Perspective™
by PPM

Workflow

INSTALLATION GUIDE

Perspective by PPM™

Version 2.0

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Overview*

Perspective Workflow™ is a business activity monitoring application that works behind the scenes to help you stay on top of Perspective's reported incidents, ongoing investigations and current assignments. It monitors and auto-responds to critical, time-sensitive data, automatically notifying the necessary personnel and guiding team members through the proper processes and protocols.

To get Perspective Workflow up and running, please follow the instructions provided throughout this guide, in order of appearance.

Minimum System Requirements

Web Services Server

Available Disk Space†

- 1 GB

Processor Speed

- Minimum: 2 GHz
- Recommended: 3 GHz+

Memory

- Minimum: 1 GB
- Recommended: 2.5 GB+

Operating System

- Minimum: Windows Server® 2003 with SP 1
- Recommended: Windows Server 2003 with SP 2

.NET Framework

- Version 3.5 SP 1

IIS (Internet Information Services)

- IIS 6.0, WSE 3.0

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* This document is only applicable to organizations that have purchased Perspective Workflow, an optional module for Perspective by PPM 2000. If you are not certain that your Perspective system includes Workflow, please contact Customer Service for verification.

† Depending on the size of your Perspective database, more disk space may be required.

Database Setup

The Perspective Workflow database setup procedure depends on what version of Perspective your organization is using and whether the Workflow setup is new or existing. Refer to the appropriate procedure of the three below to correctly setup your database.

New Workflow Setup – Perspective 4.0 and Later

Follow this procedure if setting up Workflow for the first time and using Perspective 4.0 or later.

1. Open Microsoft® SQL Server® Management Studio.

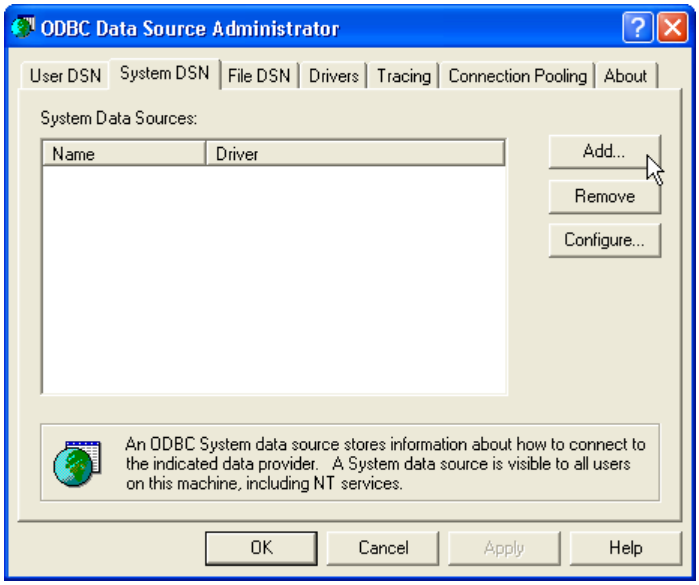
2. Run the database views script **PWFDataViews_v2.0.sql** against the Perspective database being used with Perspective Workflow.

ODBC Connection Setup

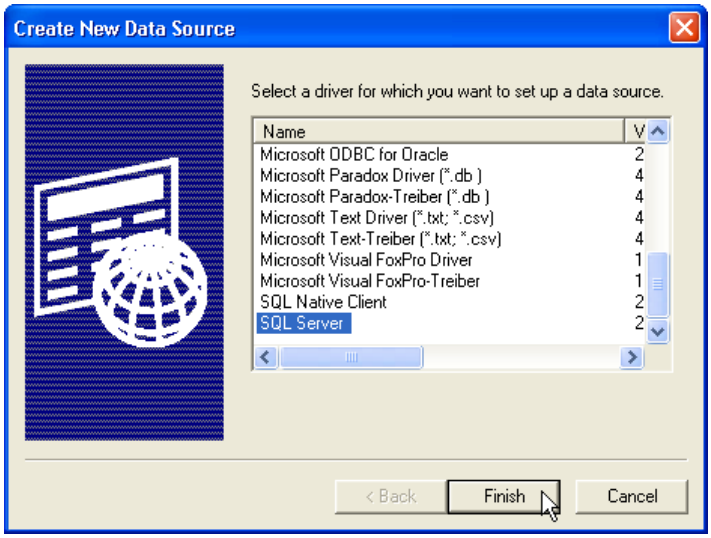
1. Select **Start > Administrative Tools > Data Sources (ODBC)**.

   *Note: Perspective Workflow uses the 32 bit ODBC manager regardless of whether you are running Workflow on a 32 bit or 64 bit machine. On 64 bit machines, the 32 bit ODBC device manager is typically located in the %winDrive/Windows/syswow64 directory and can be run by executing **ODBCAD32.exe**.*

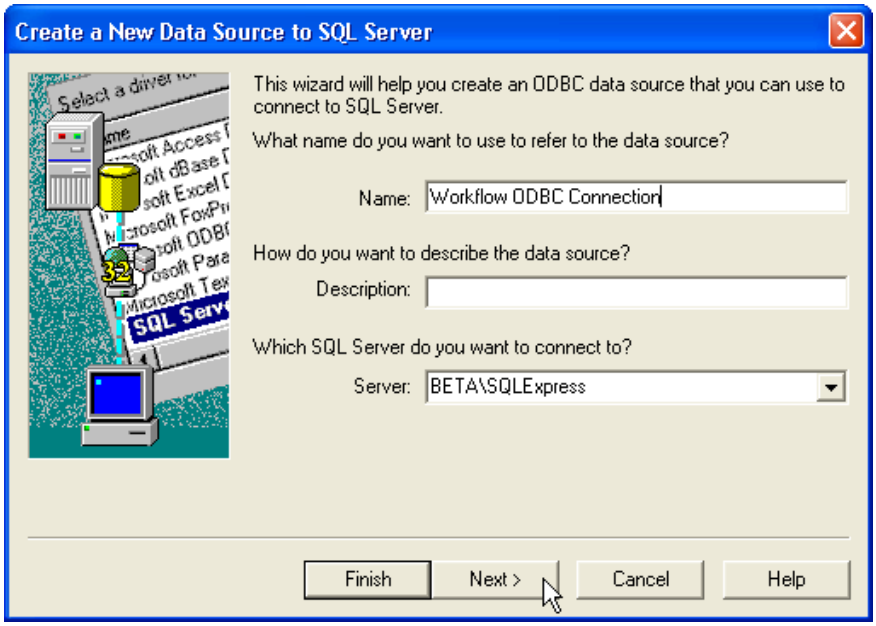
2. Select the **System DSN** tab and click **Add**.



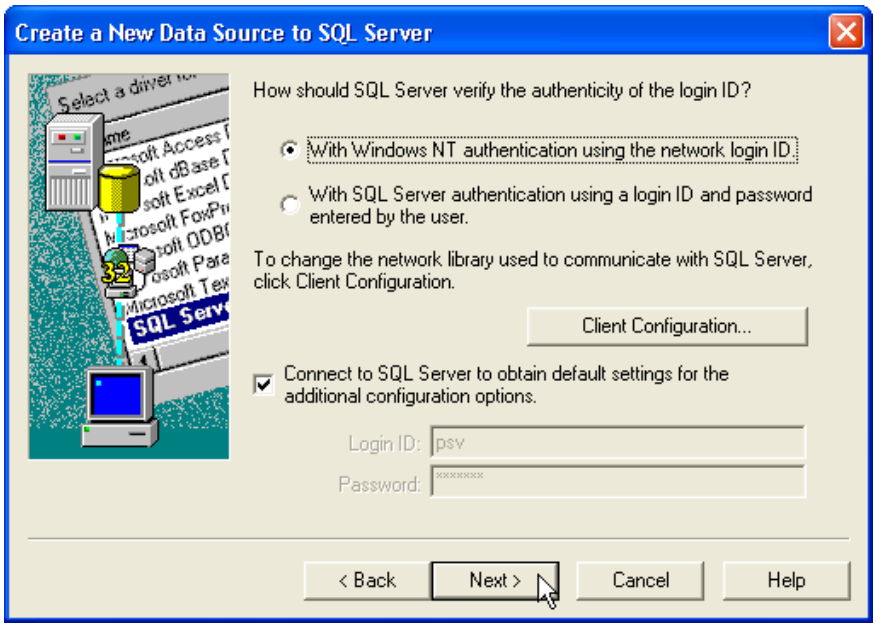
3. Select **SQL Server** and click **Finish**.



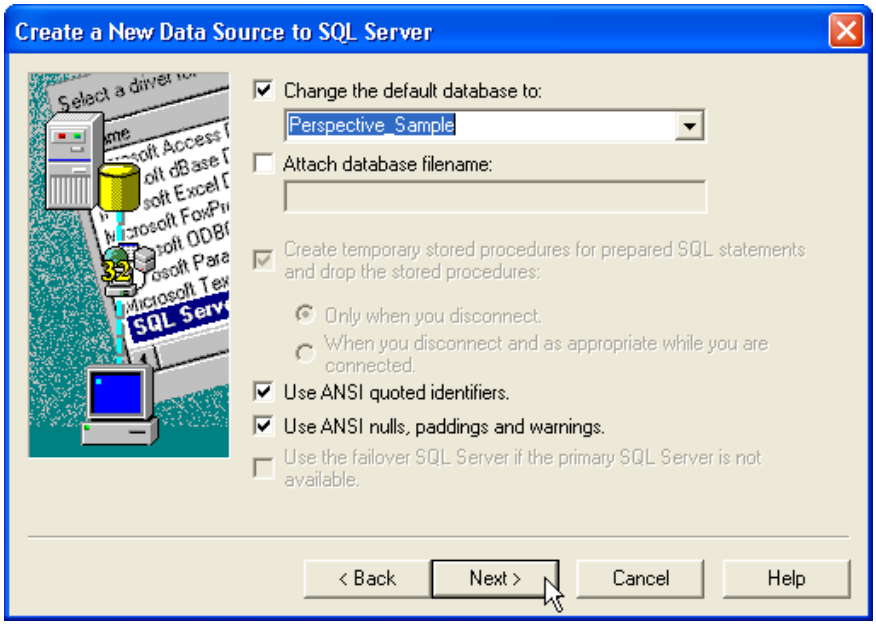
4. Enter a **Name** and **Description** for the ODBC connection; select the name of the SQL server that hosts your Perspective database; and click **Next**.



5. Choose the authentication mode you want to use for the ODBC connection (Windows authentication or SQL authentication), and click **Next**.

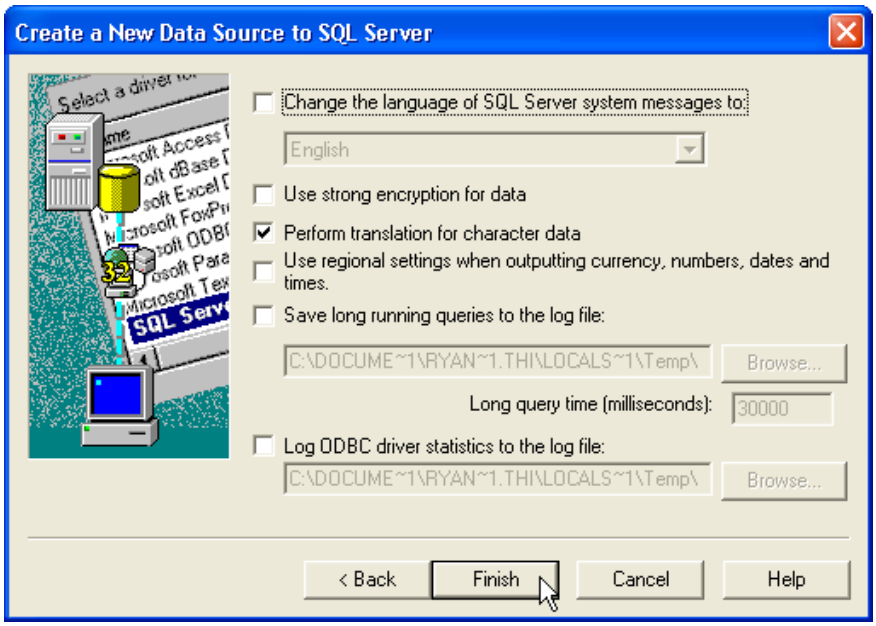


6. Select the **Change the default database to** box and choose the name of your Perspective database from the list below.

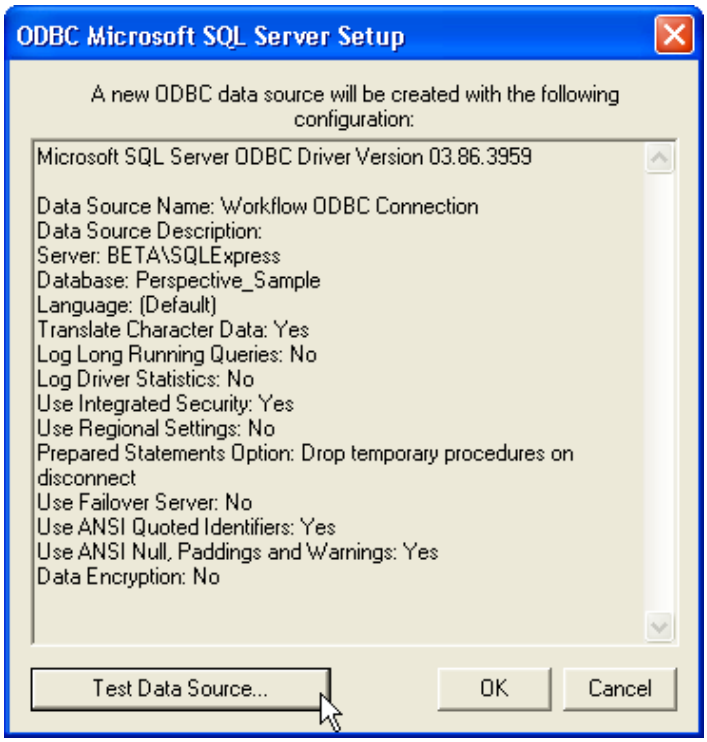


7. Ensure the **Use ANSI quoted identifiers** and **Use ANSI nulls, paddings and warnings** boxes are selected, and click **Next**.

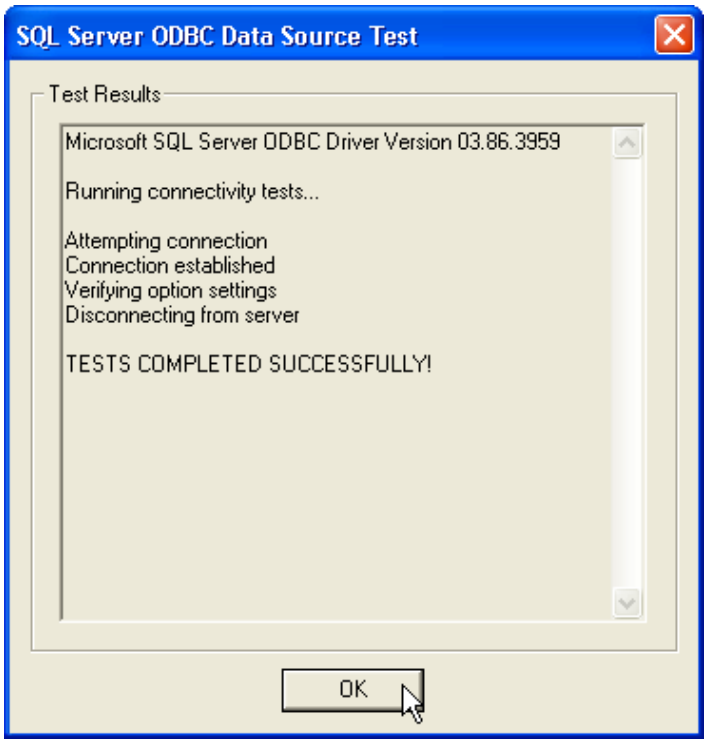
8. Click **Finish**.



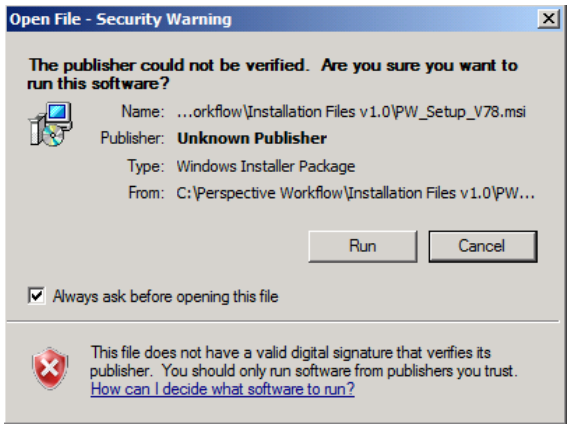
9. Click **Test Data Source**.

