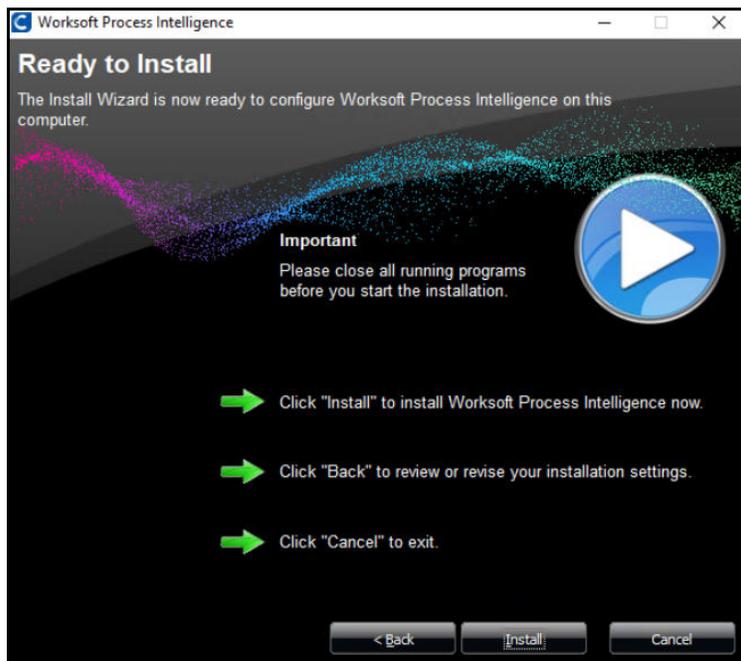


- 4 Enter the external URL address for Process Intelligence.
You must use a fully qualified domain name or a Domain Name System (DNS) alias.
Example: `https://servername.worksoft.com`
- 5 Click **Next**.

The Worksoft Portal URL page opens.

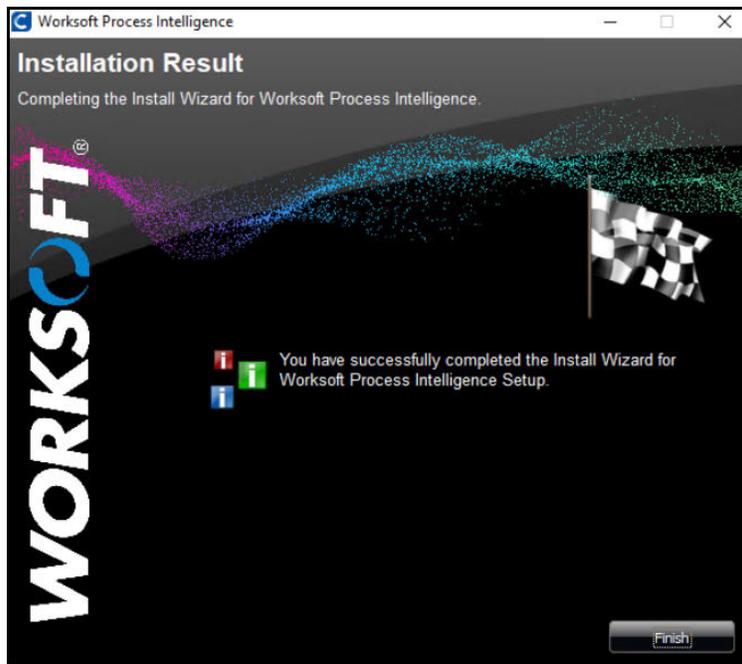


- 6 Enter the external URL address for Worksoft Portal.
You must use a fully qualified domain name or a Domain Name System (DNS) alias.
Example: `https://servername.worksoft.com/portal`
The Ready to Install page opens.



- 7 Click **Next**.

The Worksoft Process Intelligence Installation Completed page opens.



- 8 Click **Finish** to complete the installation.



Chapter 2 Creating and Configuring a Process Intelligence Database

In This Chapter

Creating a Process Intelligence Database	11
Registering Process Intelligence.....	12
Configuring the Process Intelligence Database in Worksoft Portal.....	12
Configuring Network and On-Premise Environments.....	14

Creating a Process Intelligence Database

To use Process Intelligence, you must create a database on your Microsoft® SQL Server. Use the Apply utility tool provided in your Worksoft Process Intelligence distribution package.

If you are creating a database on a remote server, the SQL Server must be installed.

► To populate the Process Intelligence database:

- 1 From your Process Intelligence distribution package, unzip the **PIDatabaseScripts (version).zip** file.
- 2 In the PIDatabaseScripts (version) folder, navigate to the following folder:

```
PIDatabaseScripts > PIDatabase
```

- 3 Double-click **Apply.exe**.

The Create Worksoft Process Intelligence Database tool opens.

