

# **Worksoft Analyze Installation Guide**

# Worksoft Analyze Installation Guide

## Version 12

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# Chapter 1      Preparing For Installation

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## Understanding Worksoft Analyze Installation

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In order to use Worksoft Analyze,™ you need to install the following applications:

- ◆ Worksoft Portal - An administration tool that registers MongoDB database settings, licenses, users, and email SMTP settings. Worksoft Analyze leverages this information.

If you already have Worksoft Portal already installed, you can use that version.

- ◆ Worksoft Analyze - Uses a shared repository approach for organizing and promoting collaboration in business process discovery and analysis among users in the enterprise.

### System Requirements

Before you begin to install Worksoft Analyze, verify that your environment has the needed system requirements installed. For information about system requirements and planning your environment, see the [Worksoft Help Portal](#).

**Warning:**



A new server must be provisioned for Worksoft Analyze only. Do not install Worksoft Analyze on the same server as other Worksoft products and other applications because of the constraint of bandwidth on the network interface controller (NIC card).

### Port Requirements

In order to import generated Worksoft Analyze Captures into Certify, you need to use HTTPS on your application server and leave the HTTP binding on default port 80. After you have reconfigured the application server to use HTTPS, the port will now default to 443. You will need both ports open.

For more information, see [Chapter 2 "Using HTTPS on Your Application Server"](#).

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## Configuring Your Application Server

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In order to transform your application server into a web server, Microsoft® Internet Information Services (IIS) must be installed in order to host Worksoft Web services and Worksoft web applications. After you have installed IIS, you will need to configure the Server Manager.

This chapter will guide you to configuring the minimum requirements for Worksoft Analyze. You may need assistance from your IT administrator.

### Adding Roles and Features

The Server Manager allows you to add specific roles and features to your web server that are required for Worksoft products.

► **To add roles and features to your web server:**

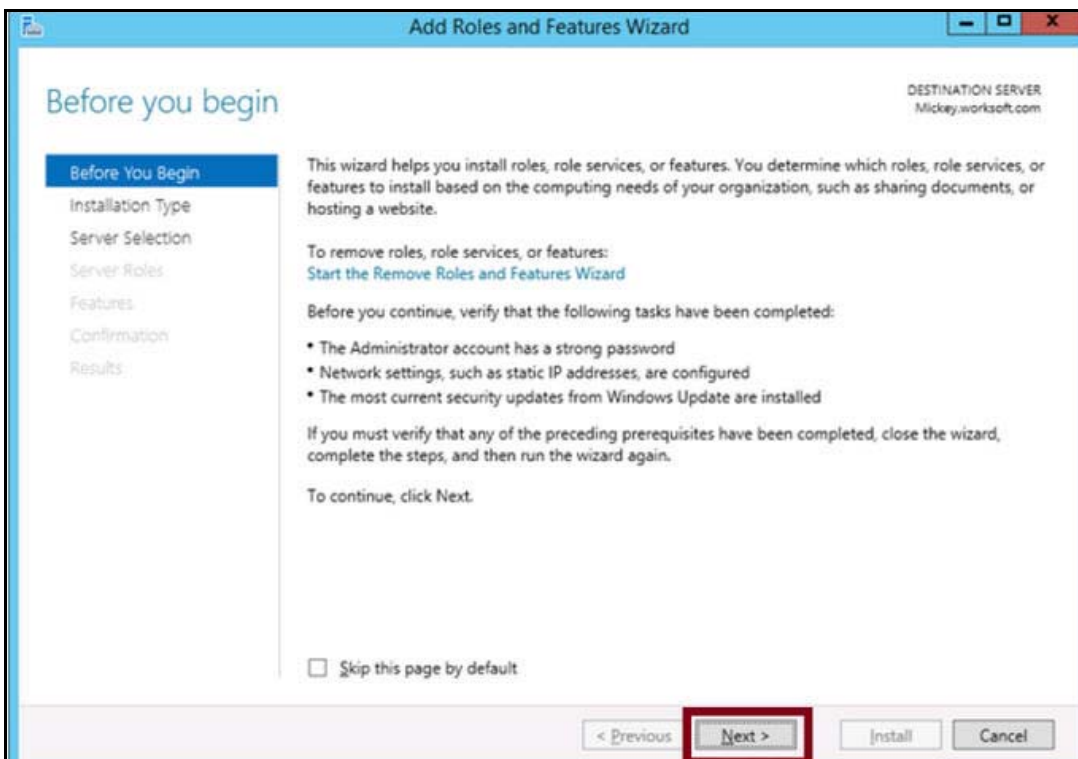
- 1 From the Start menu, select **Administrative Tools > Server Manager**.

The Server Manager opens.

- 2 In the Navigation pane, select **Dashboard**.

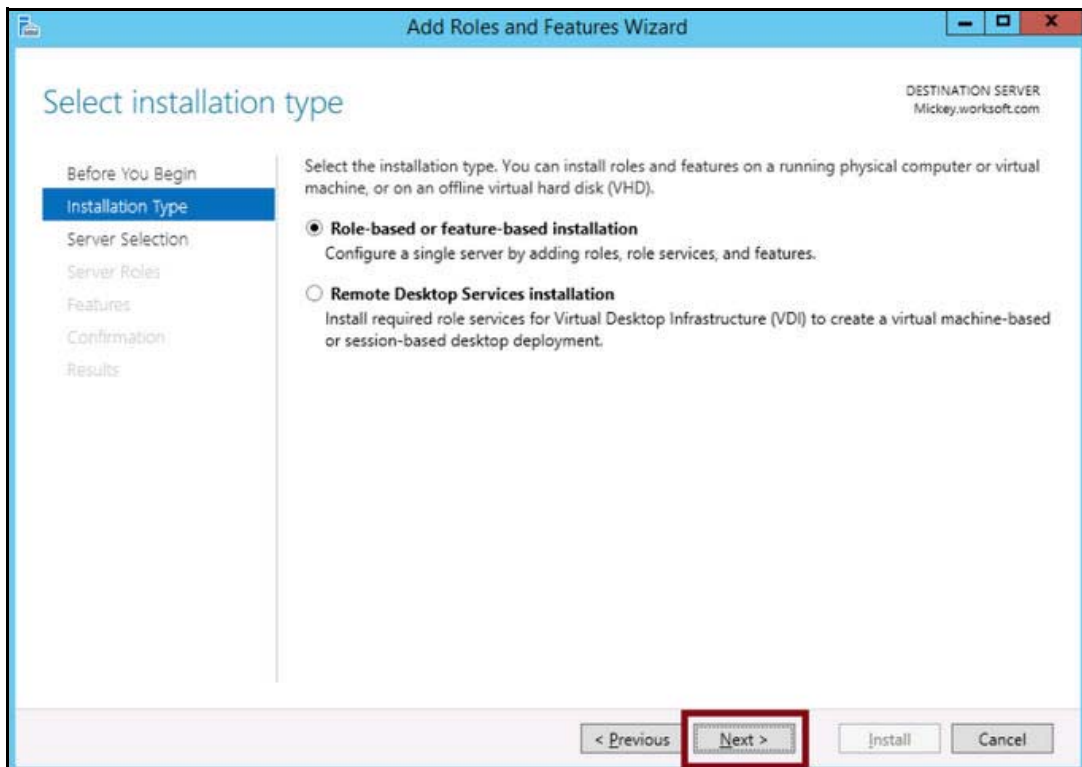
- 3 In the Summary Tasks pane, select **Add Roles and Features**.