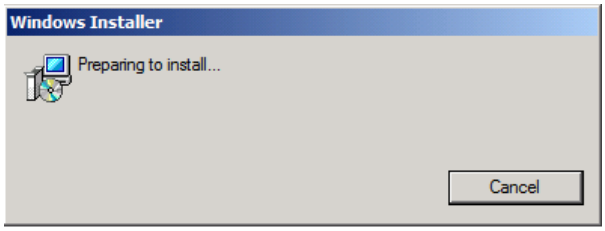


10. When the data source connectivity test is complete, click **OK**.



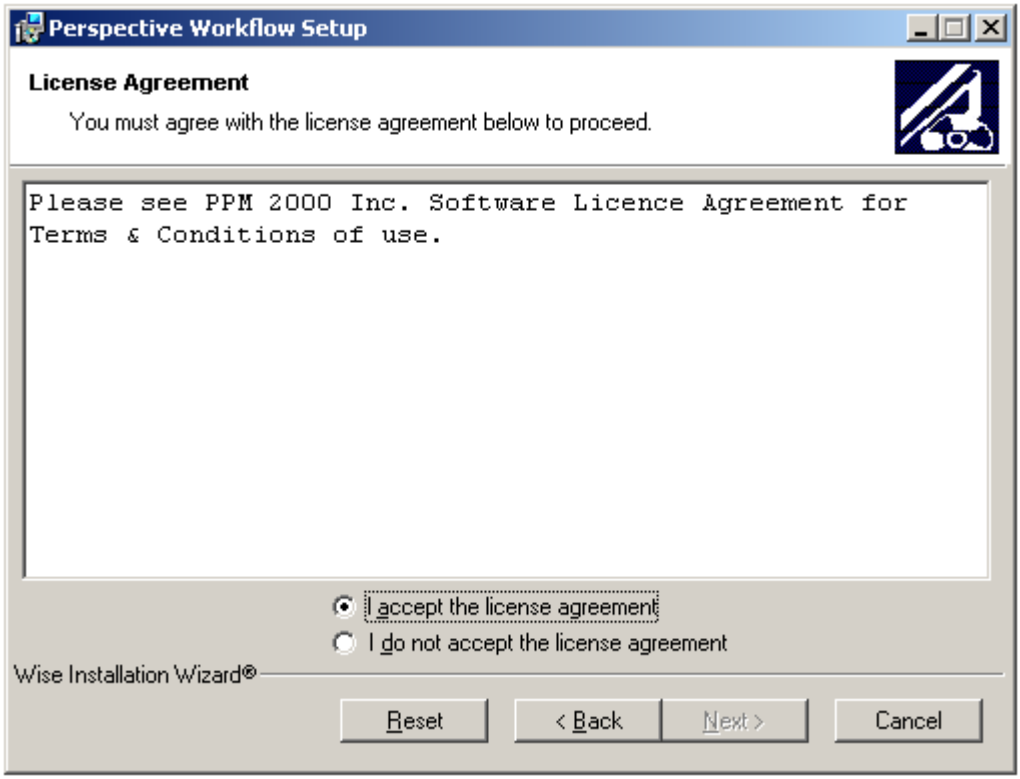
1. Perspective Workflow InstallationDouble-click the **PW_Setup_V82d.msi** file located inside the **Installation Files v1.0** folder; then click **Run**.



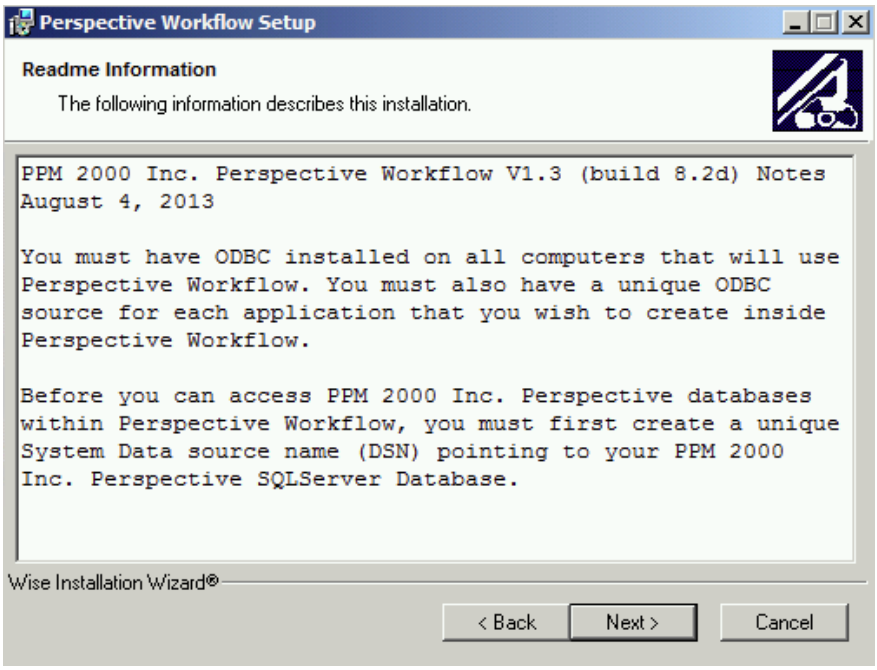


2. Click **Next**.

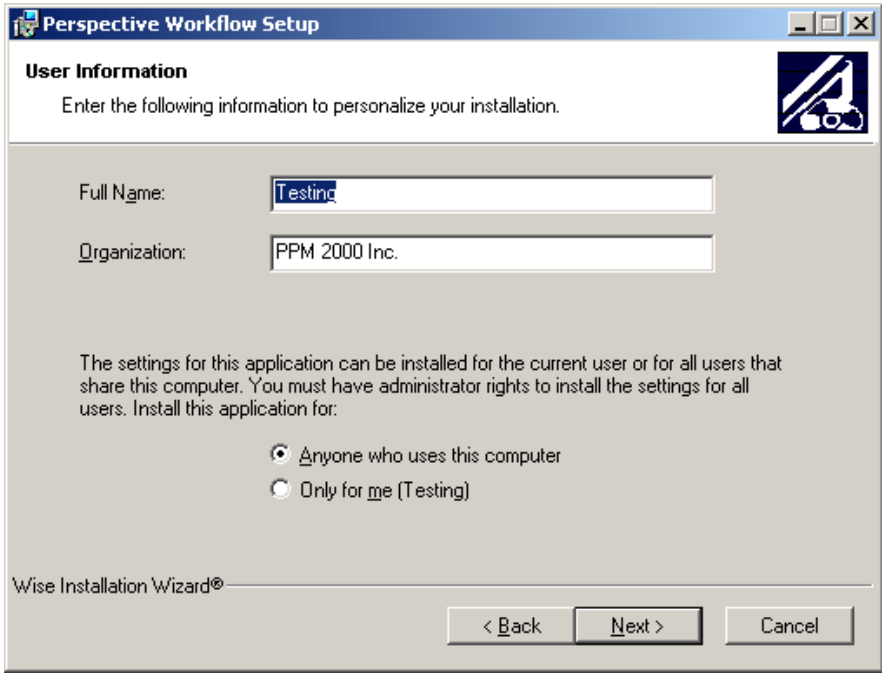
3. Select the **I accept the license agreement** radio button, and click **Next**.



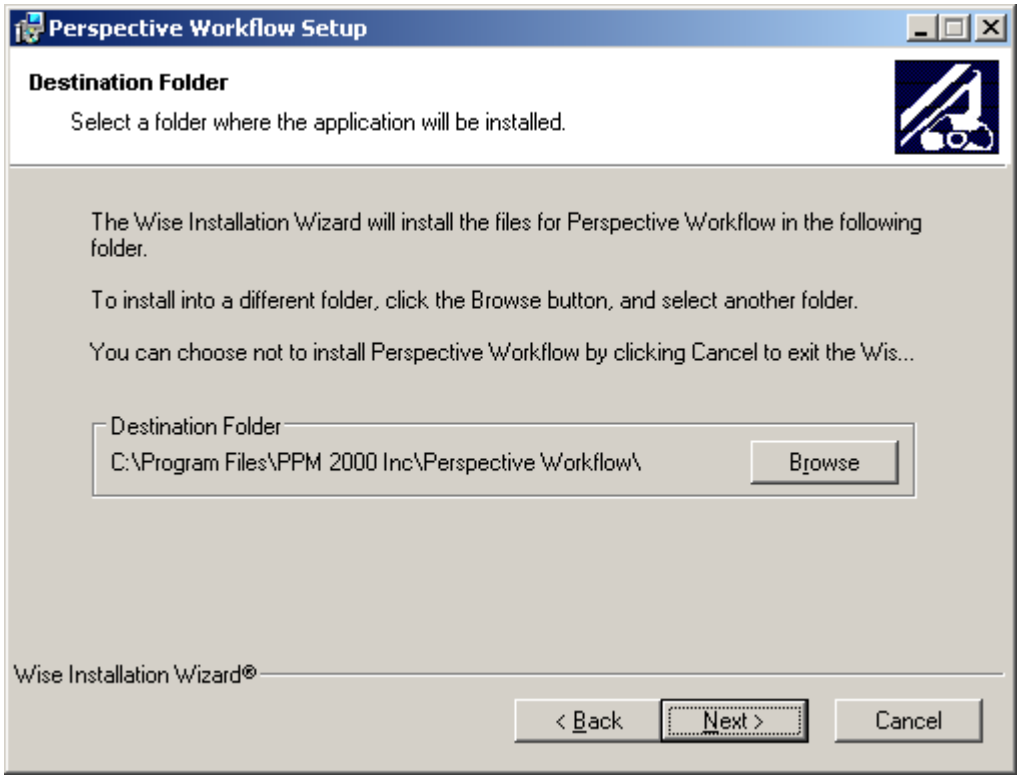
4. Read the installation information, and click **Next** to begin the install.



5. Enter your user information, and click **Next**.

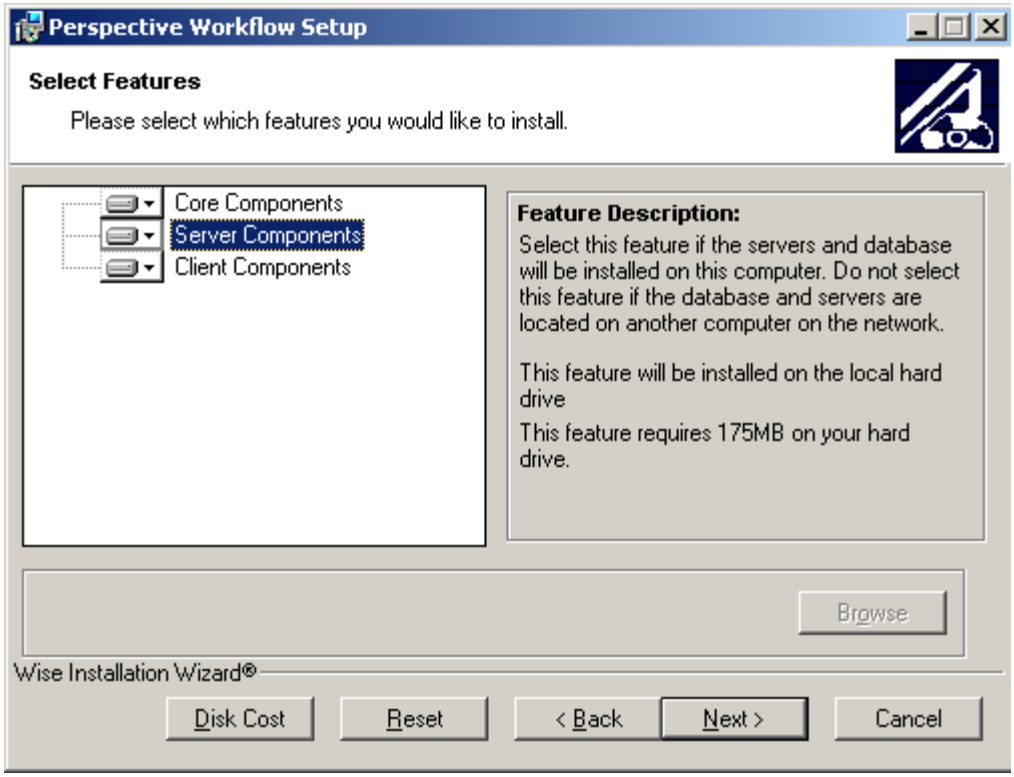


6. The default install destination will be displayed. (If a different location is preferred, use the **Browse** button to navigate to the chosen location.) Click **Next**.

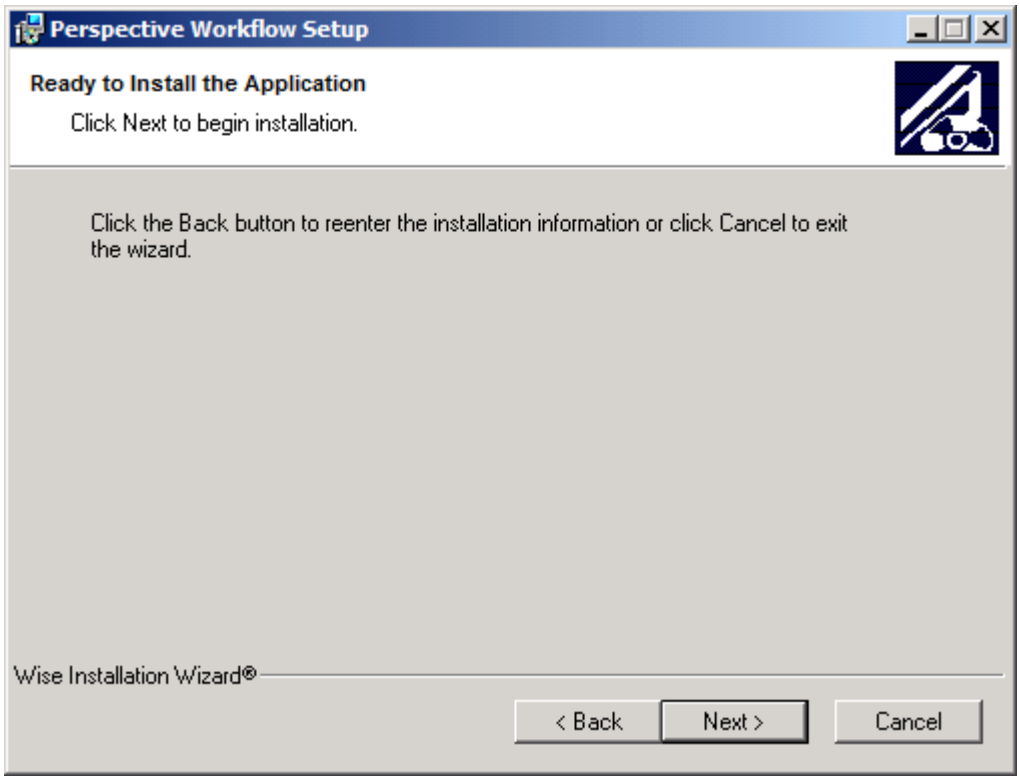


7. Accept the default settings for all components by clicking **Next**.

Note: Remote Perspective Workflow clients must be individually licensed in order to run the Workflow application. If you install one or more remote Perspective Workflow clients, you must only install the core and client components on each remote client. You will not need to specify the location of the Workflow database during the installation process; the first time that a remote client is executed, the user will receive a browse button allowing them to locate the Workflow database.