- 4 In the Database Server field, enter the server name.
- 5 In the Database Name field, enter the database name.
- 6 If you want to use Windows authentication, select the **Windows Authentication** option.
- 7 If you want to use SQL Server authentication, enter the SQL Server user name and password in the respective fields.
- 8 Click the **Start** button.

The Apply utility begins to create a new database. After the database creation process is completed, a message opens. You are now ready to configure your Process Intelligence database in Worksoft Portal.

Upgrading Your Database

When you upgrade the Process Intelligence database, you must run the Apply tool in the **PIUpdateDatabase** folder. If patches need to be applied, refer to the Readme file for information on how to upgrade your database.

Registering Process Intelligence

You must register Process Intelligence and configure the database in the Worksoft Portal. Process Intelligence leverages information from the Portal—<https://servername.worksoft.com/portal>. Product and services automatically register themselves in the Worksoft Portal when they are installed.

If for some reason Process Intelligence does not automatically register, you can trigger the registration by manually loading Process Intelligence from the Process Intelligence API Swagger page:

`https://<servername>/processintelligence/swagger`

Opening the Swagger page automatically registers Process Intelligence.

If you sign in the first time with the localhost, it will register the localhost, which will cause problems. If this happens, click the **Deregister** button, sign in through the URL address, and register Process Intelligence again.

Configuring the Process Intelligence Database in Worksoft Portal

When you configure your Process Intelligence database, you must select how you want to set up your database security configuration. You need to be a superuser to configure both connections:

- ◆ **User Based Configuration**
- ◆ **Managed Service Identity Configuration**

▶ **To create a Process Intelligence database with a User-Based Configuration connection:**

- 1 From the Worksoft Portal menu, select **Product Configuration > Process Intelligence**.

The Database Configuration page opens.

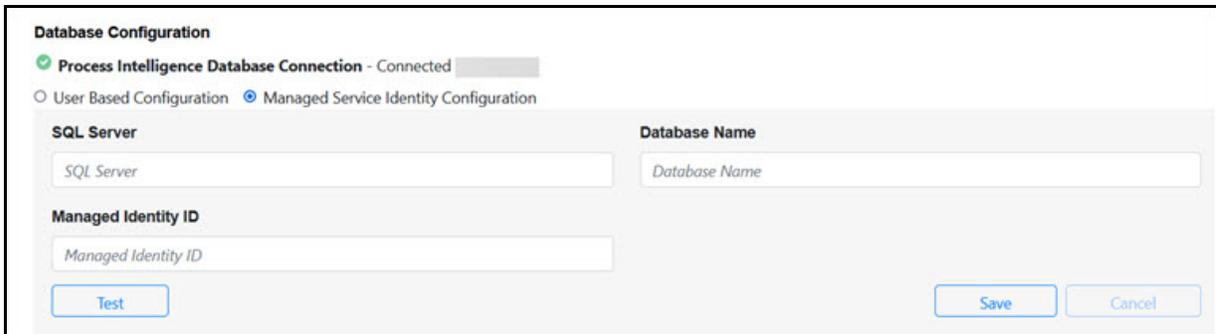
The screenshot shows the 'Database Configuration' interface. At the top, it indicates 'Process Intelligence Database Connection - Connected'. Below this, there are two radio button options: 'User Based Configuration' (which is selected) and 'Managed Service Identity Configuration'. The 'User Based Configuration' section contains several input fields: 'SQL Server' (with a placeholder 'SQL Server'), 'Database Name' (with a placeholder 'Database Name'), 'SQL Username' (with a placeholder 'SQL Username'), and 'SQL Password' (with a placeholder 'SQL Password'). There are also two checkboxes: 'Use Trusted Connection (Windows)' (unchecked) and 'Trust Server Certificate' (checked). At the bottom left, there is a 'Test' button. At the bottom right, there are 'Save' and 'Cancel' buttons.

- 2 Select the **User Based Configuration** option.
- 3 In the SQL Server field, enter the server name.
- 4 In the Database Name field, enter the database name.
- 5 If you want to use Windows authentication, select the **Use Trusted Connection (Windows)** option.
- 6 If you want to use SQL Server authentication, enter the SQL Server user name and password in the respective fields.

- 7 Select the **Trust Server Certificate** option.
- 8 Click **Test** to test your database connection.
A message opens stating if the connection was successful or failed. If the test fails, troubleshoot the database connection.
- 9 Click **OK** to close the message.
- 10 Click **Save** to save your database.
A message opens stating the connection was successful.

► **To create a Process Intelligence database with a Managed Service Identity Configuration connection:**

- 1 From the Worksoft Portal menu, select **Product Configuration > Process Intelligence**.
The Database Configuration page opens.