The Add Roles Wizard opens.



- 4 Click **Next**.

The Select Installation Type page appears.

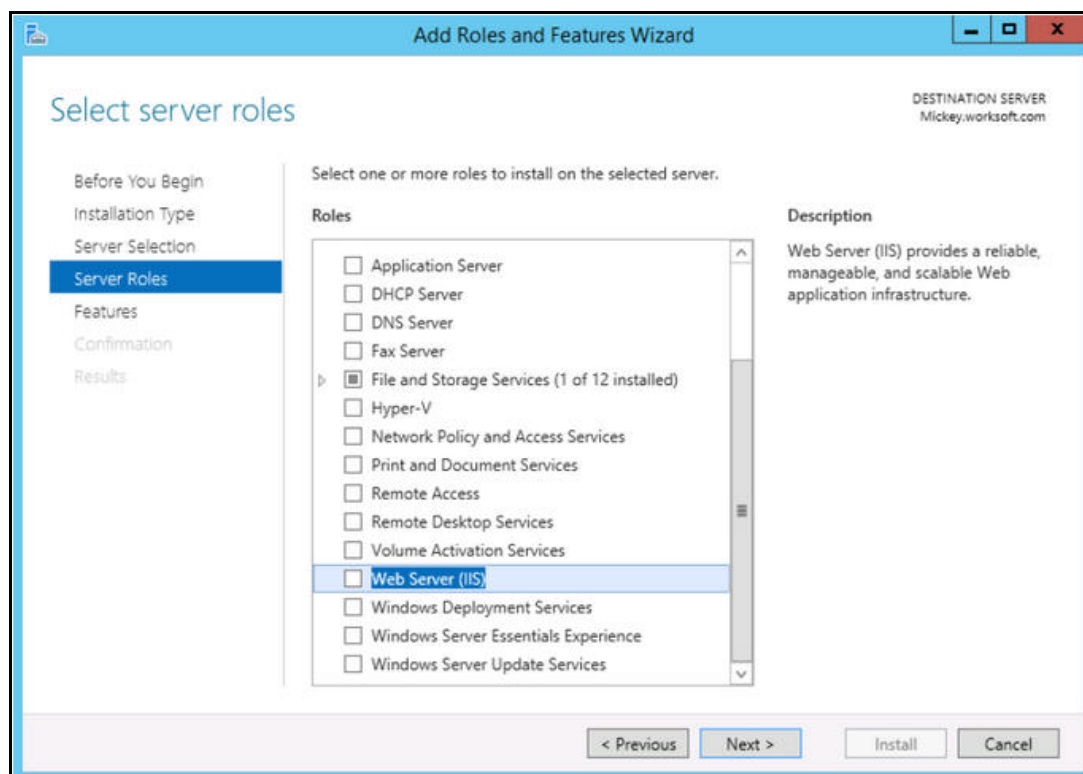


5 Select the **Role-based or feature-based installation** option.

6 Click **Next**.



The Select Server Roles page appears.



7 From the Server Roles list, select the following roles:

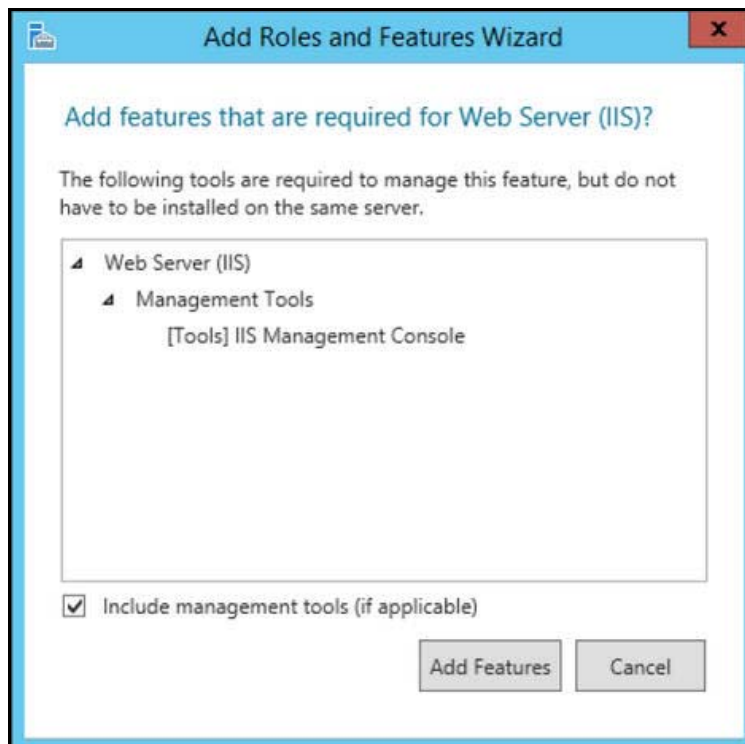
- **File Services**
- **Web Server (IIS)**

8 Click **Next**.

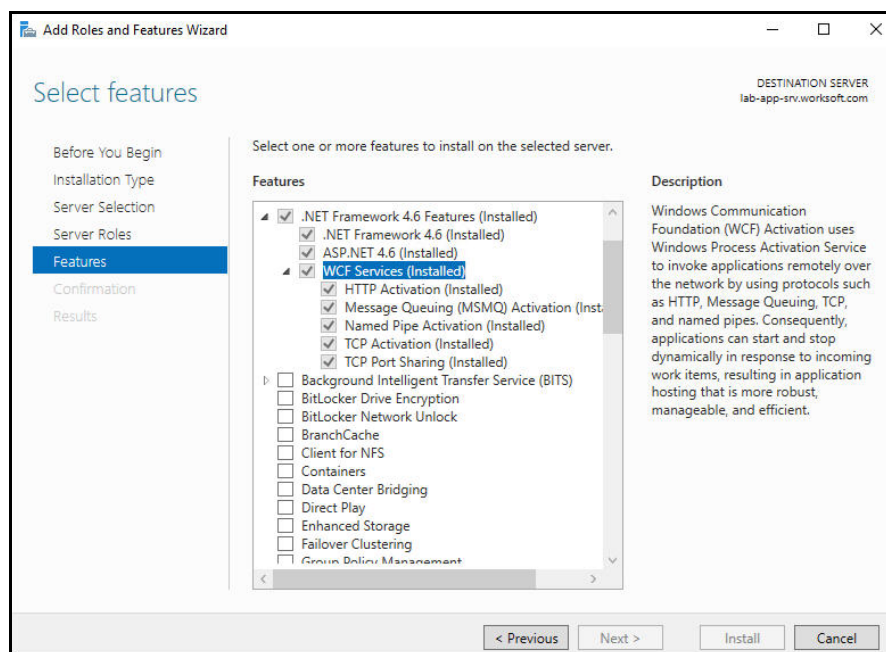
After you have added the roles to the web server, you will add features to the web server.