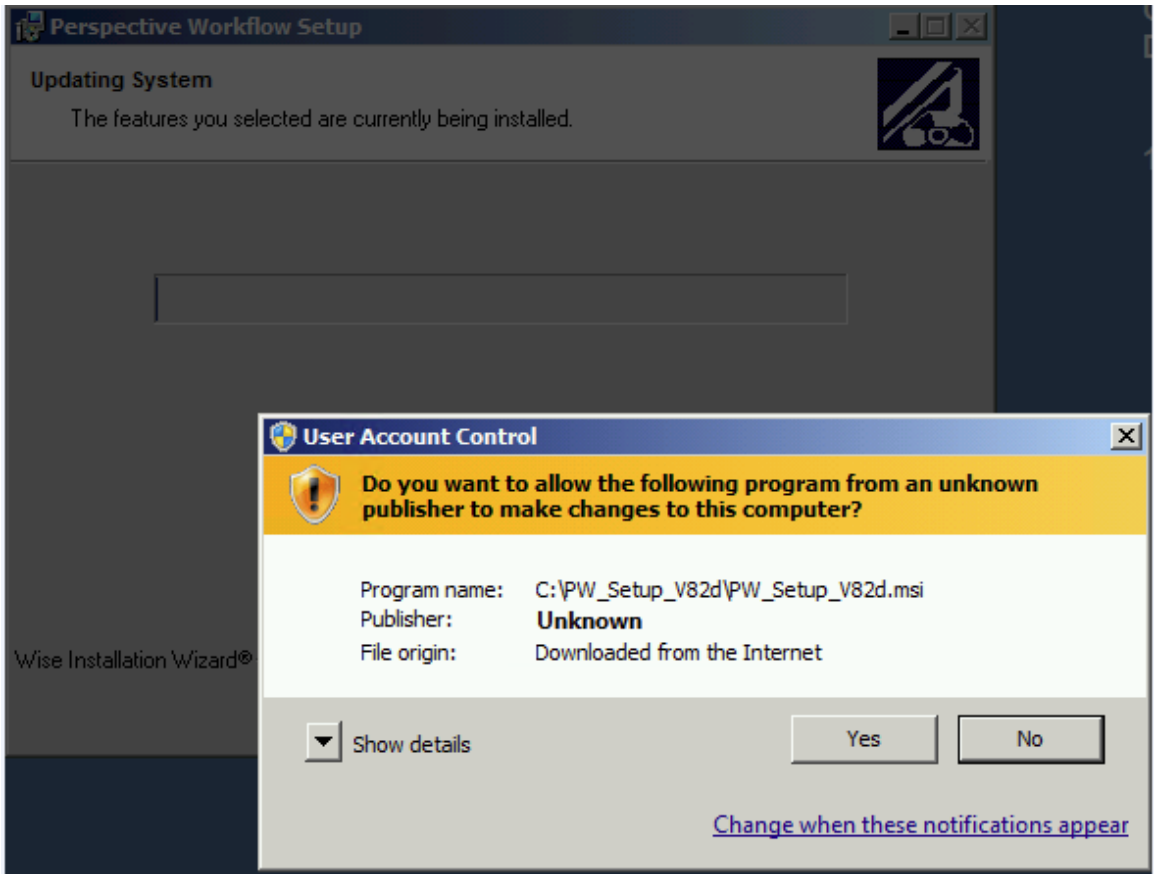


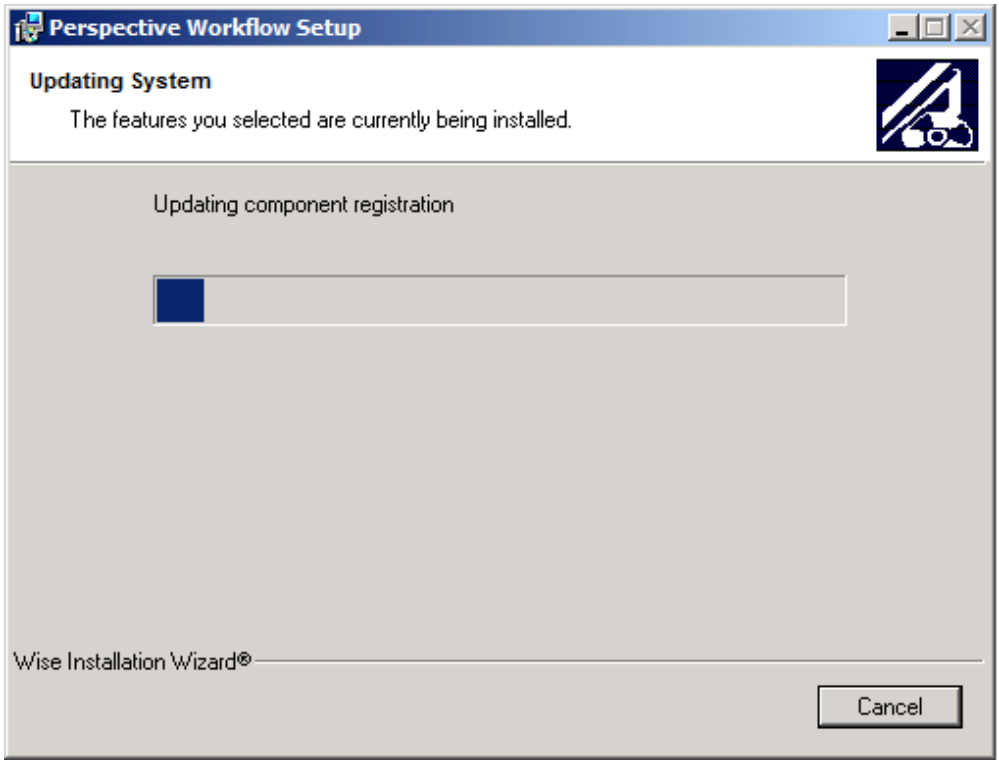
8. Click **Next** to begin the installation.



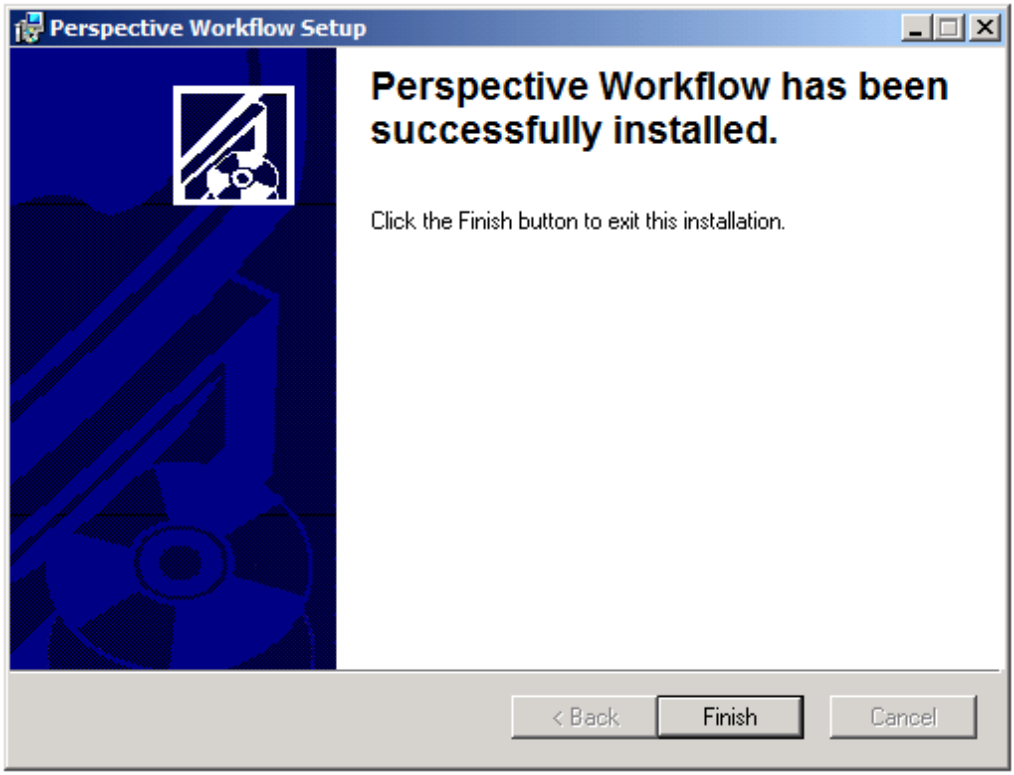
Note: *The service needs to run using an account that has local admin rights to the server where workflow is installed.*

9. If prompted to confirm the installation, click **Yes**.





10. Click **Finish** once the installation is complete.



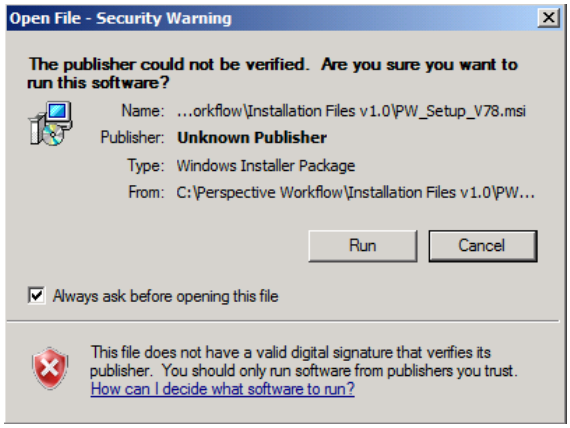
IM Installation

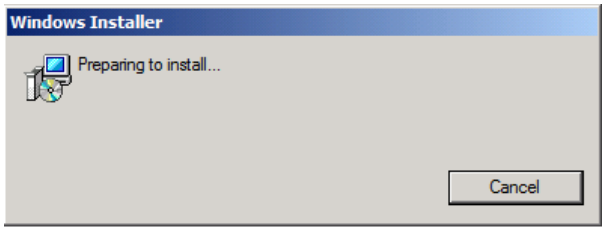
There are two IM installations: IM32 (for 32 bit machines), and IM64 (for 64 bit machines). As IM is optional, only install it if you will use it.

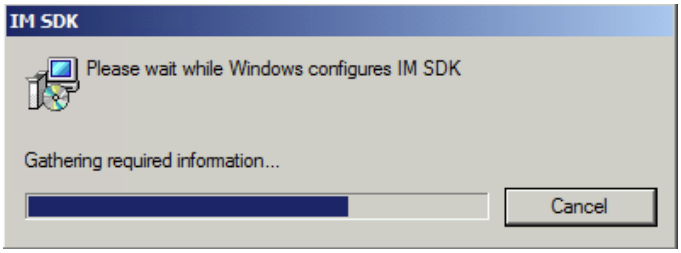
The IM Accounts option enables you to configure and maintain the Instant Message accounts from which you will send notifications. Note that you can configure multiple IM accounts using multiple IM methods, such as Windows Live Messenger, Google Talk, and ICQ, so that you can receive IM alerts via one method while at work and via a different method while at home.

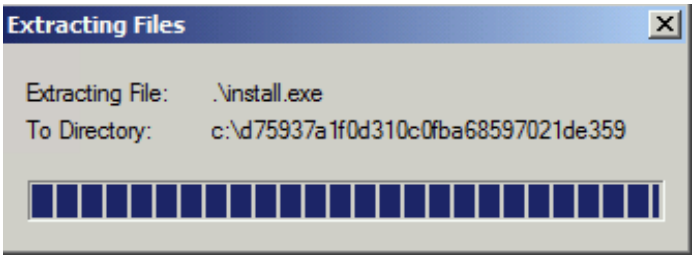
It is suggested that prior to setting up this account that you send IM “invitations” to all the recipients. Note that some IM providers (e.g., Windows Live Messenger) requires an IM recipient to “accept” invitations from an account before the messages can be successfully delivered, whereas other IM providers (e.g., ICQ) require “invitations” but do not require recipient acceptance.

1. Double-click the **PW_Setup_V82d.msi** file located inside the **Installation Files v1.0** folder; then click **Run**.





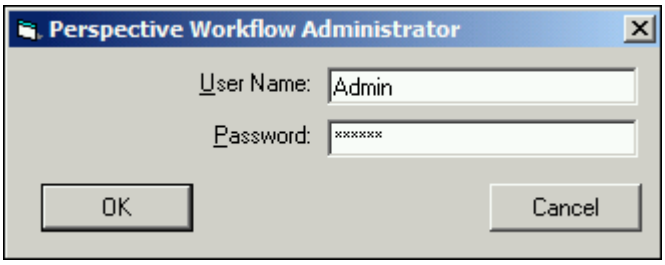

IM SDK
Please wait while Windows configures IM SDK
Gathering required information...
Cancel


Extracting Files
Extracting File: .\install.exe
To Directory: c:\d75937a1f0d310c0fba68597021de359

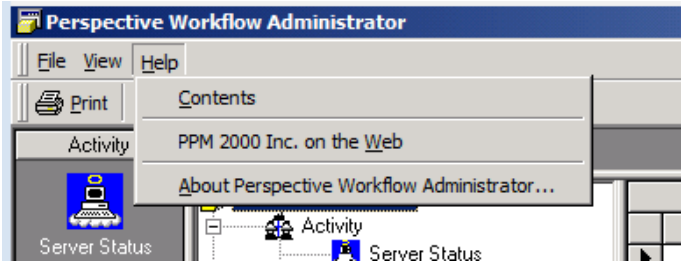
Licensing & Server Login Information

1. Open the Perspective Workflow Administrator. The application can generally be accessed through **Start > Programs > Perspective Workflow > Administrator**.

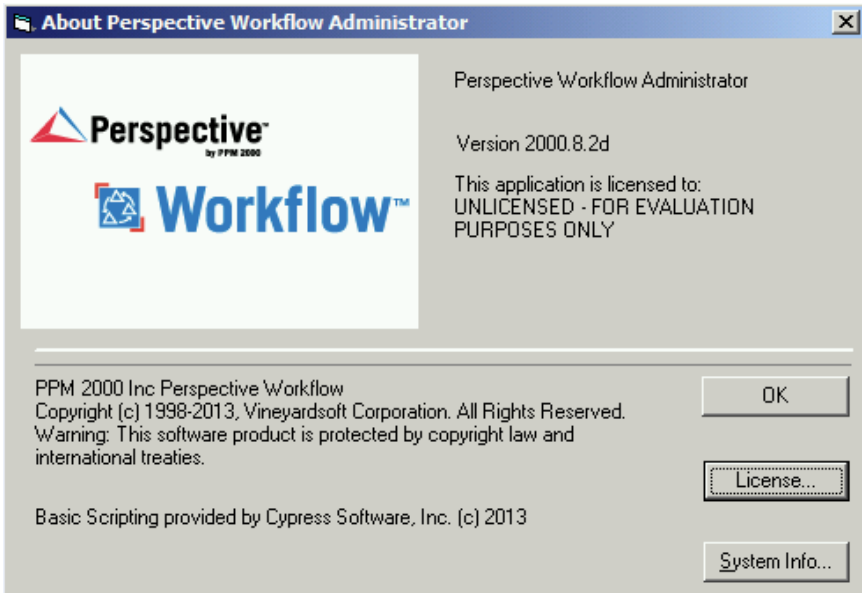
2. In the logon window, enter your administrator **User Name** and **Password**, then click **OK**. (The default User Name is **Admin** and the default Password is **master**.)



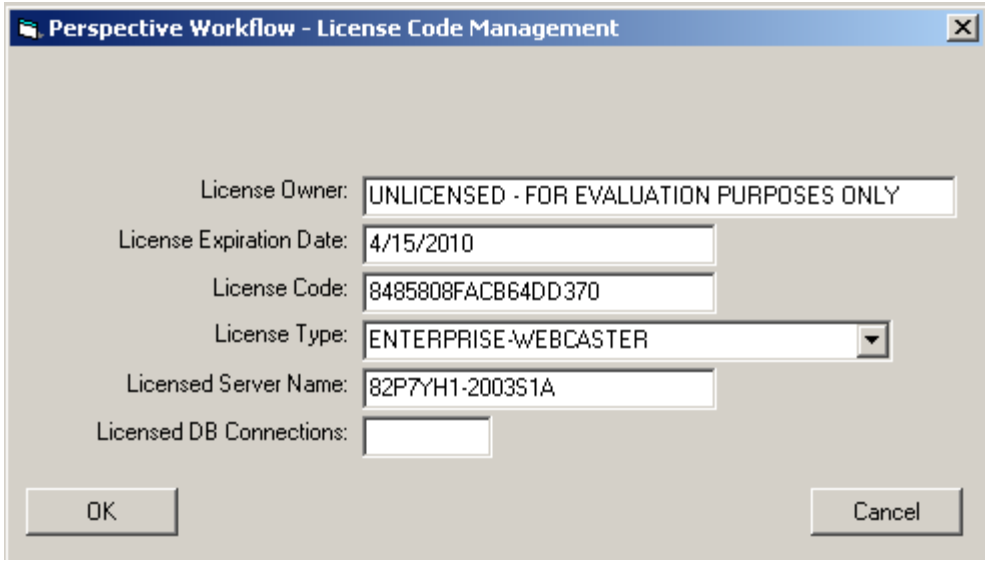
3. Under the **Help** menu, select **About Perspective Workflow Administrator**.



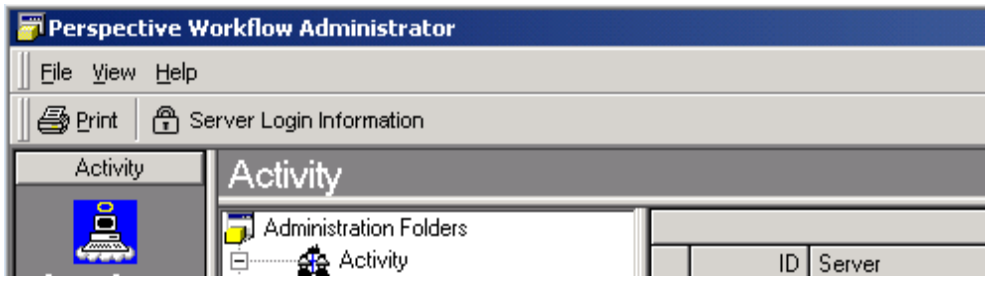
4. Click the **License** button.



5. Enter the license information provided to you by PPM 2000 and click **OK**, then **OK** again.

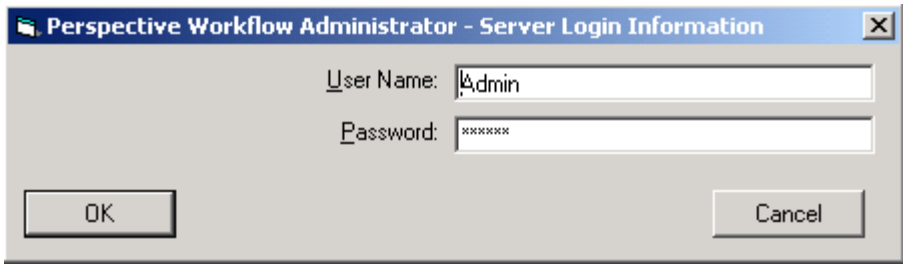


6. Click the **Server Login Information** button on the toolbar.



7. Enter your administrator **User Name** and **Password**, then click **OK**. (The default User Name is **Admin** and the default Password is **master**.)

Note: If the fields are pre-populated, delete the values and re-enter your login information.