- 2 Select the **Managed Service Identity Configuration** option.
- 3 In the Database Server field, enter the server name.
- 4 In the Database Name field, enter the database name.
- 5 In the Managed Identity ID field, enter the ID.
- 6 Click **Test** to test your database connection.
A message opens stating if the connection was successful or failed. If the test fails, troubleshoot the database connection.
- 7 Click **OK** to close the message.
- 8 Click **Save** to save your database.
A message opens stating the connection was successful.

Configuring Network and On-Premise Environments

You must also configure the Process Intelligence environment in the Worksoft Portal. You can select to configure your environment to a network or an on-premise environment.

The screenshot shows the 'Process Intelligence configurations' page. At the top, there is a checkbox labeled 'Is On-premise Installation?'. Below this, there are six input fields, each with a green checkmark on the right side, indicating they are filled or valid. The fields are: 'Files Storage Path (for On-premise)', 'Domain (for using network shared folder)', 'Remote Computer Name (for using network shared folder)', 'Username (for using network shared folder)', and 'Password (for using network shared folder)'. The 'Domain' field is highlighted with a blue background.

► To configure a network environment:

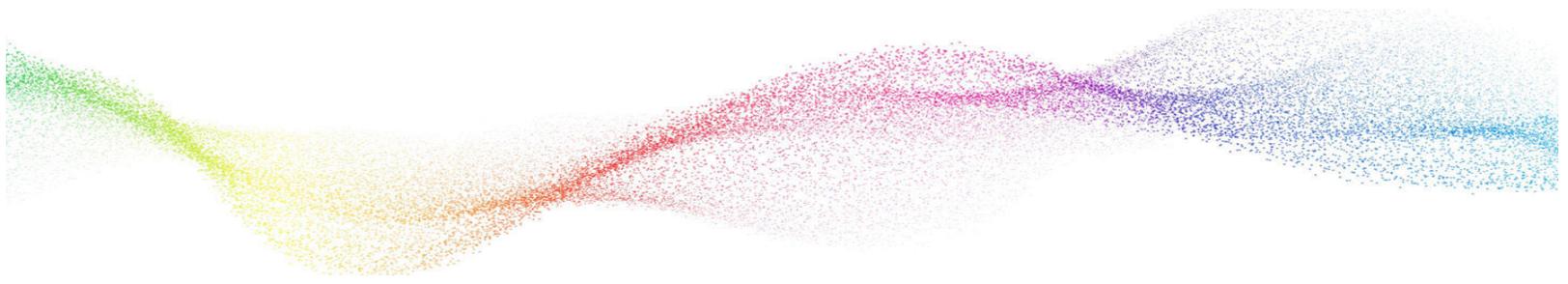
- 1 Scroll down the Process Intelligence page in the Worksoft Portal to the Process Intelligence Configurations section.
- 2 In the Process Intelligence Configurations section, enter the following information:

Parameter	Description
Domain	Enter the domain name for the shared folder.
Remote Computer Name	Enter the name of your remote computer for using the network shared folder.
Username	Enter the username for using the network shared folder.
Password	Enter the password for using the network shared folder.

The configuration is complete.

► To configure an on-premise environment:

- 1 Scroll down the Process Intelligence page in the Worksoft Portal to the Process Intelligence Configurations section.
- 2 In the Process Intelligence Configurations section, select the **Is On-premise Installation?** option.
- 3 In the File Storage Path field, enter the file path where you intend to store your files.
The configuration is complete.



Chapter 3 Configuring Process Intelligence

In This Chapter

Overview	16
Extracting Public and Private Keys	16
Configuring Public and Private Keys in Process Intelligence.....	17
Verifying the Process Intelligence Task Is Running	18

Overview

Before you can use Worksoft Process Intelligence, you must complete the following tasks:

- ◆ Extract public and private keys from a Windows certificate.
- ◆ Configure public and private keys in Process Intelligence.
- ◆ Verify the Process Intelligence task is running.

Extracting Public and Private Keys

After installing Process Intelligence, you must configure a Windows certificate to use with Process Intelligence. Process Intelligence API requires public and private keys for authentication.

These public and private keys need to be extracted from the same certificate that is being used by Process Intelligence.

Public and private keys can have any of following extensions:

- ◆ CER
- ◆ CRT
- ◆ PEM

Process Intelligence default extension is **PEM**. If you use the CER and CRT extension, then you must do additional configuration in Process Intelligence.

Public and private keys do not need to have same extension in Process Intelligence.

OpenSSL Tool

Use the OpenSSL tool to extract the public and private keys from the certificate. The OpenSSL tool is an open-source command line tool that is commonly used to extract public and private keys. To download the tool, go to <https://www.openssl.org/source/>.

OpenSSL for Windows has dependency on Microsoft® Visual C++ 2008 Redistributable Runtime. If it is not installed on the client machine, download it [here](#).