A dialog box appears asking if you want to add features to the web server.

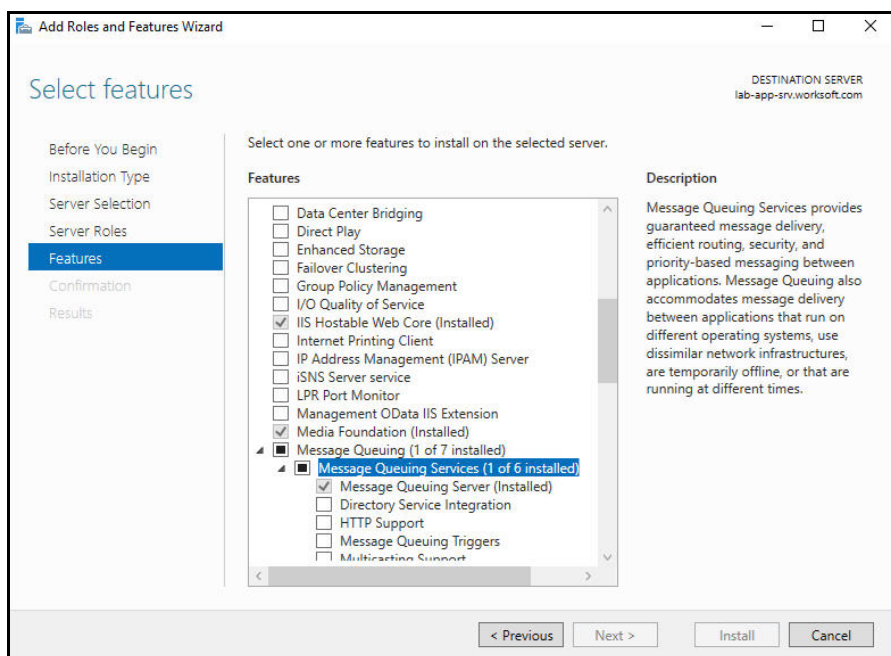


- 9 In the Add Features dialog box, select the **Include Management Tools (if applicable)** option.
- 10 Click **Add Features**.  
The Select Features page appears.
- 11 Select the **.NET Framework 4.6 Features (Installed)** and all of its child nodes.



- 12 Select the **WCF Services (Installed)** and all of its child nodes.

**13 Select IIS Hostable Web Core (Installed) and Media Foundation (Installed).**



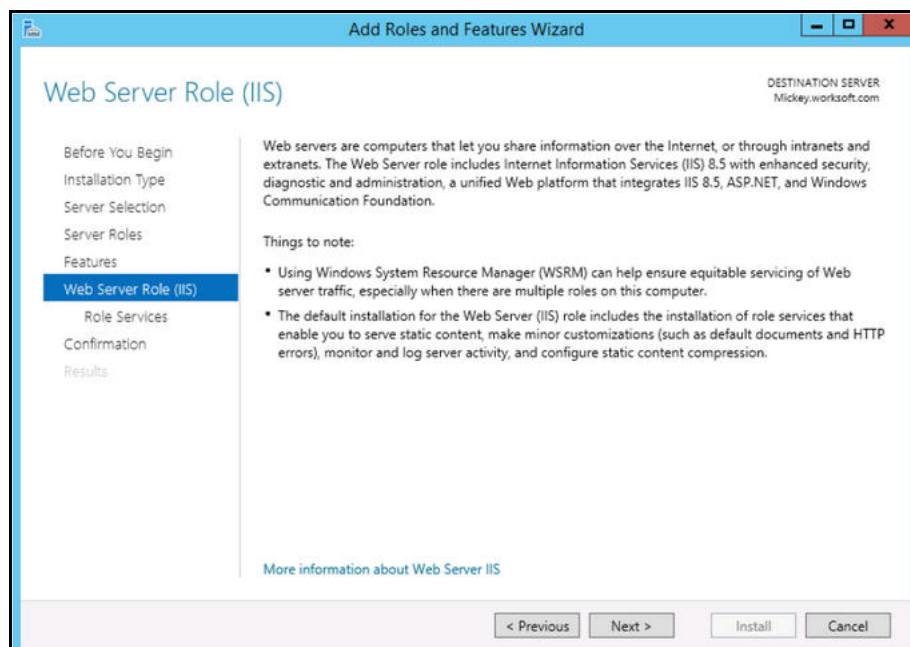
**14 Verify that **Message Queuing (1 of 7 installed)** and **Message Queuing Server (Installed)** is enabled.**

**15 Use the scroll bar to verify the **Windows Process Activation Service** is enabled with the following child nodes:**

- Process Model (Installed)
- Configuration APIs (Installed)

**16 Click **Next**.**

The Web Server Role (IIS) page appears.