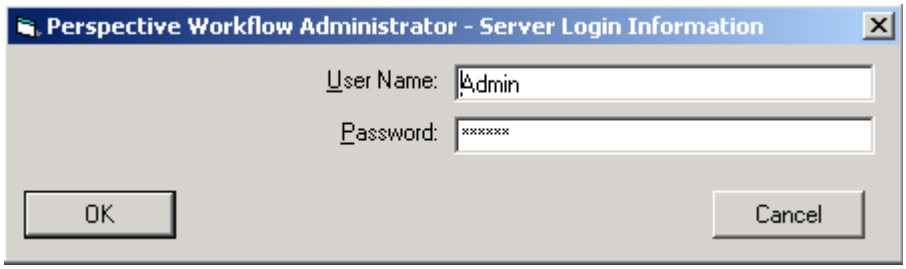


8. Close the Perspective Workflow Administrator; then, start the Perspective Workflow service in Computer Management.

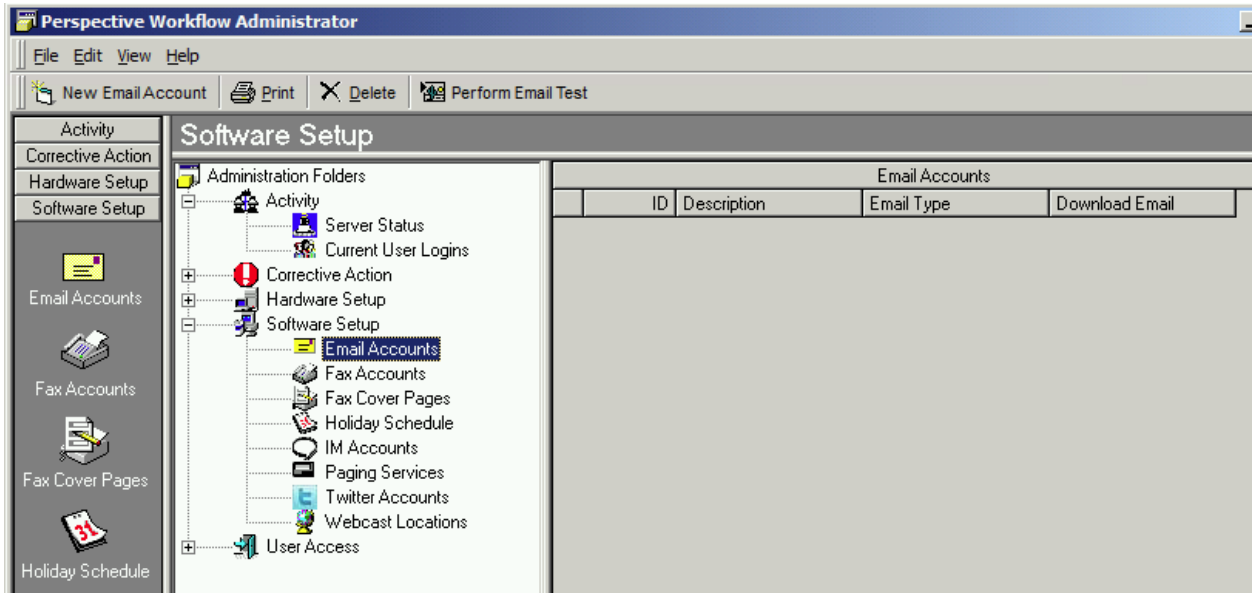
Email Setup

1. Open the Perspective Workflow Administrator. The application can generally be accessed through **Start > Programs > Perspective Workflow > Administrator**.

2. In the logon window, enter your administrator **User Name** and **Password**, then click **OK**. (The default User Name is **Admin** and the default Password is **master**.)



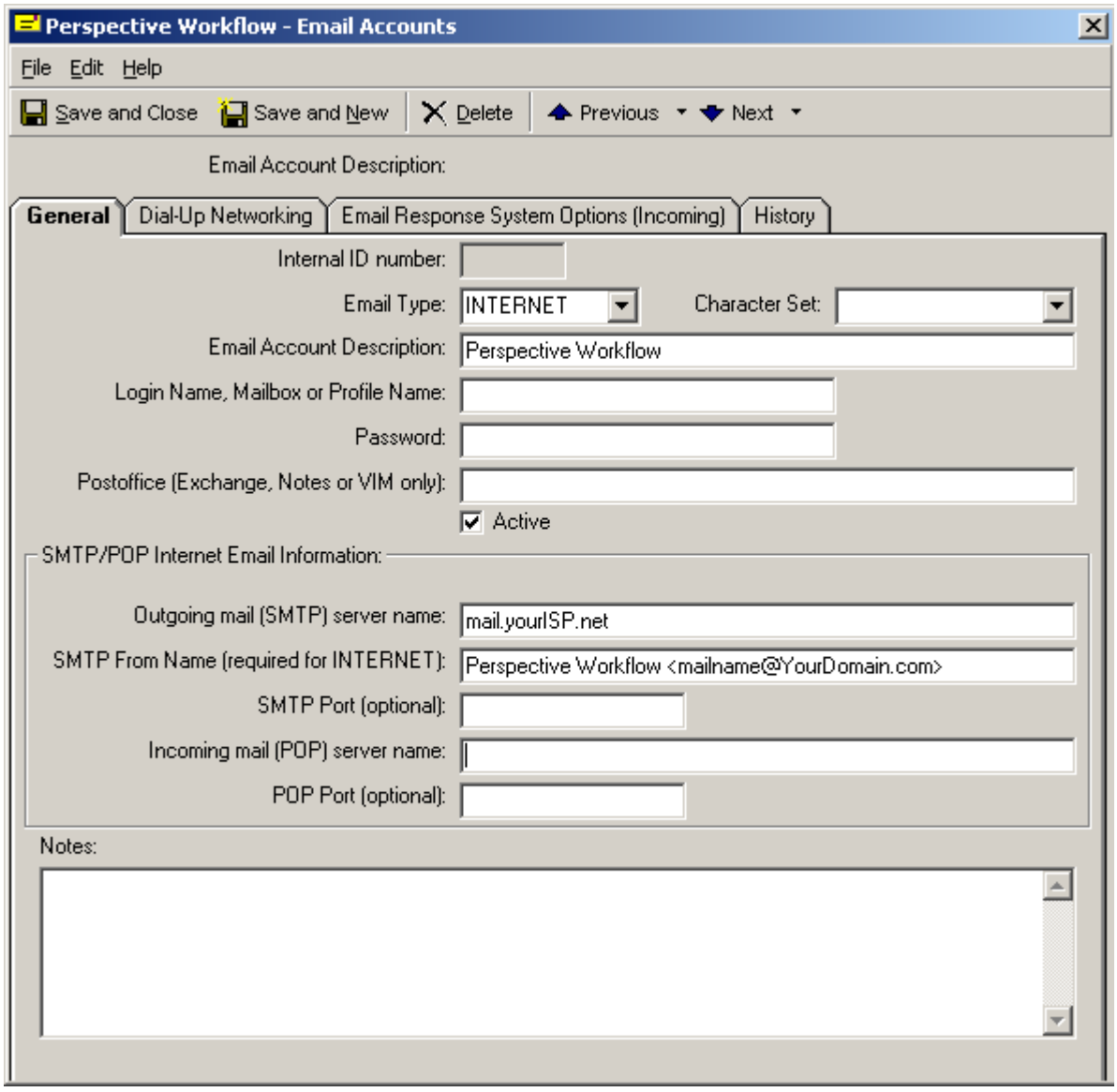
3. Expand the **Software Setup** node, click **Email Accounts** and click the **New Email Account** button in the top-left corner of the window.



4. Select **INTERNET** for the **Email Type** field; populate the **Email Account Description**, **Outgoing Mail (SMTP) Server Name** and **SMTP From Name** fields (the **SMTP From Name** field must be populated with a valid email address); ensure that the **Active** box is checked; and click **Save and Close**.

   Note: You must create a separate Perspective Workflow email account for each email address that you want email notifications to be delivered from. For instance, if you would like employees in different departments to receive email notifications from different email

accounts, you must create a Perspective Workflow email account for each department. (Keep in mind that each event can only use one email account to send notifications from.)



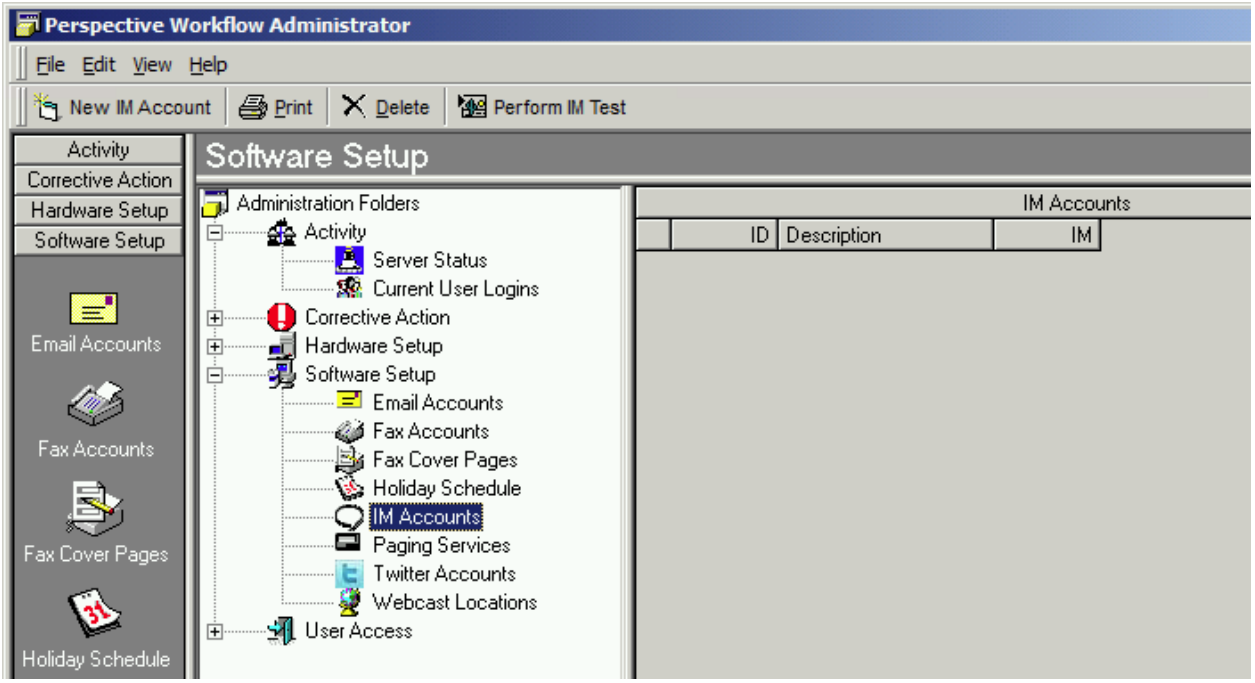
5. Close the Perspective Workflow Administrator.

IM Setup

1. Open the Perspective Workflow Administrator. The application can generally be accessed through **Start > Programs > Perspective Workflow > Administrator**.

2. In the logon window, enter your administrator **User Name** and **Password**, then click **OK**. (The default User Name is **Admin** and the default Password is **master**.)

3. Expand the **Software Setup** node, click **IM Accounts**.



4. **Service Provider**: Select from Windows Live Messenger, Google Talk, Yahoo! Messenger, and ICQ.

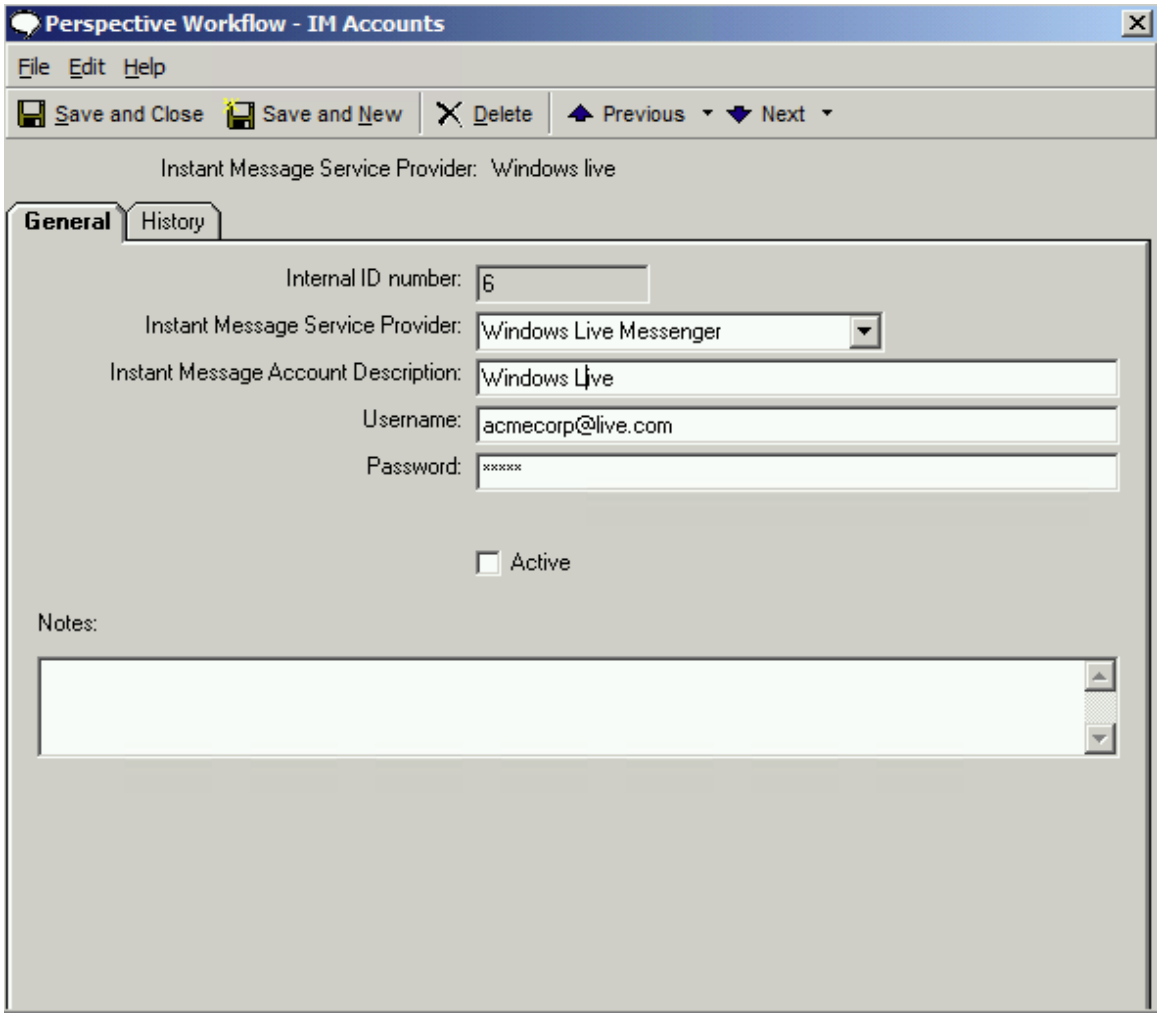
   Account Description: A description of the account that will be used for sending IM notifications.

   Username: The user name for this IM account. Note that different IM methods (such as Windows Live Messenger and ICQ) require different types of login information. Typically, Windows Live Messenger uses an email address whereas ICQ uses a unique numeric identifier. Please refer to the documentation/help text for your preferred IM provider for details.

   Password: The password of this IM account.

   Active: Whether this account is currently available for sending IM alerts (you can configure an account without enabling it for immediate use)

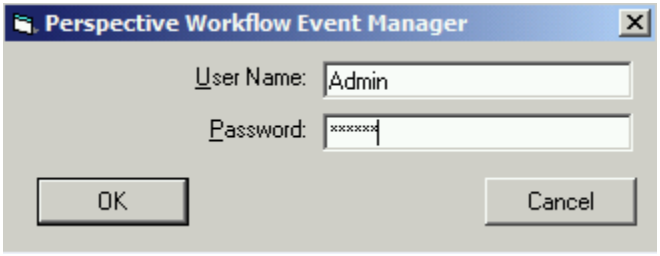
   Note: Each IM alert message may not exceed 1,500 characters (including spaces) in length.


Perspective Workflow - IM Accounts
File Edit Help
Save and Close
Save and New
Delete
Previous
Next
Instant Message Service Provider: Windows live
General
History
Internal ID number: 6
Instant Message Service Provider: Windows Live Messenger
Instant Message Account Description: Windows Live
Username: acmecorp@live.com
Password: *****
Active
Notes:

Perspective Workflow Event Pak Installation

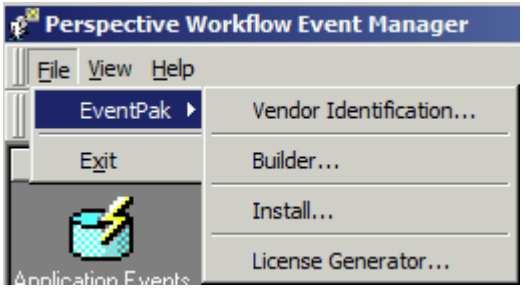
1. Open the Perspective Workflow Event Manager. The application can generally be accessed through **Start > Programs > Perspective Workflow > Event Manager**.

In the logon window, enter your administrator **User Name** and **Password**, then click **OK**. (The default User Name is **Admin** and the default Password is **master**.)

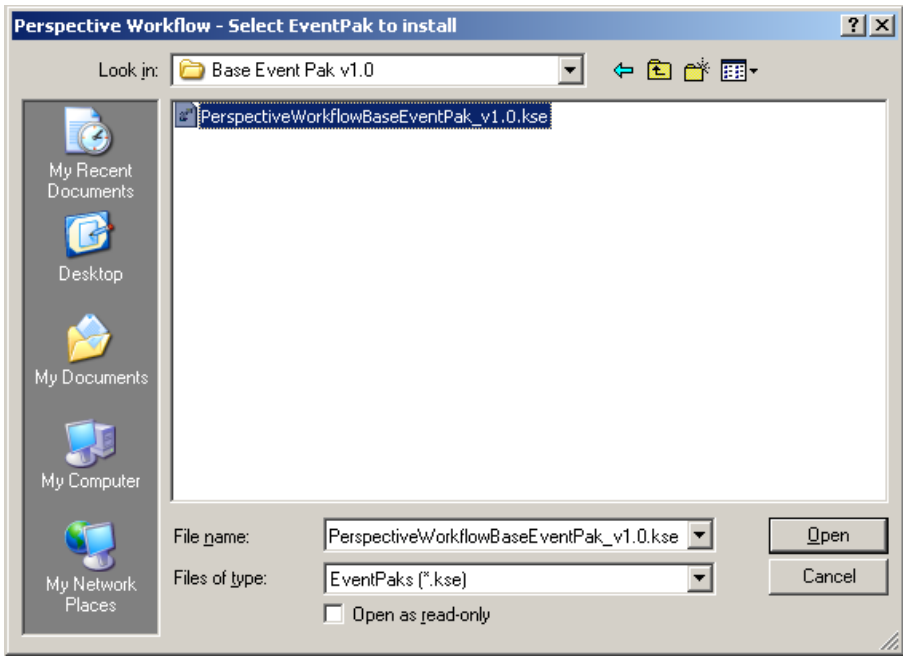


[Type a quote from the document or the summary of an interesting point. You can position the text box anywhere in the document. Use the Drawing Tools tab to change the formatting of the pull quote text box.]