Certificates are password protected. Clients must provide a password along with their certificate to extract public and private keys.

► **To extract a public key with the OpenSSL tool:**

Open the OpenSSL command tool to extract the public key. A public key can be extracted from certificate.pfx or certificate.p12 with any of the following commands:

- ◆ `openssl pkcs12 -in certificate.pfx -out certificate.crt -nokeys`
- ◆ `openssl pkcs12 -in certificate.pfx -out certificate.cer -nokeys`
- ◆ `openssl pkcs12 -in certificate.pfx -out certificate.pem -nokeys`

You will be prompted for the password that was used when creating the certificate.

Process Intelligence uses **certificate.pem** as its default public key.

► **To extract a private key with the OpenSSL tool:**

Open the OpenSSL command tool to extract the private key. A private key can be extracted from `certificate.pfx` or `certificate.p12` with any of the following commands:

- ◆ `openssl pkcs12 -in certificate.pfx -nocerts -out privatekey.crt -nodes`
- ◆ `openssl pkcs12 -in certificate.pfx -nocerts -out privatekey.cer -nodes`
- ◆ `openssl pkcs12 -in certificate.pfx -nocerts -out privatekey.pem -nodes`

You will be prompted for the password that was used when creating the certificate.

Process Intelligence uses **privatekey.pem** as its default public key.

Configuring Public and Private Keys in Process Intelligence

After you have extracted the public and private keys, you will now add them to Process Intelligence.

► **To add public and private keys to Process Intelligence:**

- 1 Go to the following folder on the machine where Process Intelligence is installed:
`C:\Program Files (x86)\Worksoft\ProcessIntelligence\ETLServices`
- 2 Copy and paste public and private keys to the ETLServices folder.

Configuring the `appsettings.json` File

The public and private keys are stored in the **appsettings.json** configuration file that is distributed with Process Intelligence.

If the name of your certificates are different from the default names, **certificate.pem** and **privatekey.pem**, then you need to modify the configuration file by adding the new file names.

► **To edit the `appsettings.json` file:**

- 1 Go to the following folder on the machine where Process Intelligence is installed:
`C:\Program Files (x86)\Worksoft\ProcessIntelligence`
- 2 Open the **appsettings.json** file in a text editor.
- 3 Modify the last two lines in this section with the name of your key files:

```
"OnPremiseSettings": {
  "IsOnPremise": true,
  "BaseFolderPath": "C:\\Worksoft\\ProcessIntelligence\\PIFiles",
  "NetworkShareDomain": "",
  "NetworkShareComputerName": "",
  "NetworkShareUserName": "",
  "NetworkSharePassword": "",
  "CertificateFolderPath": "./",
  "KeyFile": "privatekey.pem",
  "CertificateFile": "certificate.pem"
},
```

- 4 Save the updated file.

Verifying the Process Intelligence Task Is Running

Next, you need to open the Windows Task Scheduler to verify the created Process Intelligence API (PIAPI) task is running or finished running successfully.

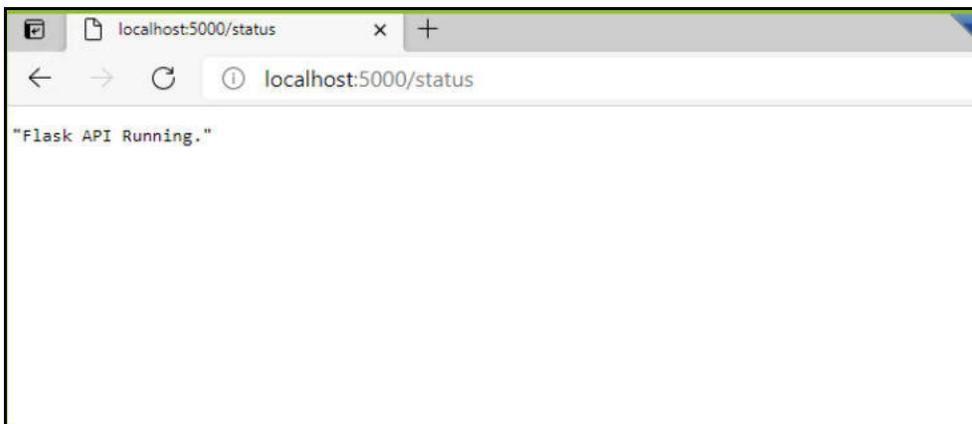
► **To verify the PIAPI task is running:**

- 1 From the Windows Start menu, enter `task scheduler` in the Search window.
- 2 Select Task Scheduler from the search results.
The Task Scheduler opens.

- 3 In the Navigation pane, select **Task Scheduler Library**.



- 4 Right-click the **PIAPI** task and select **Run**.
- 5 Test the API status on a browser by going to **https://<hostname>:5000/status**.
Do not use Windows Internet Explorer to test the status.