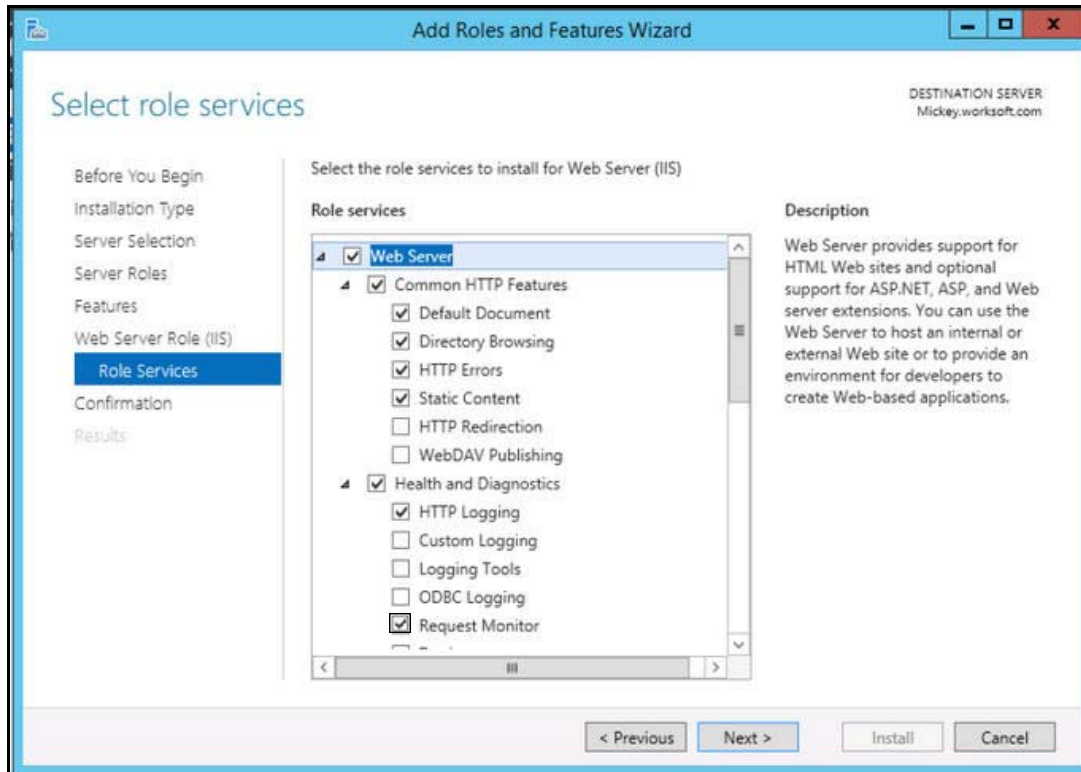


## Configuring the Web Server Role (IIS)

After you have added your roles and features, you will now need to configure the Web Server role (IIS) in the Server Manager.

- 1 Click **Next** on the Web Server Role (IIS) screen.

The Select Role Services page appears.



- 2 In the Role Services list, select the following services. You will need to use the scroll bar to select all of the services.

Node	Child Nodes
Common HTTP Features	Default Document Directory Browsing HTTP Errors Static Content WebDAV - Verify that this option is disabled. Worksoft's RESTful Services will not work correctly if enabled.
Health and Diagnostics	HTTP Logging Request Monitor
Performance	Static Content Compression Dynamic Content Compression
Security	Request Filtering Basic Authentication
Application Development	.NET Extensibility 4.6 Application Initialization ASP ASP.NET 4.6 CGI ISAPI Extensions ISAPI Filters WebSocket Protocol
Management Tools	IIS Management Console IIS Management Scripts and Tools Management Service

- 3 Click **Next**.  
The Confirm Installation Selections page appears.
- 4 Click **Install** to install the role services.

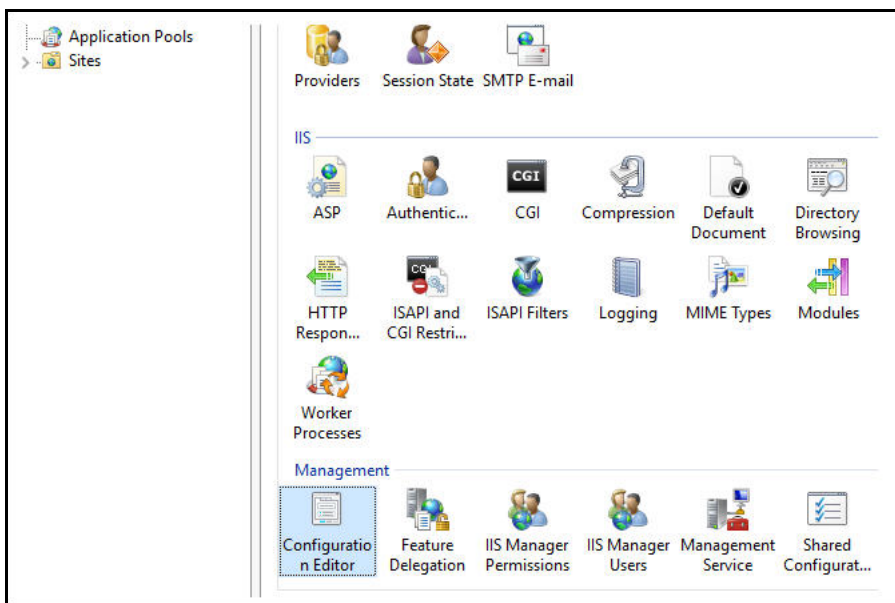
## Configuring Application/Json Mime-Type Compression

After you have enabled dynamic content compression within IIS, you need to verify HTTP Compression for the application/json mime-type. Worksoft Analyze uses dynamic content compression to improve performance.

In order to implement this performance improvement in Analyze, HTTP compression must be enabled for the application/json mime-type. When the Dynamic Content Compression feature is enabled, it will overwrite any previous HTTP compression settings. If the application/json mime-type was already included in the list of allowed dynamic mime-types before the Dynamic Content Compression feature is enabled, it will be removed.

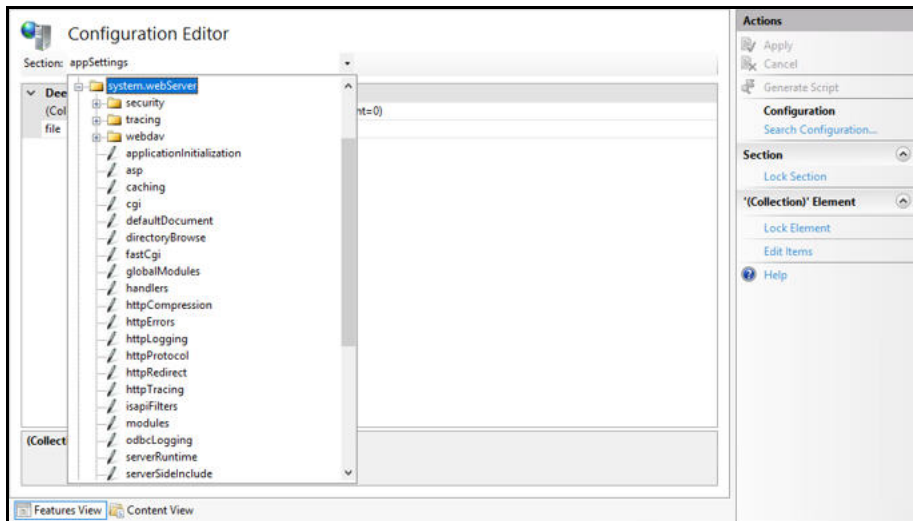
### ► To verify application/json mime-type compression:

- 1 Open **IIS Manager**.
- 2 In the left Navigation pane, click on your server.
- 3 In the Management section, double-click the **Configuration Editor**.