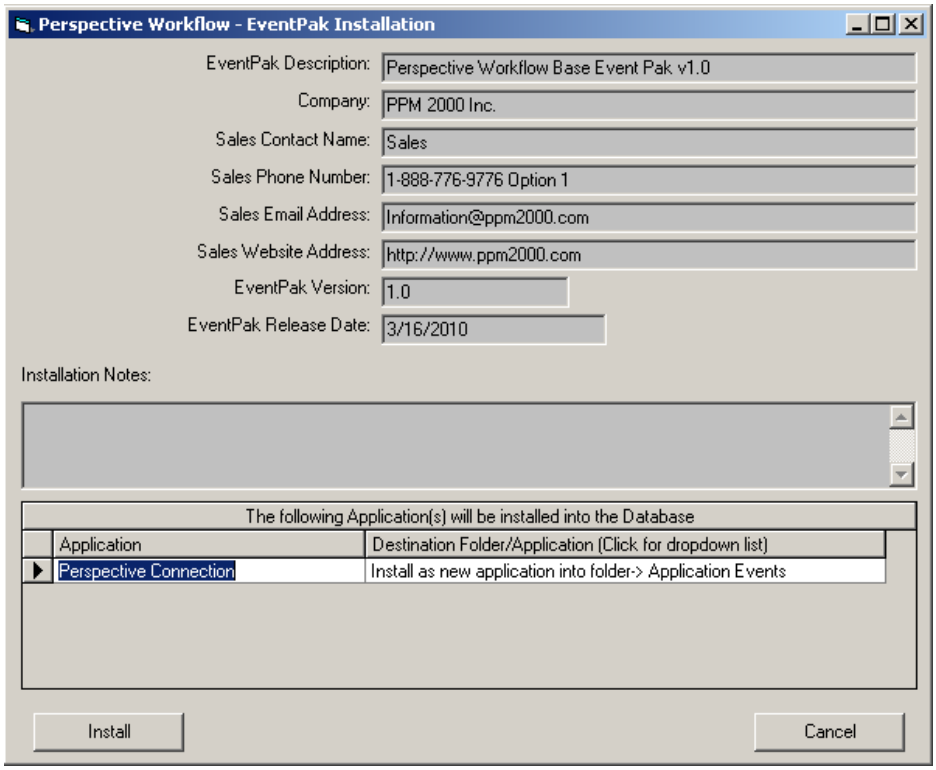
2. Under the **File** menu, select **Event Pak** then click **Install**.



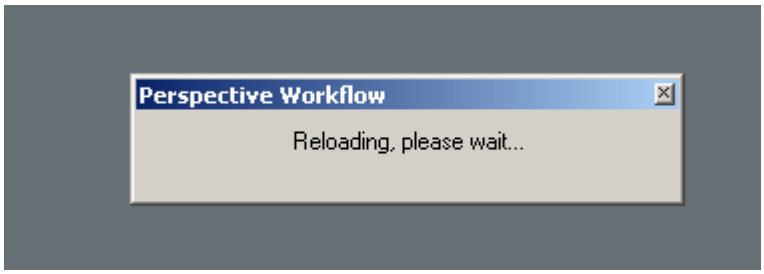
3. Browse to the location of the **PerspectiveWorkflowEventPak_v2.0.kse** file (included in the **Event Pak** folder); then, click **Open**.



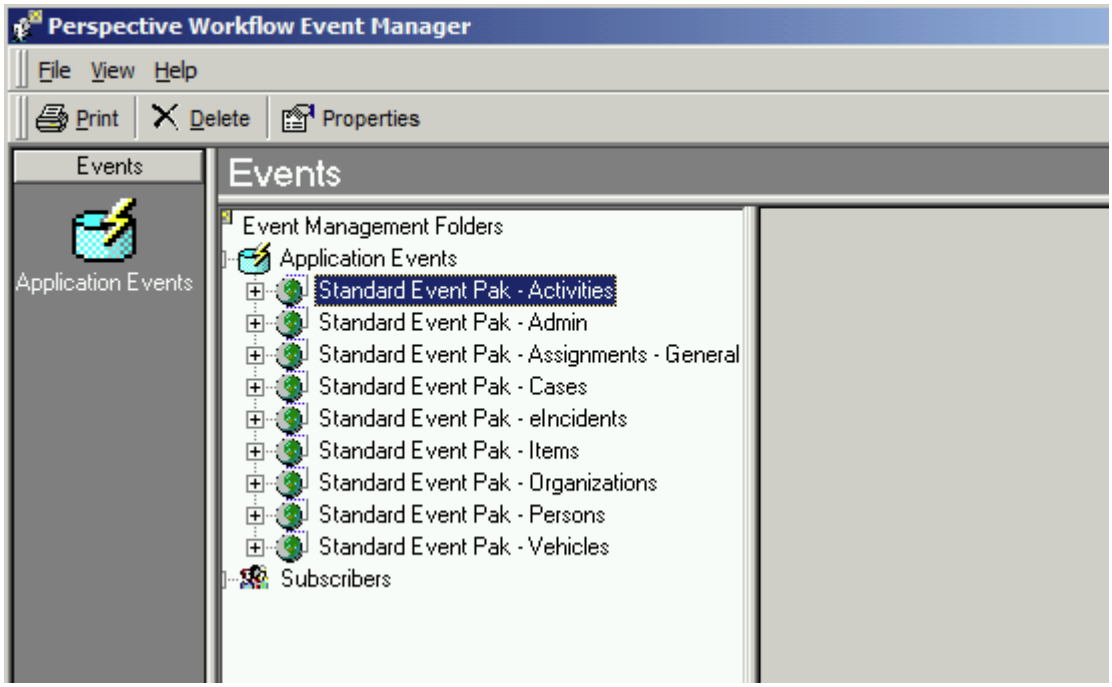
4. Click **Install**.



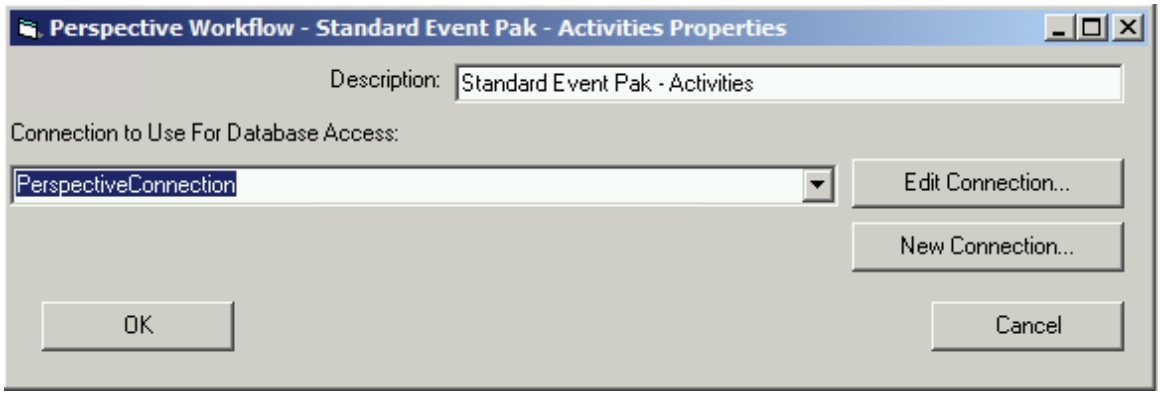
5. When the **Finished** message appears at the bottom of the window, click **Close**.



6. Select the **Perspective Connection** event pak under the **Standard Event Pak** node; then, click the **Properties** button.

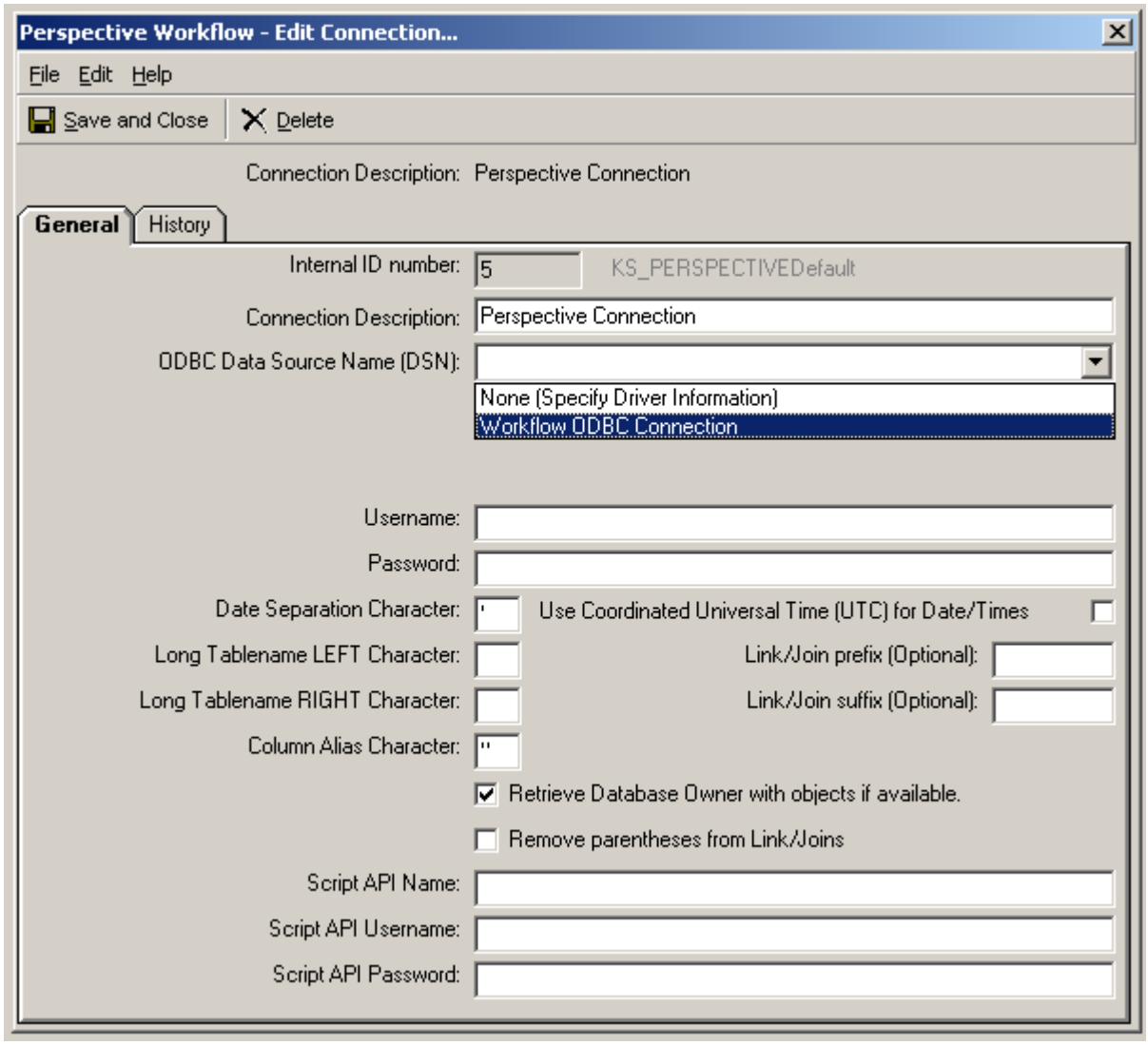


7. With **Perspective Connection** selected in the **Connection to Use For Database Access** field, click the **Edit Connection** button.


Perspective Workflow - Standard Event Pak - Activities Properties
Description:
Standard Event Pak - Activities
Connection to Use For Database Access:
PerspectiveConnection
Edit Connection...
New Connection...
OK
Cancel

8. In the **ODBC Data Source Name (DSN)** field, select the ODBC connection that you created in the *ODBC Connection Setup* phase of this installation process; click **Save and Close**; and then click **OK**.

   *Note: If SQL authentication was used for the ODBC connection, you must also enter your SQL credentials in the **Username** and **Password** fields.*



Subscriber Configuration

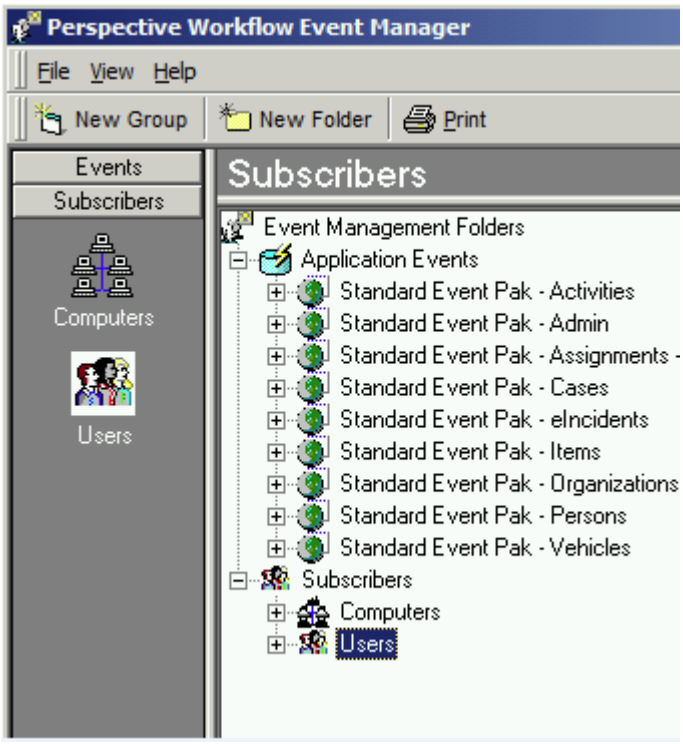
In Perspective Workflow, individuals who receive email notifications when events are triggered are known as "subscribers." Each event must have one or more subscribers associated with it, but before you can choose subscribers for each of your events, you must either manually create subscriber records within Perspective Workflow or link user records in your Perspective database to Perspective Workflow's subscriber list.

Note: Subscriber linking is dynamic; in other words, updates to your Perspective user records will automatically be reflected in your Perspective Workflow subscriber list.

For more information on subscriber configuration, please refer to the *Subscriber Maintenance* section of the *Perspective Workflow User's Guide*.