You have completed your Process Intelligence configuration. Now you will install and configure the Certify Results Exporter.



Chapter 4 Installing and Configuring the Certify Results Exporter

In This Chapter

- Installing the Certify Results Exporter 20
- Verifying the Configuration 23
- Creating a Worksoft Certify Results Exporter Database 24
- Registering the Certify Results Exporter..... 25
- Configuring the Certify Results Exporter Database in Worksoft Portal 25
- Configuring the Network and On-Premise Environments 27

Installing the Certify Results Exporter

The Certify Results Exporter exports results from Worksoft Certify to Process Intelligence. If the product's system requirements are met, the Exporter can be installed on the same server as the Worksoft Portal or Process Intelligence.

► **To install the Certify Results Exporter:**

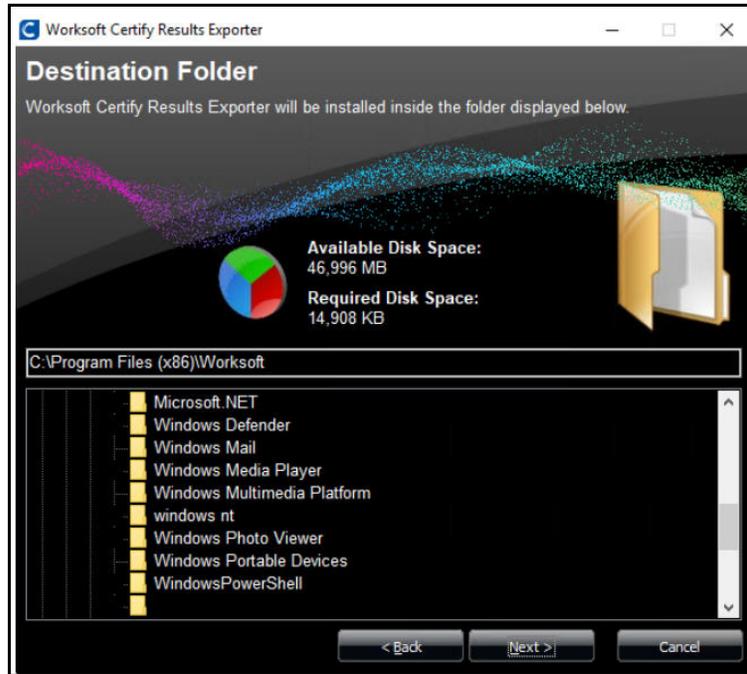
- 1 In your software distribution folder, double-click the **WorksoftCertifyResultsExporter (version).exe** file.

The Worksoft Certify Results Exporter Install Wizard opens.



- 2 Click **Next**.

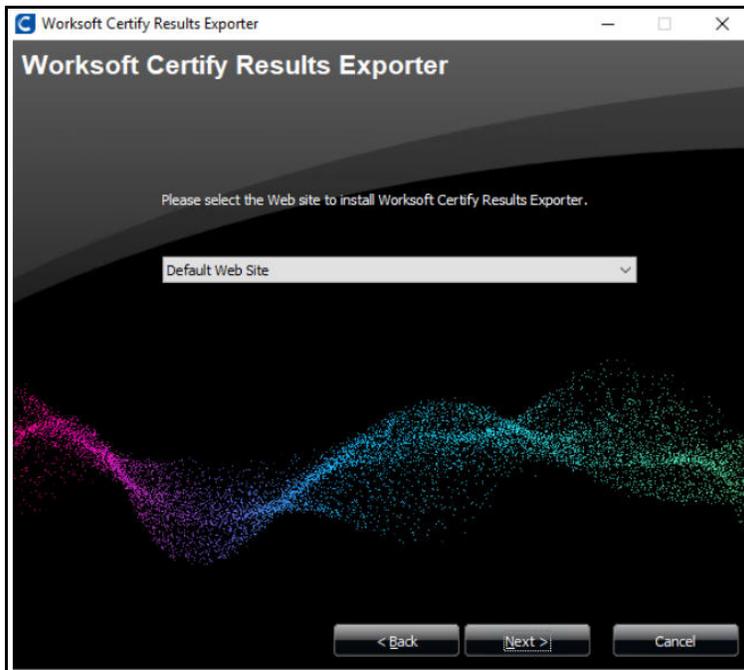
When the system analysis has completed, the Destination Folder page opens.



- 3 If you want to accept the default directory for your installation files, click **Next**.

If you do not want to accept the default directory for the installation files, click the **Change** button to select a different installation directory, and then click **Next**.

The Worksoft Certify Results Exporter URL page opens.