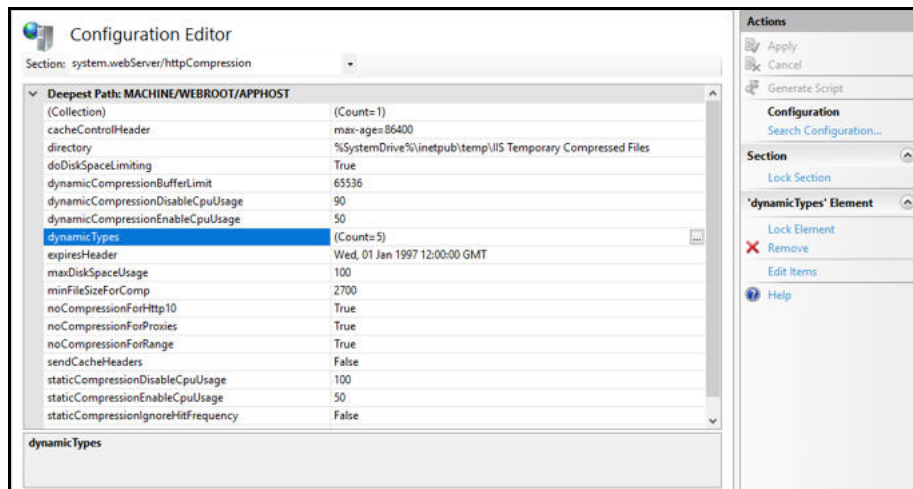


The Configuration Editor opens.

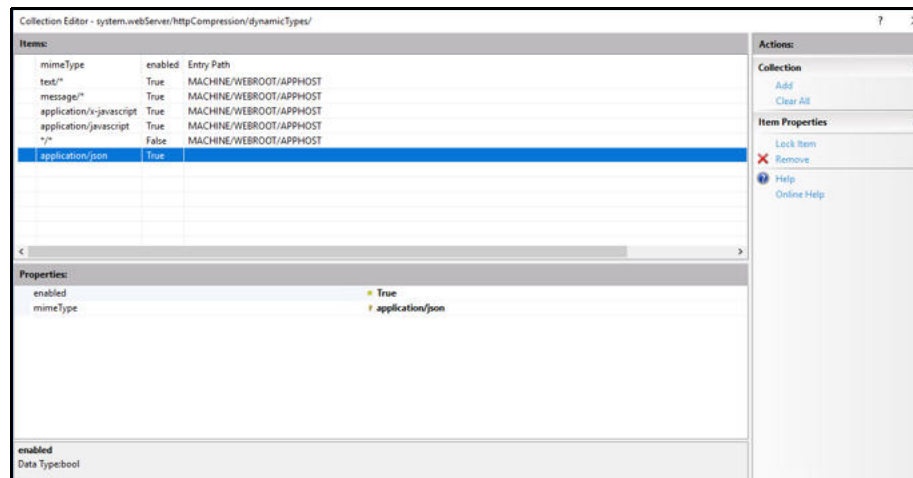
- 4 From the Section drop-down list, select **system.webServer > httpCompression**.



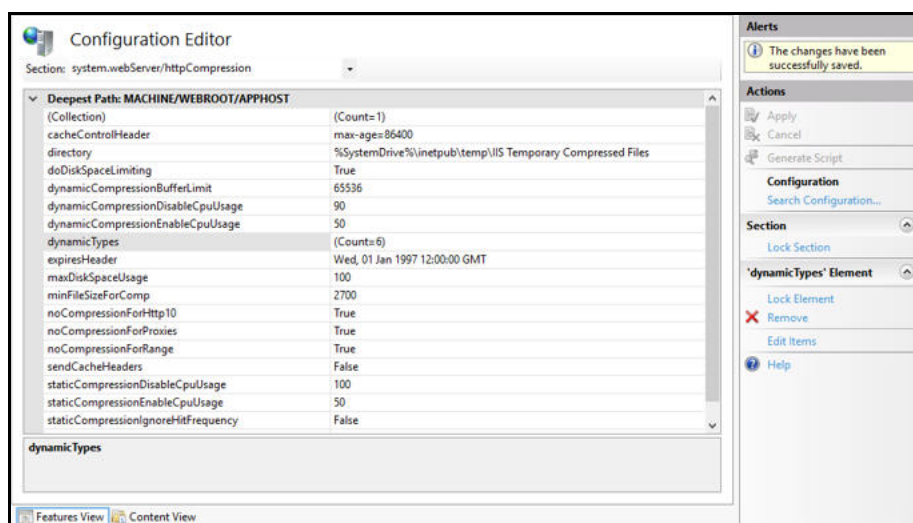
- 5 In the httpCompression section, click the **dynamicTypes**.



- 6 Verify that **application/json** is listed in the dynamic compression mime types. If it is not listed, click the **Add** button in the Collection section to add it.



- 7 After you completed your verification or addition, click the **Close** button. The Configuration Editor opens.



- 8 Click **Apply** to apply your changes.
- 9 Verify that dynamicTypes lists a count of six.
- 10 Close the editor.

## Enabling IIS Services

You will now need to verify that several IIS services are enabled.

### ► To verify IIS services are enabled:

- 1 If the Server Manager is not open, select **Administrative Tools > Server Manager** from the Start menu.  
The Server Manager opens.
- 2 In the Navigation pane, select **IIS**.
- 3 In the right Services pane, verify that the following services are enabled and running:
  - **Application Host Helper Service**
  - **IIS Admin Service**
  - **Windows Process Activation Service**
  - **World Wide Web Publishing Service**
- 4 If any of these window services are not running, you will need to start these services.  
To start a service, select the service from the list and click **Start** in the right menu. You are also able to start your services by going to **Administrative Tools > Services** on your machine.





# Chapter 2    Installing and Configuring Worksoft Analyze

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## Worksoft Portal

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Before you begin to install Worksoft Analyze, you need to install the Worksoft Authorization service and Worksoft Portal. Go to the [Worksoft Customer Portal](#) to download them.

For Worksoft Portal's system requirements and installation guide, see the [Worksoft Help Portal](#).

When installing Worksoft Portal, use the external URL for the Authentication service, and do not use a localhost. Portal has a discovery service that tells applications like Worksoft Analyze where to look for the Auth service. If you use a localhost, it will cause the applications to break.

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## Installing Worksoft Analyze

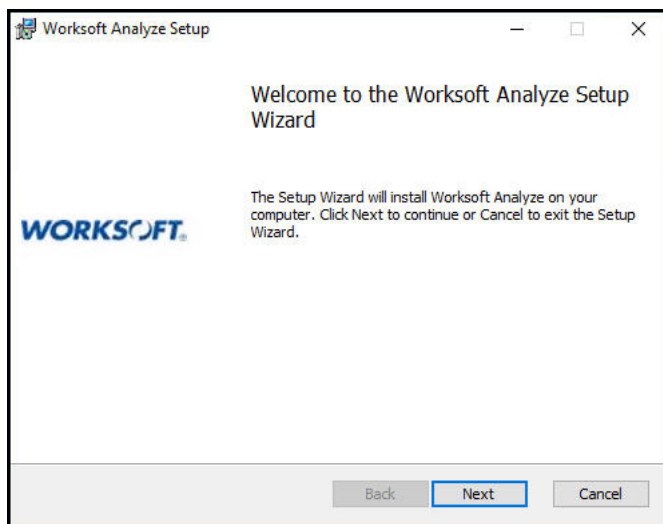
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After you have installed the Worksoft Authorization service and Worksoft Portal, you will now install Worksoft Analyze on your server.