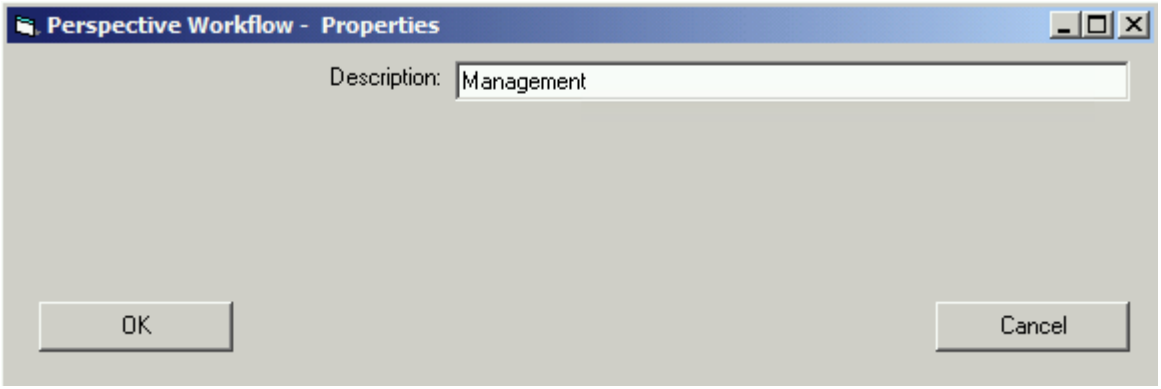
Manually Creating a Subscriber

1. In Perspective Workflow Event Manager, expand the **Subscribers** node and select **Users**.

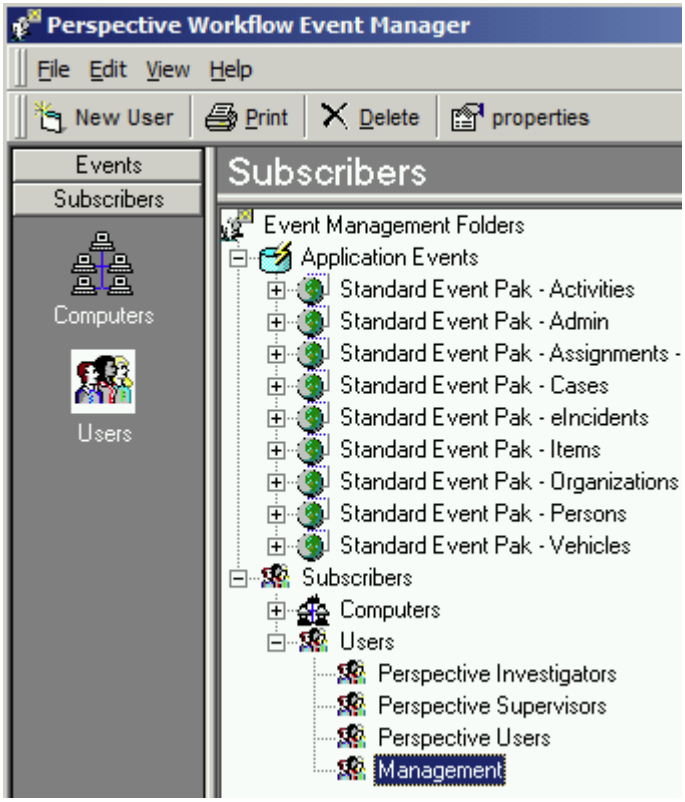


2. Click the **New Group** button in the top-left corner of the window.

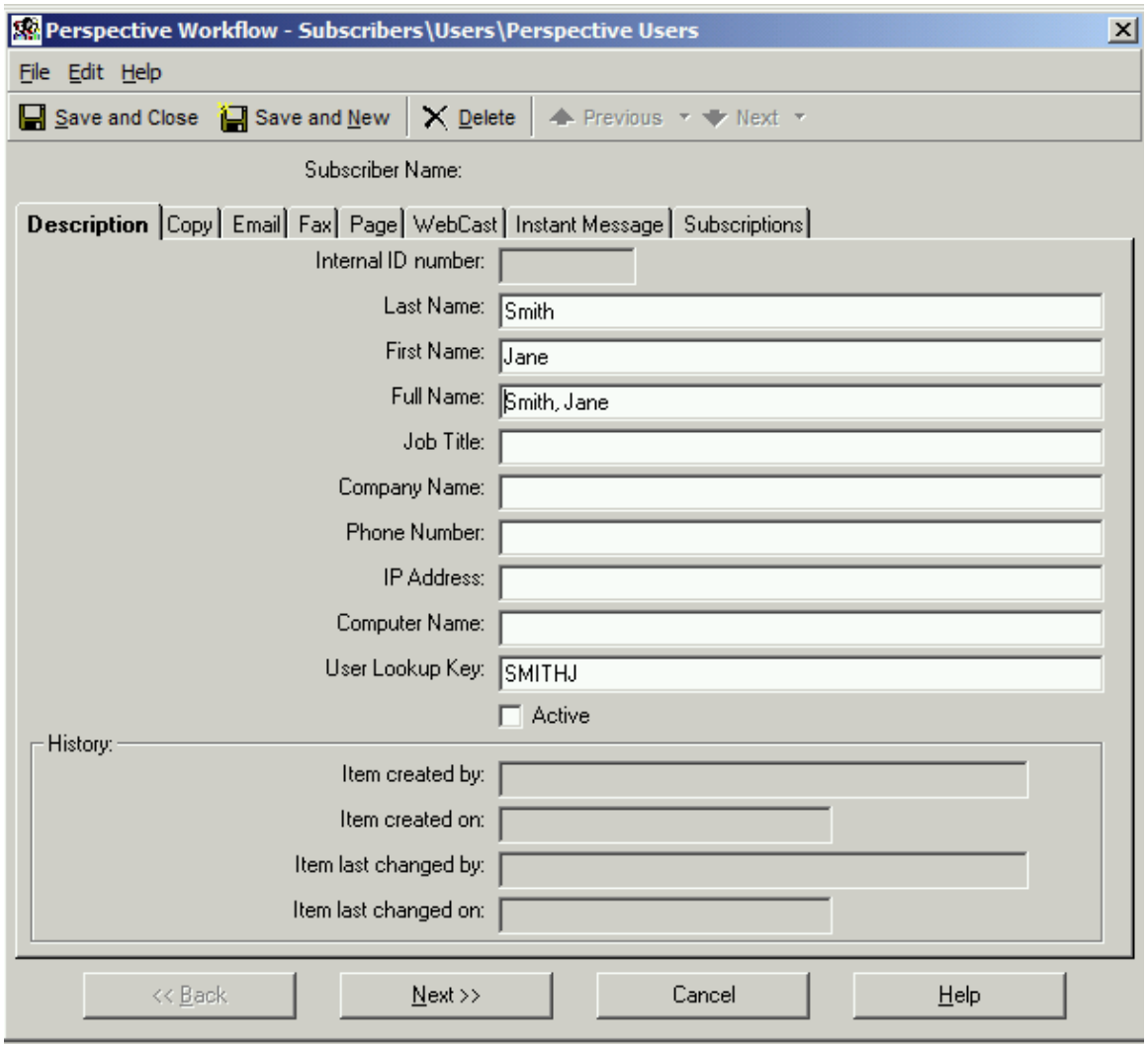
3. Enter a **Description** for your group; then click **OK**.



4. Select your new group under the **Users** node, and click the **New User** button.

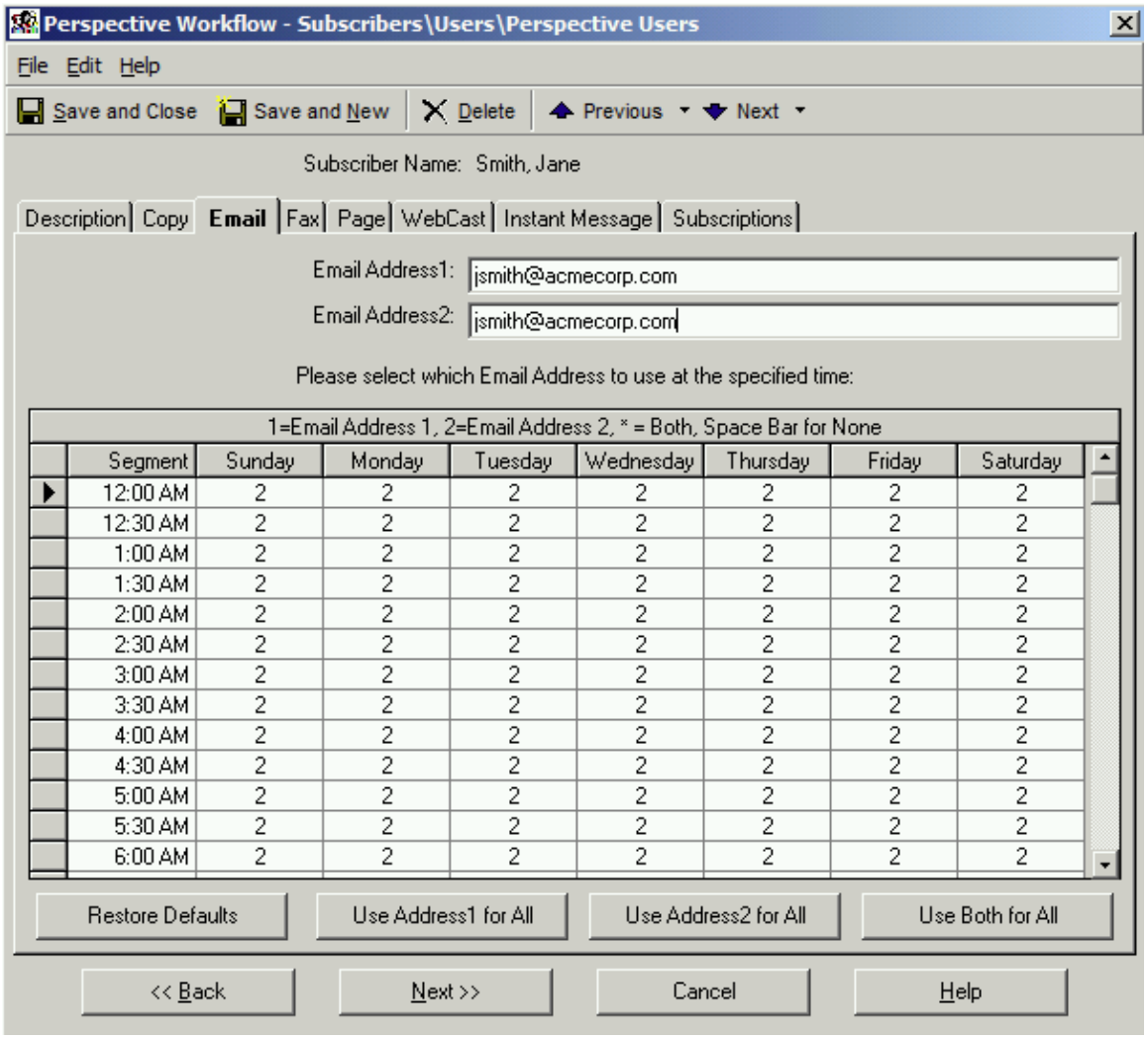


5. Complete the **Last Name** and **First Name** fields, and check the **Active** box. (The **Full Name** field will automatically populate.)

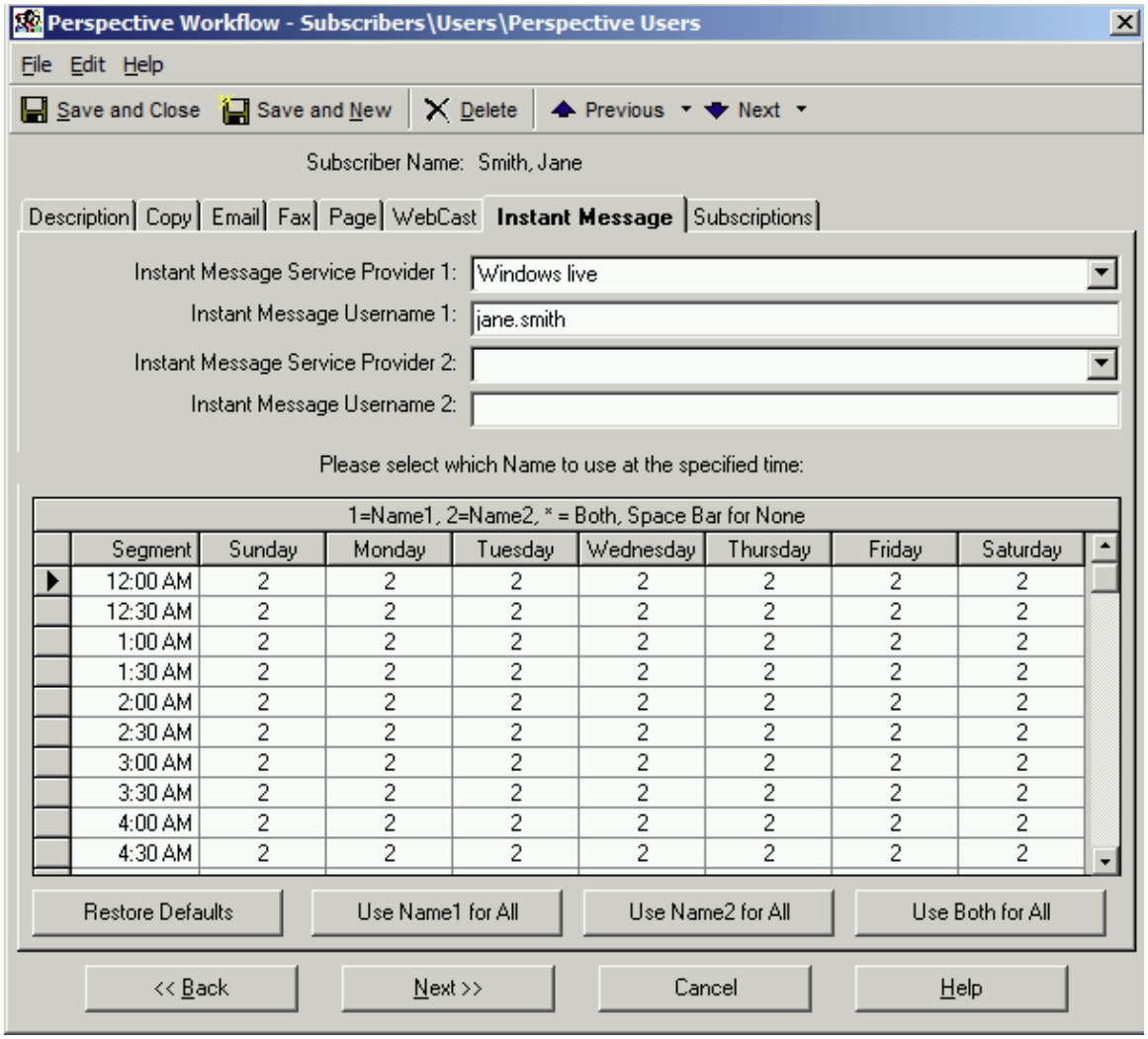


6. Select the **Email** tab, specify the subscriber's primary email address in **Email Address 1** and, if applicable, enter their secondary email address in **Email Address 2**.

7. Indicate which email address (**1** or **2**) should be used on various days of the week and times of day to notify the subscriber of an event's occurrence. To indicate that both addresses should be used in a given time slot, enter an asterisk (*****), or you may leave the slot blank to indicate that neither email address should be used. Alternatively, you can click the **Use Address 1 for All**, **Use Address 2 for All**, or **Use Both for All** buttons to quickly apply settings to all time slots.



8. **IM Setup for Subscriber**: Select the Instant Message tab, select the Instant Message Service Provider, and finally, select the IM Username of the subscriber (the person who will be receiving the IM notifications).

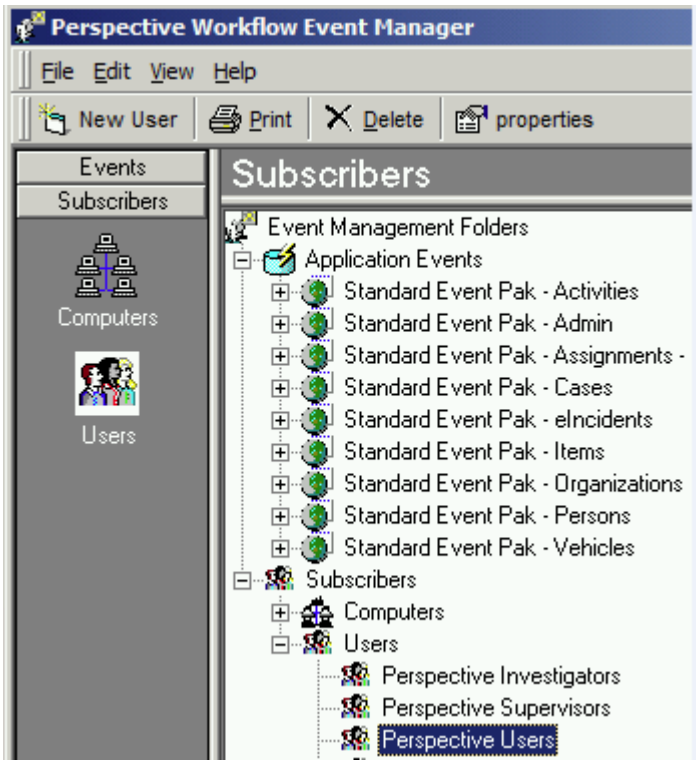


9. Click **Save and Close**.

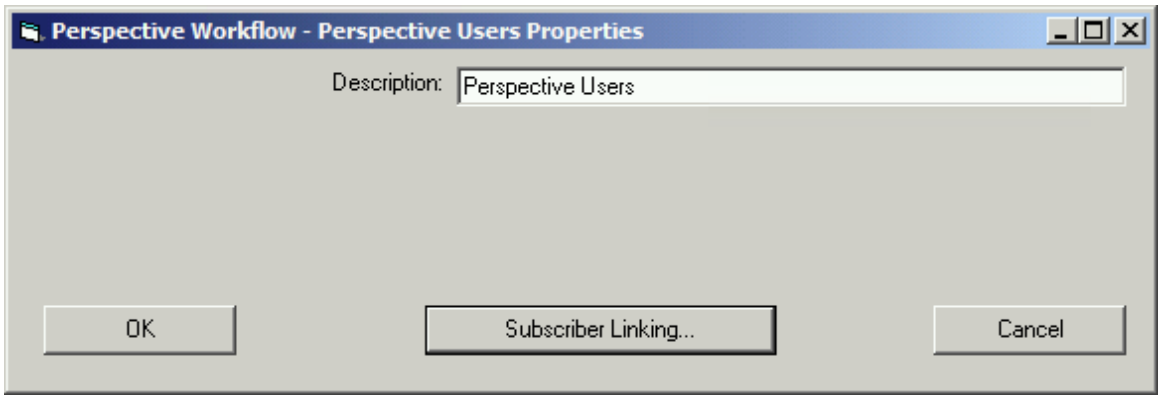
10. Continue to apply these steps to manually create additional subscribers as needed.