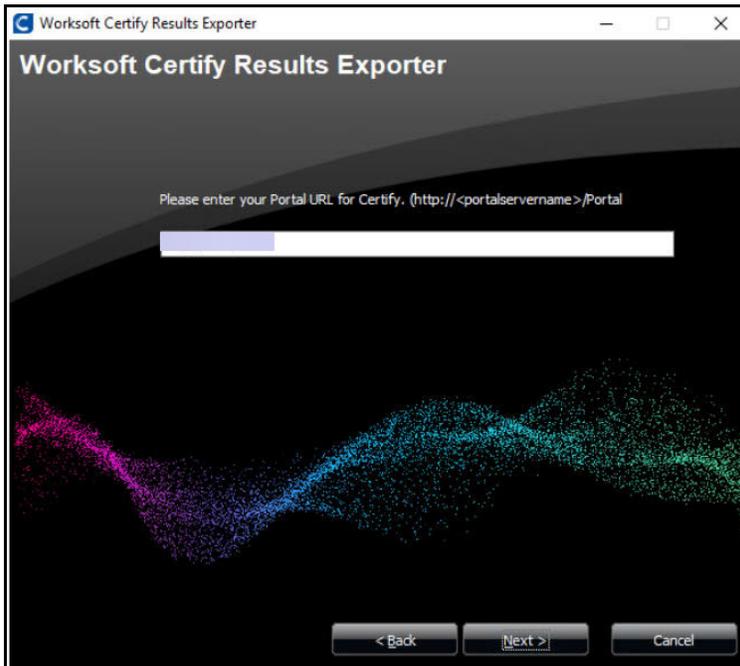
- 4 Enter the external URL address for Worksoft Certify Results Exporter.

You must use a fully qualified domain name or a Domain Name System (DNS) alias.

Example: `https://servername.worksoft.com`

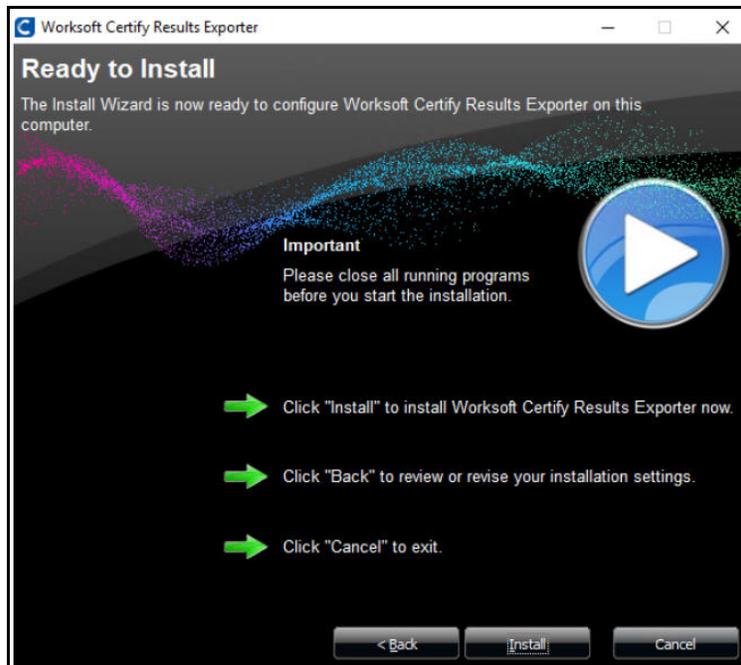
- 5 Click **Next**.

The Worksoft Portal URL page opens.



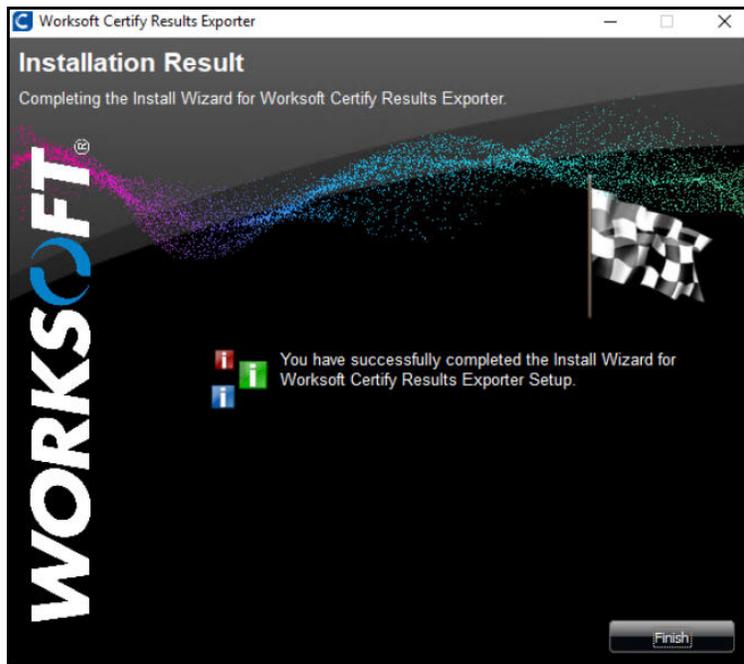
- 6 Enter the external URL address for Worksoft Portal.