► **To install Worksoft Analyze:**

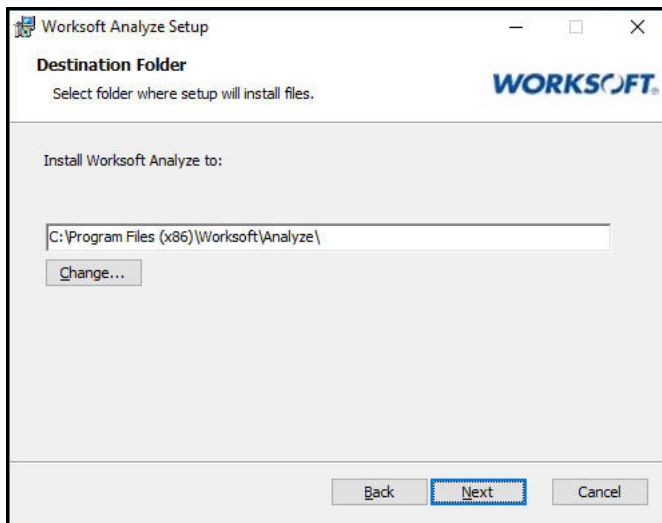
- 1 In your software distribution folder, double-click the **WorksoftAnalyze.exe** file.

The Worksoft Analyze Install Wizard opens.



- 2 Click **Next**.

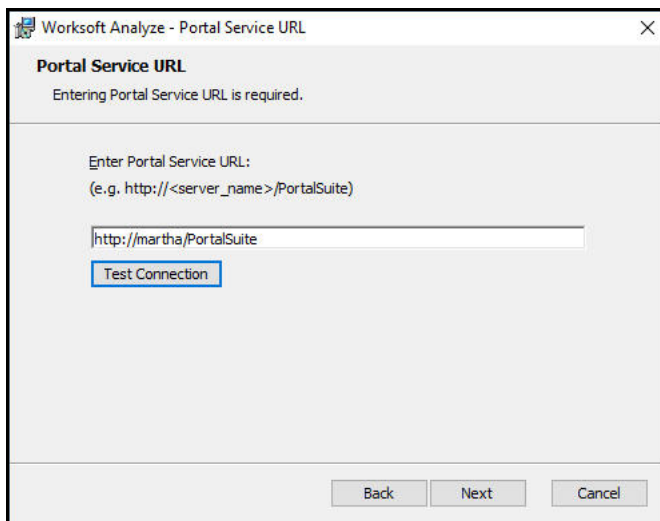
When the system analysis has completed, the Destination Folder page appears.



- 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 Portal Service URL page appears.



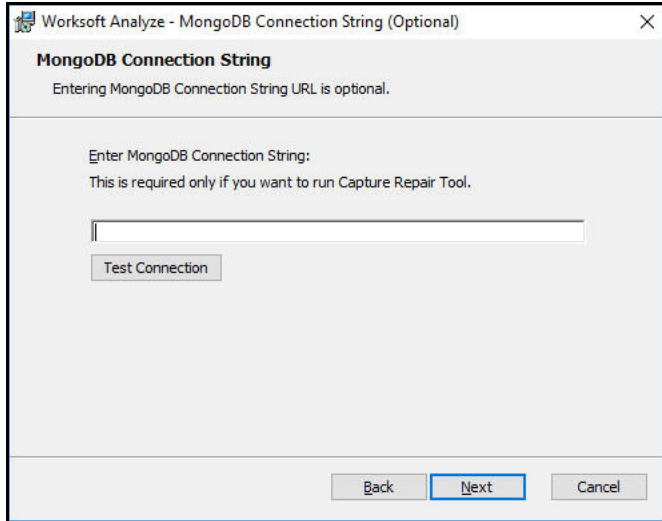
- 4 Enter the external URL address for your Worksoft Portal.

- 5 Click **Test Connection**.

If the connection was successful, a message appears confirming the connection.

- 6 Click **OK**.

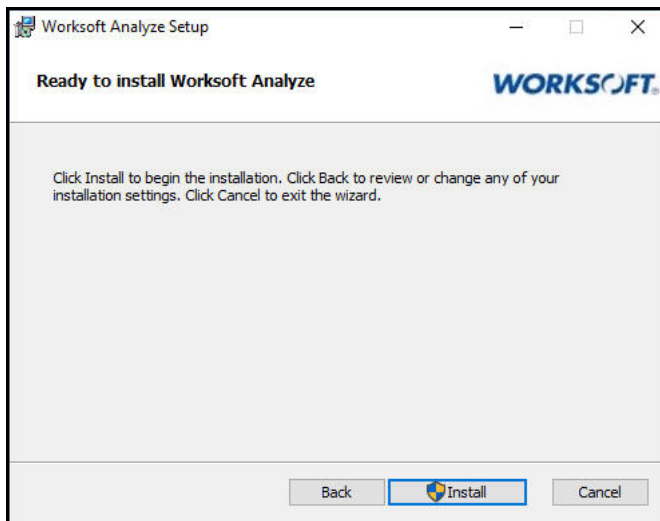
The MongoDB Connection String page appears if you are upgrading Worksoft Analyze. If you are not upgrading, go to [Step 8](#).



- 7** If you are upgrading Worksoft Analyze, enter your database connection string in the MongoDB Connection String field and click **Next**.

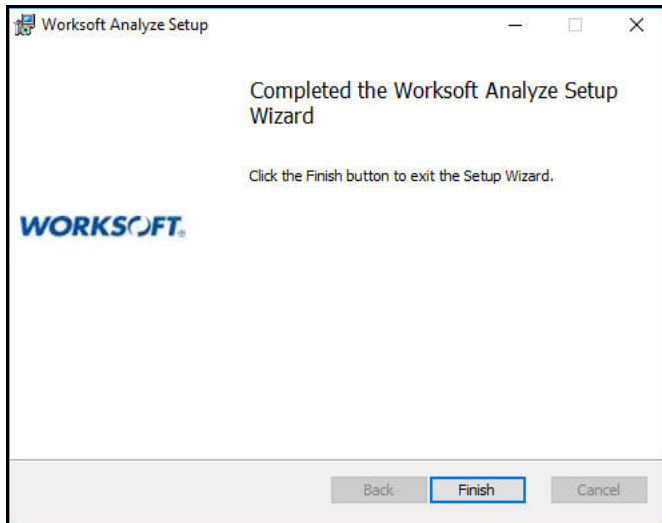
Example: `mongodb://username:password@servername/analyze`

The Ready to Install page appears.



- 8** Click **Next**.

The Worksoft Analyze Installation Completed page appears.