Linking a Subscriber Group

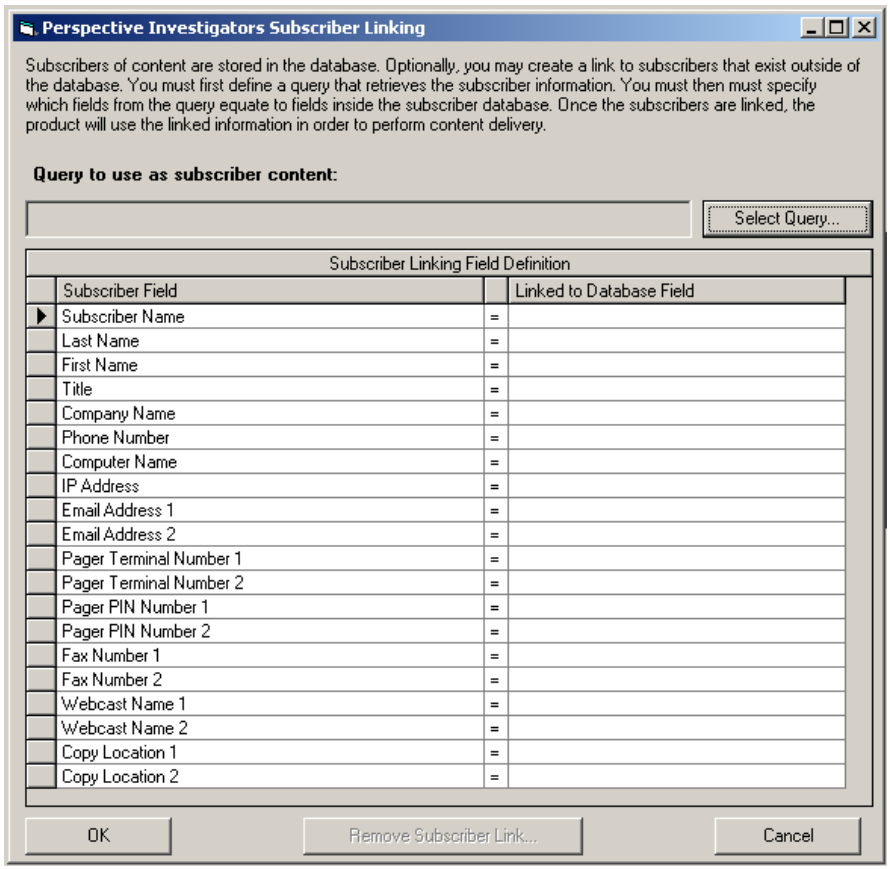
1. In the Perspective Workflow Event Manager, select one of the default groups under **Subscribers > Users** (i.e., **Perspective Users**, **Perspective Supervisors** or **Perspective Users**). Then, click the **Properties** button at the top of the window.



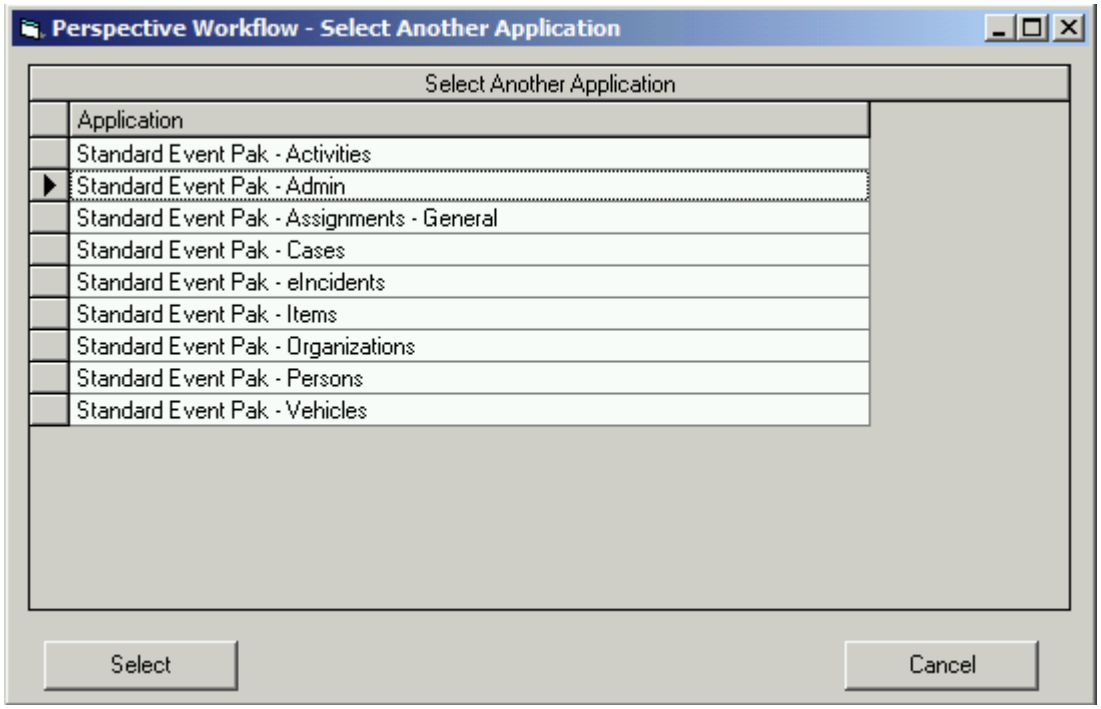
2. Click the **Subscriber Linking** button.



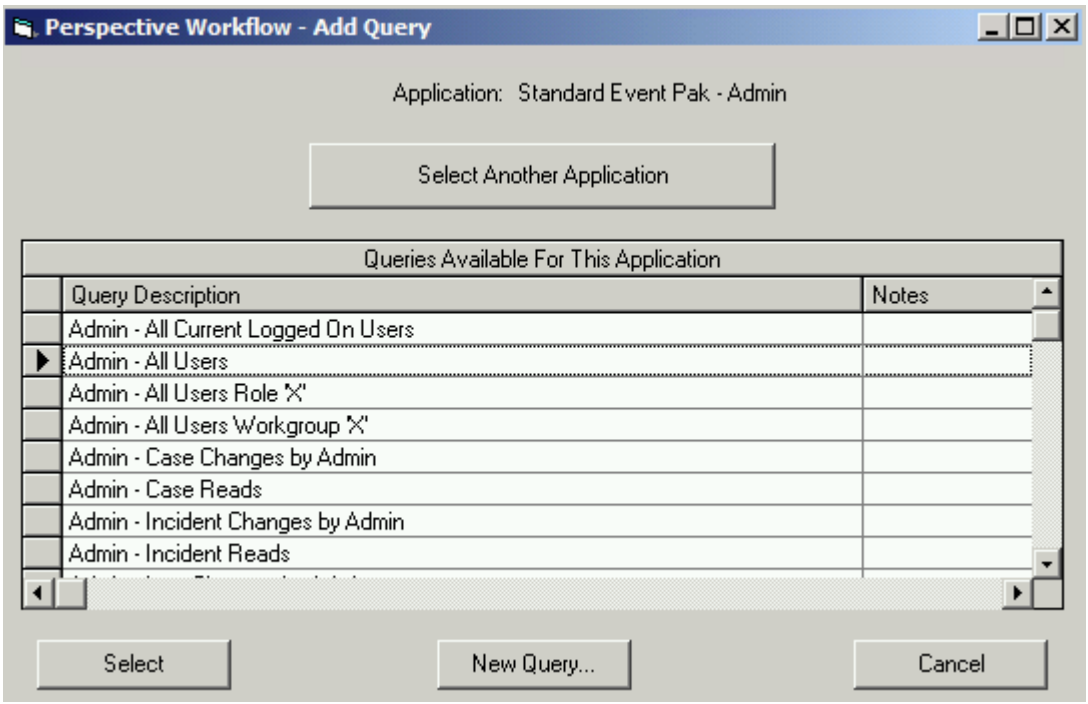
3. Click the **Select Query** button.



4. Select the **Standard Event Pak - Admin** application from the list by clicking on the arrow to the left of the name; then click the **Select** button.

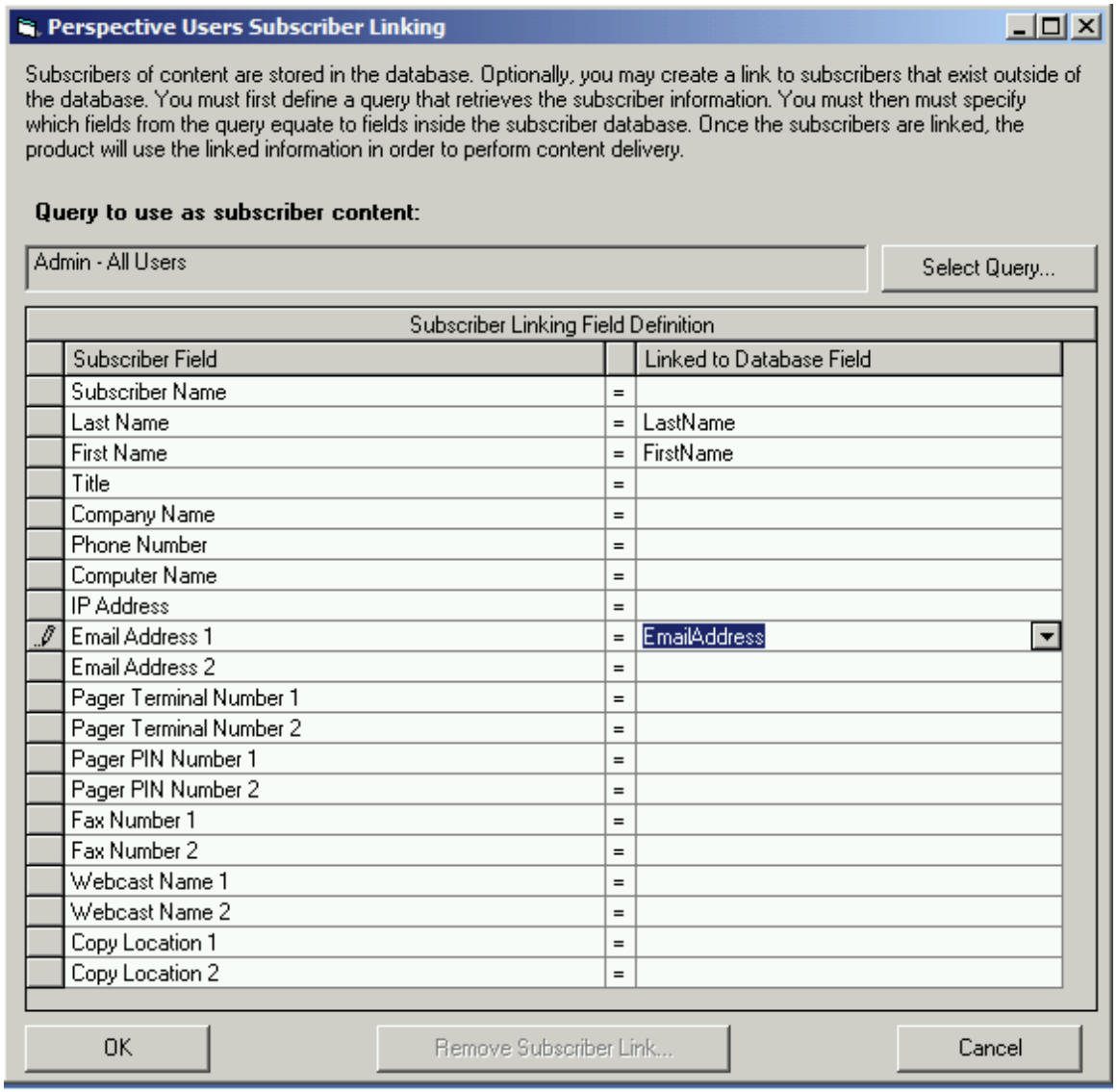


5. Select the user query that corresponds to the default subscriber group you selected in Step 1 (i.e., **Admin – All Users** group; **User List – Investigators for the Perspective Investigators** group; or **User List – Supervisors for the Perspective Supervisors** group). Then, click the **Select** button.



6. In the **Linked to Database Field** column on the right, select only the values shown in the following screenshot and click **OK**; then, click **OK** again.

   *Note: This will link only to each subscriber's primary email address in Perspective (the email address that appears in the subscriber's **Person** record with the **Primary** box checked.)*



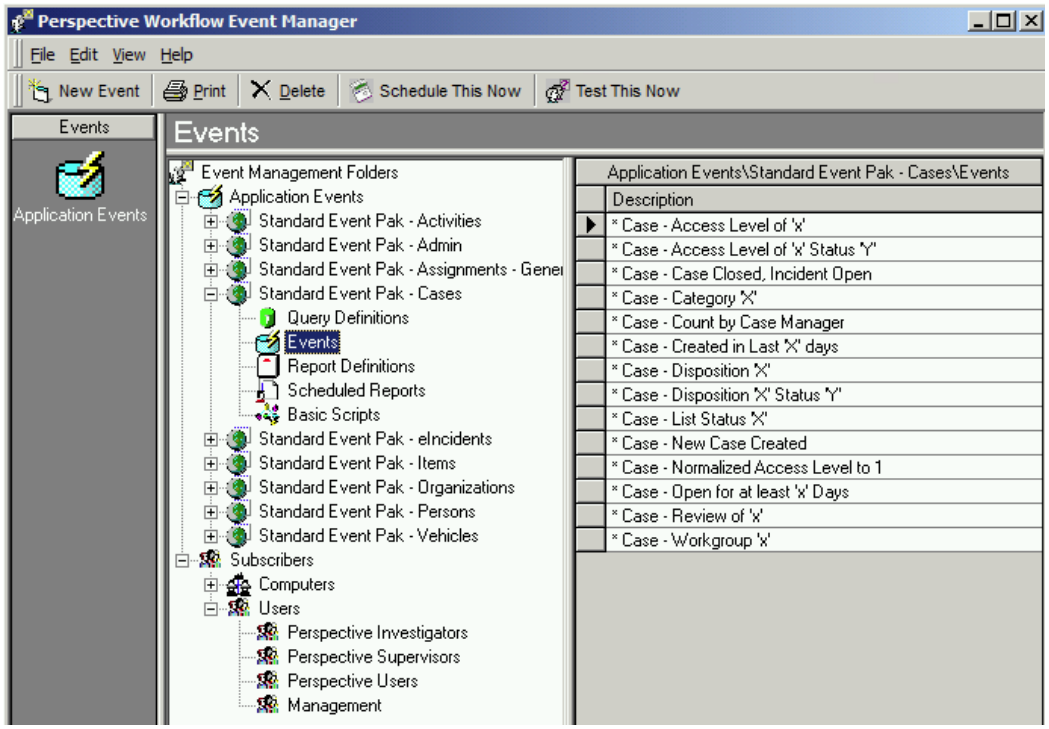
Event Configuration

Before using any of the events in your Perspective Workflow event pak, you must complete the following steps:

- Specify the filter values that each event's queries will use (if applicable).
- Run each event once using the Schedule This Now option.
- Set each event to "Active" status.
- Select the email account that each event's alert messages will be sent from.
- Ensure that each event has at least one subscriber with the Email box checked.
- Enter a schedule for each event.

For more information on configuring events, including designing events of your own, please refer to the *Event Designing* section of the *Perspective Workflow User's Guide*.

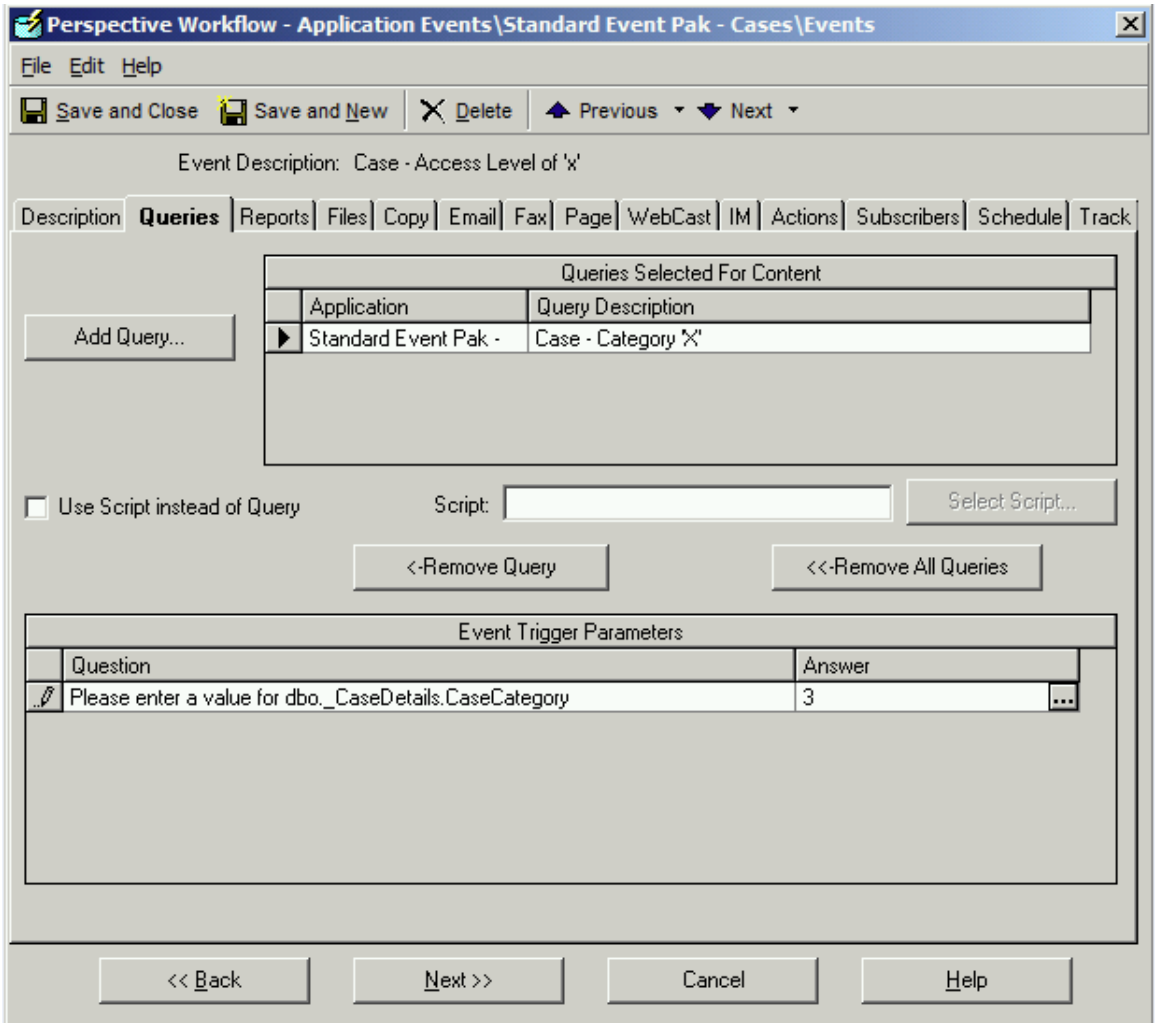
1. In the Perspective Workflow Event Manager, expand the **Standard Event Pak - Cases** node and select **Events**.