The Ready to Install page opens.



- 7 Click **Next**.

The Worksoft Certify Results Exporter Installation Completed page opens.



- 8 Click **Finish** to complete the installation.

Verifying the Configuration

After you install the Worksoft Certify Results Exporter, you need to verify the URL addresses in the **appsettings.json** file.

In the `C:\Program Files (x86)\Worksoft\Certify Results Exporter` folder, verify the following values:

- ◆ Base URL – Default value is `https://<servername>/CertifyResultsExporter`.
- ◆ ServerSettings:CertifyPortalUrl – This value should be populated with the Worksoft Portal URL entered during installation.

Creating a Worksoft Certify Results Exporter Database

Next, you must create an empty SQL Server database for the Certify Results Exporter. This database can reside on the same server as your Worksoft Certify databases.

Use the Apply utility tool provided in your Worksoft Process Intelligence distribution package.

► **To populate the Certify Results Exporter database:**

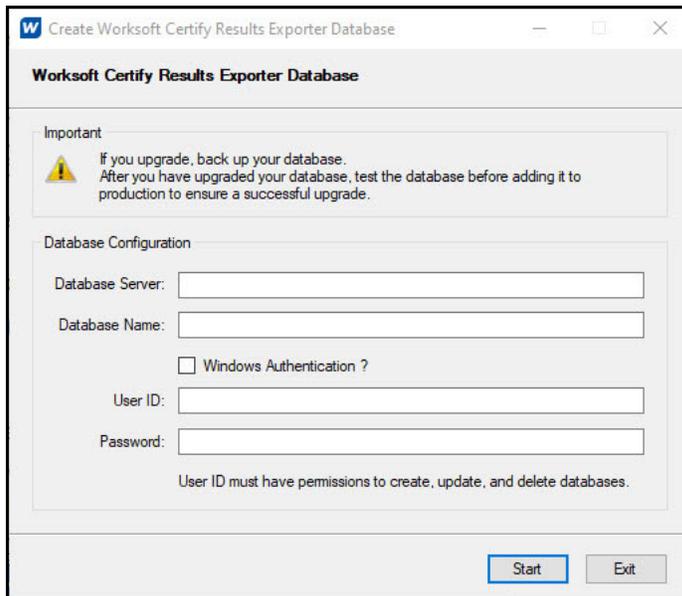
1 From your Process Intelligence distribution package, unzip the **CREDatabaseScripts (version).zip** file.

2 In the CREDatabaseScripts (version) folder, navigate to the following directory:

CREDatabaseScripts > CREDatabase

3 Double-click **Apply.exe**.

The Create Worksoft Certify Results Exporter Database tool opens.



4 In the Database Server field, enter the server name.

5 In the Database Name field, enter the database name.

6 If you want to use Windows authentication, select the **Windows Authentication** option.

7 If you want to use SQL Server authentication, enter the SQL Server user name and password in the respective fields.

8 Click the **Start** button.

The Apply utility begins to create a new database. After the database creation process is completed, a message opens.

You are now ready to configure your Certify Results Exporter database in Worksoft Portal.

Upgrading Your Database

When you upgrade the Certify Results Exporter database, you must run the Apply tool in the **CREUpdateDatabase** folder. If patches need to be applied, refer to the Readme file for information on how to upgrade your database.

Registering the Certify Results Exporter

You must register the Certify Results Exporter and configure the database in the Worksoft Portal. Certify Results Exporter leverages information from the Portal—<https://servername.worksoft.com/portal>. Product and services automatically register themselves in the Worksoft Portal when they are installed.

If for some reason the Certify Results Exporter does not automatically register, you can trigger the registration by manually loading the Certify Results Exporter from the Certify Results Exporter API Swagger page:

<https://<servername>/CertifyResultsExporter/swagger>

Opening the Swagger page automatically registers the Certify Results Exporter.

Configuring the Certify Results Exporter Database in Worksoft Portal

When you configure your Certify Results Exporter database, you must select how you want to set up your database security configuration. You need to be a superuser to configure both connections:

- ◆ **User Based Configuration**

- ◆ **Managed Service Identity Configuration**

- ▶ **To create a Certify Results Exporter database with a User-Based Configuration connection:**

- 1 From the Worksoft Portal menu, select **Product Configuration > Certify Results Exporter**.

The Database Configuration page opens.