- 9 Click **Finish** to complete the installation.
- 10 After Worksoft Analyze is installed, navigate to the Analyze external URL to register it with the Worksoft Portal with the correct URL and not the localhost.

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## Configuring the MongoDB Server

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MongoDB should be installed on the server where Worksoft Analyze is installed. The MongoDB server stores Worksoft Capture processes that are imported by the Worksoft Analyze Automatic Generation Document feature.

► **To configure MongoDB server:**

- 1 From the Start menu, run **services.msc** to open the Windows Services Manager.
- 2 Find the MongoDB service and enable the service.
- 3 Close the Services Manager.
- 4 Open the Windows File Manager and navigate to the following folder:  
`C:\Program Files (x86)\Worksoft\Worksoft Analyze\Database.`
- 5 Copy the **configuremongo.bat** and **addanalyzeusers.js** files and paste them to the MongoDB server in the following folder:  
`C:\Program Files\MongoDB\Server\4.0\bin`  
The **configuremongo.bat** file creates the Analyze database and users.  
The **addanalyzeusers.js** file provides the username and password configurations for the Analyze users.
- 6 Double-click the **configuremongo.bat** file to run it.  
When you run the file, the following occurs:
  - A database named **Analyze** is created.
  - A collection named **Captures** in the Analyze database is created.
  - An administrator user with read and write roles is created in the Analyze database.

- A user named **analyzeuser** with read and write roles is created in the Analyze database

7 Open the Services Manager window.

8 Stop the MongoDB service.

9 Go to the following directory:

`C:\Program Files\MongoDB\Server\4.0\bin`

10 Open the **mongod.cfg** file in Notepad to edit the settings.

```

1 # mongod.conf
2
3 # for documentation of all options, see:
4 # http://docs.mongodb.org/manual/reference/configuration-options/
5
6 # Where and how to store data.
7 storage:
8   dbPath: C:\Program Files\MongoDB\Server\4.0\data
9   journal:
10     enabled: true
11 # engine:
12 # mmapv1:
13 # wiredTiger:
14
15 # where to write logging data.
16 systemLog:
17   destination: file
18   logAppend: true
19   path: C:\Program Files\MongoDB\Server\4.0\log\mongod.log
20
21 # network interfaces
22 net:
23   port: 27017
24   bindIp: 127.0.0.1
25
26 #processManagement:
27
28 security:
29   authorization: enabled
30
31 #operationProfiling:
32
33 #replication:
34
35 #sharding:
36
37 ## Enterprise-Only Options:
38 #auditLog:
39
40 #snmp:

```

If you want to bind to a single IP address, see the [MongoDB reference guide](#).

11 Update the Security authorization setting to **enabled**.

The Security authorization setting must be entered exactly as it is shown in the photo. You must have two spaces before **authorization:**, and one space before **enabled** with no trailing spaces.

#### Example:

**security:**

**authorization: enabled**

12 Enable the MongoDB service.

Make note of the MongoDB connection string because it will be needed when running the Worksoft Analyze installer.

**Example:** `mongodb://username:password@servername/analyze`

13 Close the Services Manager.



**Note:** To connect to your MongoDB instance, use a product, such as [Robo 3T](#).

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## Using HTTPS on Your Application Server

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In order to import generated Worksoft Analyze Captures into Certify, you need to use HTTPS on your application server and leave the HTTP binding on default port 80. After you have reconfigured the application server to use HTTPS, the port will now default to 443. You will need both ports open.

In order to use HTTPS on your application server, you will need to do the following:

- ◆ Request an SSL Certificate from your IT department.
- ◆ Add the certificate to IIS.
- ◆ Add new binding to port 443.
- ◆ Configure your database in the Worksoft Management Studio.
- ◆ Verify your SSL Settings on your application server.

Before you begin your configuration, verify that your application server has been set up and working with HTTP.

► **To verify your SSL Settings on your application server:**

- 1 Open the IIS Manager on your application server.
- 2 In the IIS Connections pane, select **Sites > Default Web Site > Portal**.
- 3 In the middle pane, double-click **SSL Settings**.
- 4 Verify that the **Require SSL** option is not selected.
- 5 Close the IIS Manager.

## Using HTTP on Your Application Server

Worksoft recommends that you use HTTPS on your application server. If you do not use HTTPS, then you will need to update the web.config file located in the following directory:

C:\Program Files (x86)\Worksoft\Worksoft Analyze\Web\web.config file

In the configuration file, find the line:

```
<httpCookies httpOnlyCookies="true" requireSSL="true" sameSite="Strict" />
```

Change `requireSSL="true"` to `requireSSL="false"`

Example:

```
<httpCookies httpOnlyCookies="true" requireSSL="false" sameSite="Strict" />
```



---

## Configuring Worksoft Portal

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Worksoft Analyze leverages information from the Worksoft Portal. After you have installed Worksoft Analyze, you will need to configure the following in Worksoft Portal:

- ◆ Create a Worksoft Portal database
- ◆ Register your MongoDB database
- ◆ Add Worksoft licenses
- ◆ Register users
- ◆ Configure your email service
- ◆ Configuring multiple tenant spaces

For information on how to configure the Portal, see the [Worksoft Help Portal](#).



# Chapter 3                      Upgrading Worksoft Analyze

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## Overview

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If you are upgrading to Worksoft Analyze v12, you need to complete the following tasks:

1. Install **Worksoft Portal** with the Worksoft Authorization service

This version of Analyze no longer leverages information from the Worksoft Management Studio. The Worksoft Management Studio has been replaced by the Worksoft Portal.

The Worksoft Portal is an administration tool that registers MongoDB database settings, licenses, users, and email SMTP settings that Analyze leverages. Download the software from the [Worksoft Customer Portal](#), and for specific system requirements and installation guide, see the [Worksoft Help Portal](#).

2. Run the Worksoft Analyze installer from the distribution package. For more information, see ["Installing Worksoft Analyze" on page 17](#).

During the installation process, you will be asked to enter your MongoDB connection string in [Step 7](#). No MongoDB update is required.

3. Use the **Worksoft Analyze Migration** tool to migrate your data from your SQL Server to the MongoDB database.
4. Use the **User Migration** tool to migrate your users from the Worksoft Management Studio database to the Worksoft Portal database.
5. Use the **Update Analyze MongoDB** tool to update existing user and tenant IDs in MongoDB with new Global Unique Identifiers (GUID) created in the Worksoft Portal database.

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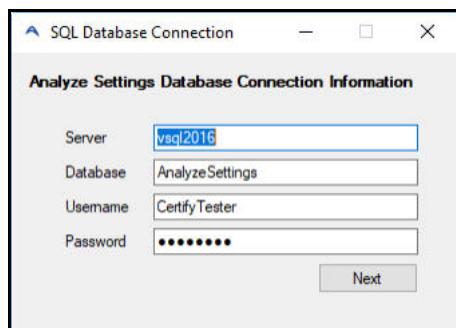
## Migrating Data from SQL Server to MongoDB

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With this version of Worksoft Analyze, a SQL Server is no longer required. The Worksoft Analyze Migration tool assists you in migrating data to your existing MongoDB database.