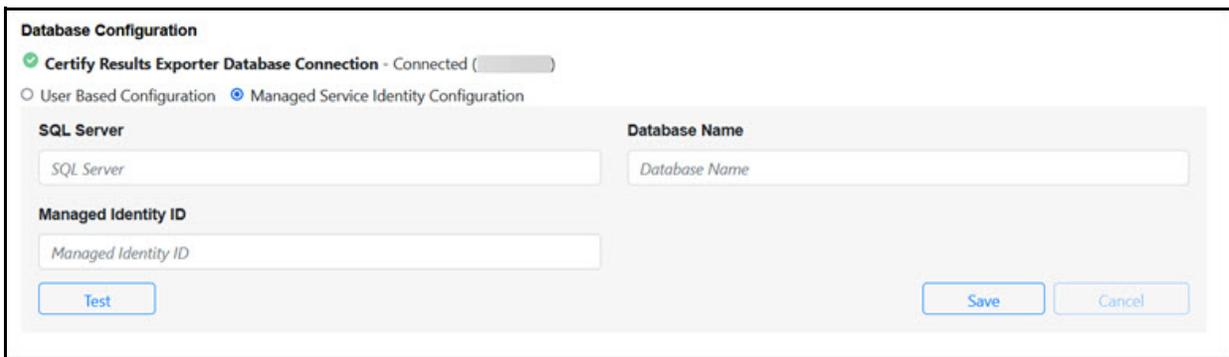
The screenshot shows the 'Database Configuration' interface. At the top, it indicates 'Certify Results Exporter Database Connection - Connected'. Below this, there are two radio buttons: 'User Based Configuration' (which is selected) and 'Managed Service Identity Configuration'. The form contains several input fields: 'SQL Server' (with a placeholder 'SQL Server'), 'Database Name' (with a placeholder 'Database Name'), 'SQL Username' (with a placeholder 'SQL Username'), and 'SQL Password' (with a placeholder 'SQL Password'). There are also two checkboxes: 'Use Trusted Connection (Windows)' (unchecked) and 'Trust Server Certificate' (checked). At the bottom left is a 'Test' button, and at the bottom right are 'Save' and 'Cancel' buttons.

- 2 Select the **User Based Configuration** option.
- 3 In the SQL Server field, enter the server name.
- 4 In the Database Name field, enter the database name.
- 5 If you want to use Windows authentication, select the **Use Trusted Connection (Windows)** option.

- 6 If you want to use SQL Server authentication, enter the SQL Server user name and password in the respective fields.
- 7 Select the **Trust Server Certificate** option.
- 8 Click **Test** to test your database connection.
A message opens stating if the connection was successful or failed. If the test fails, troubleshoot the database connection.
- 9 Click **OK** to close the message.
- 10 Click **Save** to save your database.
A message opens stating the connection was successful.

► **To create a Certify Results Exporter database with a Managed Service Identity configuration connection:**

- 1 From the Worksoft Portal menu, select **Product Configuration > Certify Results Exporter**.
The Database Configuration page opens.



The screenshot shows the 'Database Configuration' interface. At the top, it indicates a successful connection: 'Certify Results Exporter Database Connection - Connected'. Below this, the configuration mode is set to 'Managed Service Identity Configuration'. The 'SQL Server' field contains 'SQL Server', the 'Database Name' field contains 'Database Name', and the 'Managed Identity ID' field contains 'Managed Identity ID'. There are 'Test', 'Save', and 'Cancel' buttons at the bottom of the configuration area.

- 2 Select the **Managed Service Identity Configuration** option.
- 3 In the Database Server field, enter the server name.
- 4 In the Database Name field, enter the database name.
- 5 In the Managed Identity ID field, enter the ID.
- 6 Click **Test** to test your database connection.
A message opens stating if the connection was successful or failed. If the test fails, troubleshoot the database connection.
- 7 Click **OK** to close the message.
- 8 Click **Save** to save your database.
A message opens stating the connection was successful.

Configuring the Network and On-Premise Environments

You must configure a Certify Results Exporter storage folder to save Capture files. You have the option to export the Capture files to Process Intelligence or save them in a Certify Results Exporter folder.



Certify Results Exporter configurations

Is On-premise Installation? Is On-premise Installation?

Optionally Store Capture Files in CRE? Optionally Store Capture Files in CRE?

Capture Files Storage Path (for On-premise) ✓

► **To configure a storage folder for Capture files:**

- 1 Scroll down the Certify Results Exporter page in the Worksoft Portal to the Certify Results Exporter Configurations section.
- 2 If you are installing on-premise, select the **Is On-premise Installation** option.
- 3 If you want to store Capture files in the Certify Results Exporter, select the **Optionally Store Capture Files in CRE** option.
- 4 If installing on-premise, enter a folder path in the Capture Files Storage Path field where Capture files are saved.

The Certify Results Exporter configuration is complete.