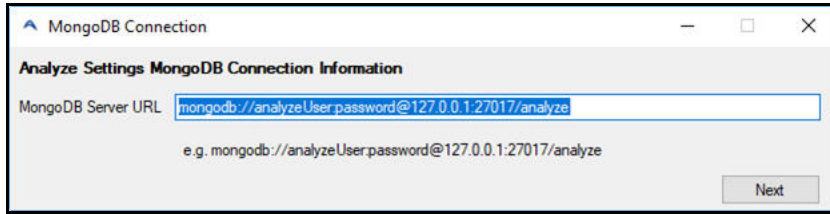
### ► *To migrate data with the Worksoft Analyze Migration tool:*

- 1 Double-click on the **AnalyzeSettingsMigration.exe** file that is located in the following directory:  
C:\Program Files (x86)\Worksoft\Analyze\Utilities\AnalyzeSettingsMigration  
The SQL Database Connection dialog box opens.



- 2 Enter the SQL Server connection details.
- 3 Click **Next**.

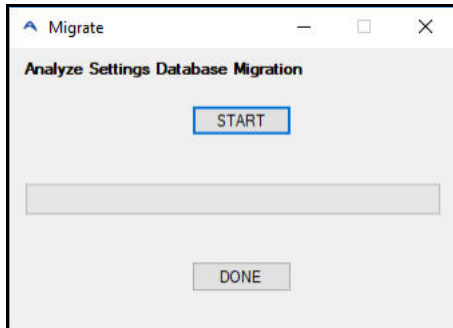
The SQL database connection is validated, and the MongoDB Connection dialog box opens.



4 Enter your MongoDB connection URL.

5 Click **Next**.

The MongoDB URL is validated, and the Analyze Settings Database Migration dialog box opens.



6 Click **Start** to begin the migration process.

After the database migration has completed, a message appears stating that the migration was successful.

7 Click **OK**.

---

## Migrating Users

---

The **User Migration** tool helps you migrate your users from the Worksoft Management Studio database to the Worksoft Portal database.

► **To migrate users:**

1 Double-click on the **UserMigration.exe** file that is located in the following directory:

C:\Program Files (x86)\Worksoft\Authentication\Utility

The User Migration tool opens.

2 In the Worksoft Management Studio Database Connection fields, enter your database information.

3 Click **Next**.

4 In the Worksoft Portal Database Connection fields, enter your database information.

5 Click **Next**.

The tenants from the Worksoft Management Studio are displayed.

- 6 Select which tenants you want to migrate to the Worksoft Portal.

Only users assigned to the selected tenants will be migrated.

- 7 Click **Migrate**.

After the migration is complete, a list of tenants, users, and licenses that were successfully migrated are shown.

Two comma-separated values (CSV) files, **users.csv** and **tenants.csv**, are created. You will use these files to update user and tenant IDs with the **Update Analyze MongoDB** tool.

---

## Update Existing User and Tenant IDs

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The **Update Analyze MongoDB** tool updates existing user and tenant IDs in MongoDB with new GUID created in the Worksoft Portal database. This tool allows data from the MongoDB to associate with users and tenants in the Portal.

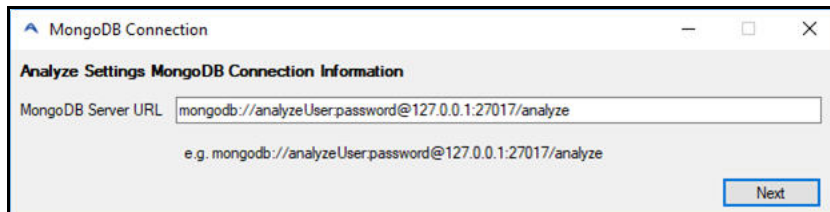
Before you can update your existing user and tenant IDs to GUIDs, you need to have migrated your users and tenants from Worksoft Management Studio to the new Worksoft Portal database. The CSV files created with the Worksoft Analyze Migration tool will be used in this process.

### ► To update existing user and tenant IDs:

- 1 Double-click on the **UpgradeAnalyze.exe** file that is located in the following directory:

C:\Program Files (x86)\Worksoft\Analyze\Utilities\UpgradeAnalyze

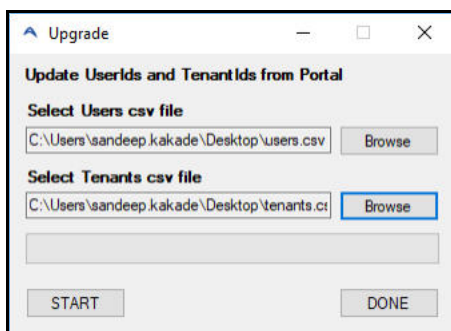
The Analyze Settings MongoDB Connection Information dialog box opens.



- 2 Enter your MongoDB Server URL.

- 3 Click **Next**.

The Update User Ids and Tenant Ids from Portal dialog box opens. You will need to add the CSV files that the Worksoft Analyze Migration tool created.



- 4 Click the **Select Users CSV File Browse** button to browse to the directory where the users.csv file is located:

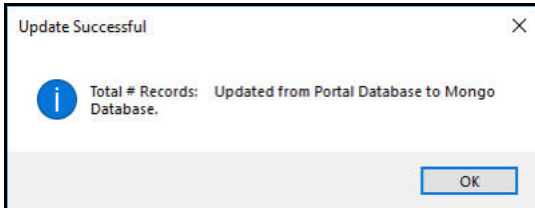
C:\Program Files (x86)\Worksoft\Analyze\Utilities\AnalyzeSettingsMigration

- 5** Click the **Select Tenants CSV File Browse** button to browse to the directory where the tenants.csv file is located:

C:\Program Files (x86)\Worksoft\Analyze\Utilities\AnalyzeSettingsMigration

- 6** Click the **START** button to begin updating the IDs.

If the process is successful, a message appears.



- 7** Click **OK**.



## Appendix A      Worksoft Analyze Silent Installation

### Silent Install

To run Worksoft Analyze installation silently, run the installer from the command line and add **/s** option to the executable:

```
WorksoftAnalyze.exe /s
```

### Installation Log File

The default installation log is located at **%userprofile%** of the user who installed Worksoft Analyze. If you want to override the install log file location, enter the following string to provide an override for install log file location:

```
WorksoftAnalyze.exe /s /l=C:\temp\AnalyzeInstalllog.txt
```

### Silent Uninstall

To uninstall Worksoft Analyze silently, run the installer from the command line and enter the following string:

```
WorksoftAnalyze.exe /s MODIFY=FALSE REMOVE=TRUE UNINSTALL=YES
```