2. Double-click an event in the list on the right.

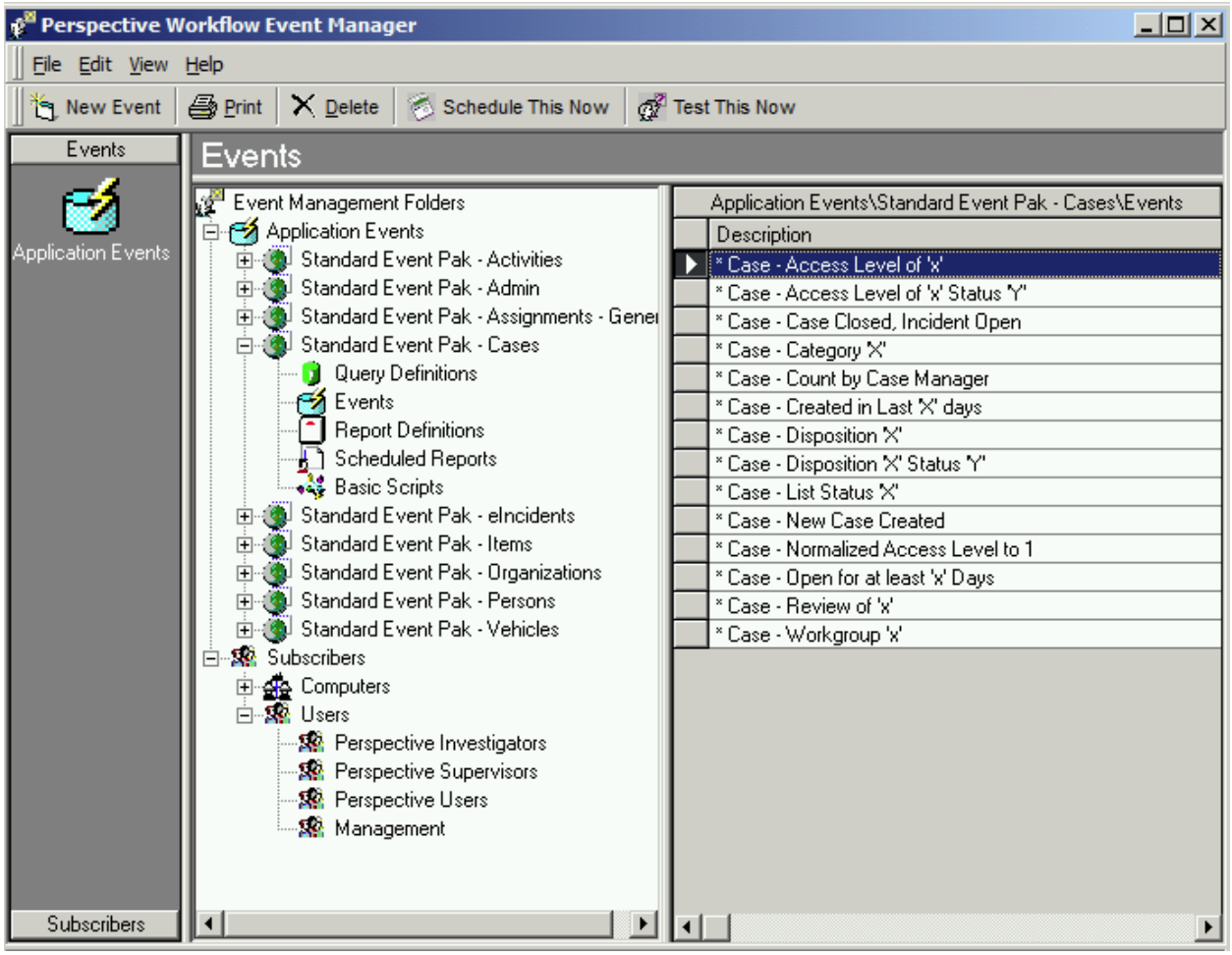
3. Select the **Queries** tab. If a question or prompt appears in the **Question** field at the bottom of the window, specify the appropriate filter value in the **Answer** field. You may type the value in the field, or click inside the field and select the value from a list of available options using the **Browse (…)** button that appears.

   *Note: Only values that have been saved in at least one record in your database will be available for selection using the **Browse (…)** button. If you wish to specify a filter value that is not available, you must type it in the **Answer** field.*



4. Click **Save and Close**.

5. Select the same event in the list on the right, and click the **Schedule This Now** button.



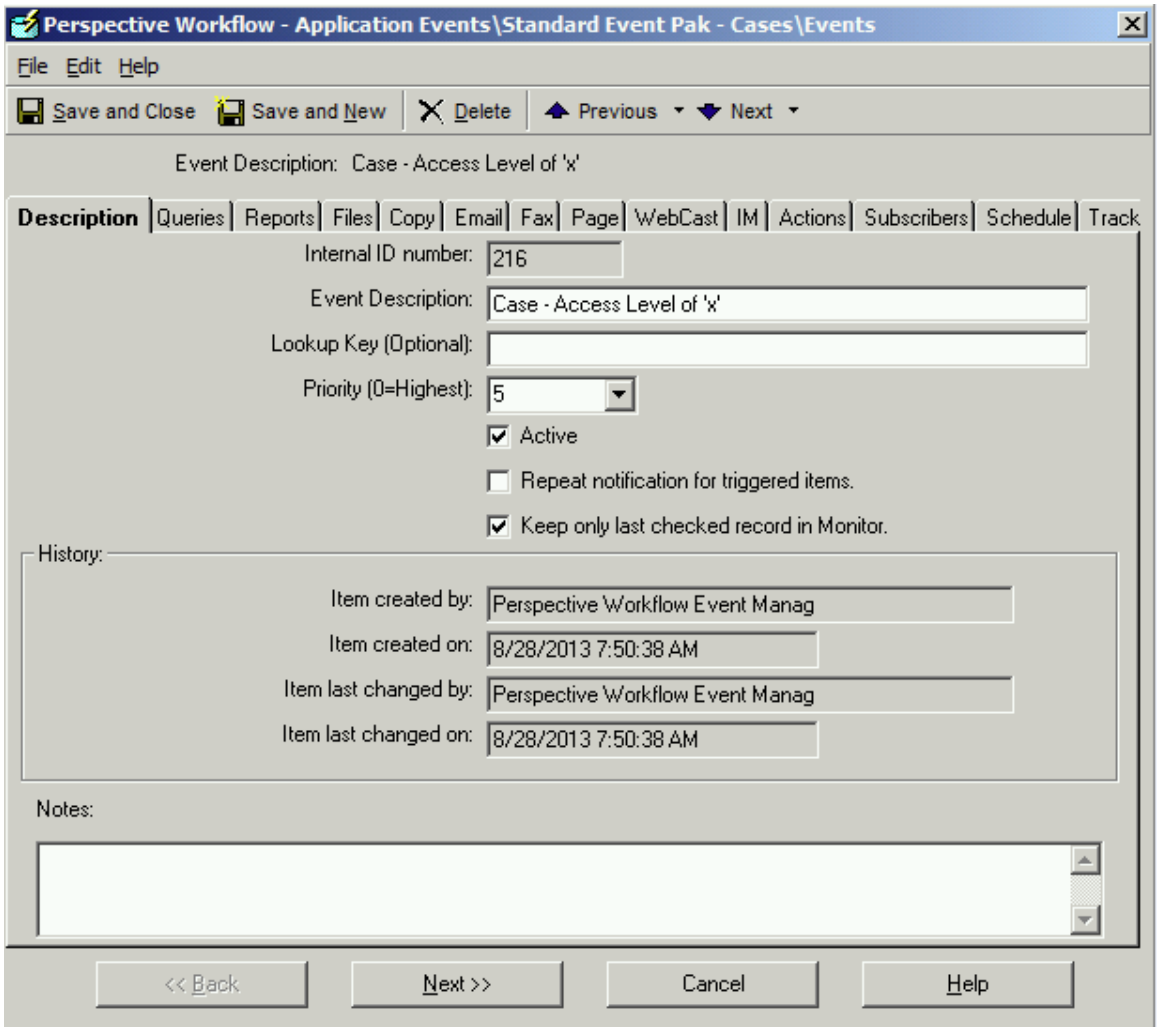
6. Click **Yes** to confirm you wish to schedule this event to run immediately, and then click **OK**.

   *Note: The event will now run, and any existing records in your database meeting the event's conditions will be listed under the event's **Tracking** tab. By running the event now, before completing the event's configuration, you will avoid flooding subscribers' inboxes with numerous emails triggered by existing data. After the event's configuration is complete, email notifications will only be sent for new data meeting the event's conditions.*

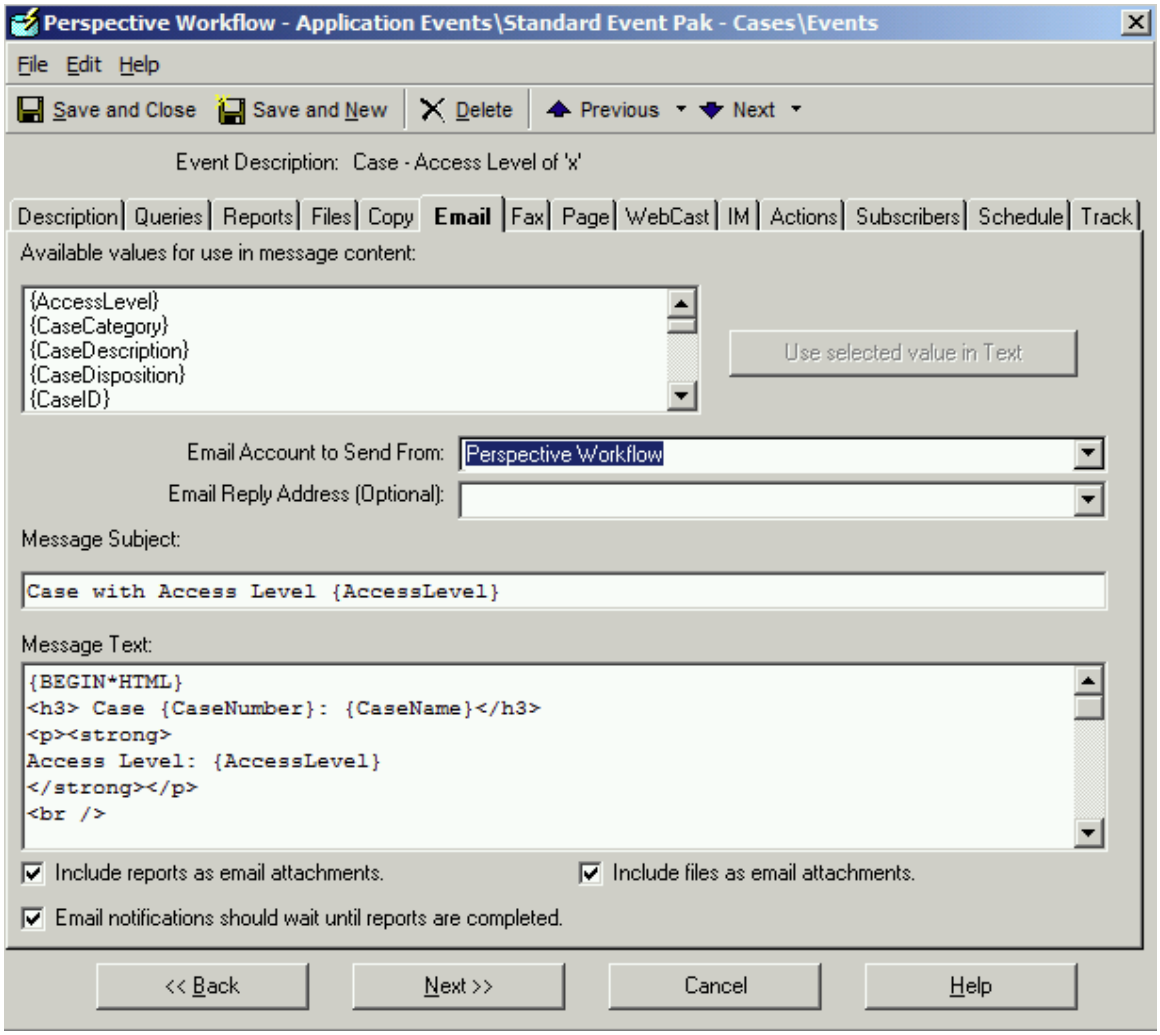
7. Double-click the same event in the list to open it once again.

8. If applicable for the event, edit the **Event Description** to include the filter value(s) you specified in Step 3 (e.g., Case with Access Level of '3' rather than Case with Access Level of 'x').

9. Check the **Active** box.



10. Select the **Email** tab, and choose an option for the **Email Account to Send From** field. (This indicates the account that all email alert messages for this event will be sent from.)



11. If applicable for the event, edit the **Message Subject** and/or **Message Text** to include the filter value(s) you specified in step 3.

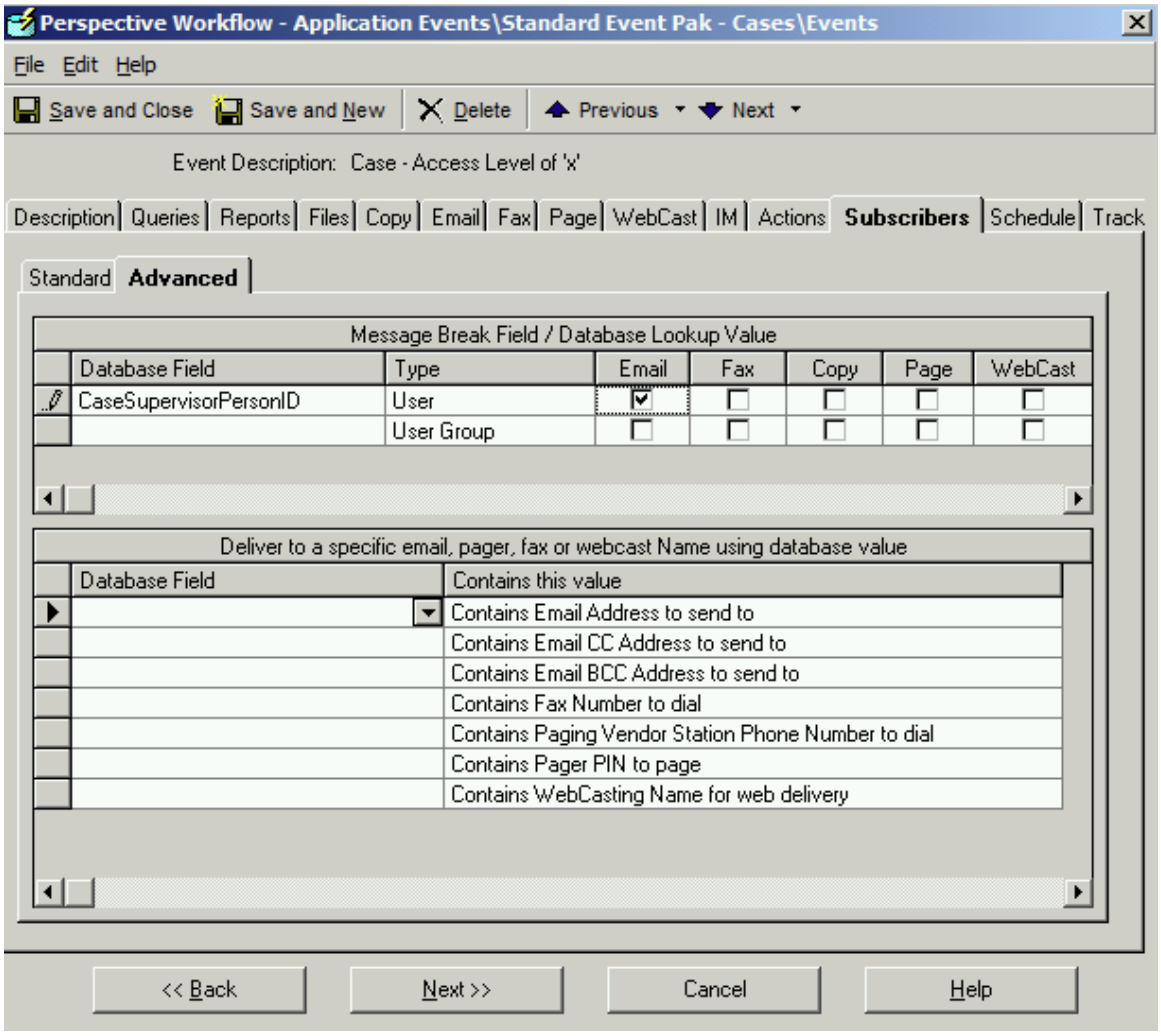
    *Note: Do not edit text enclosed in curly brackets, such as **{AccessLevel}**. This text will be automatically replaced by data drawn from the specific record(s) triggering the event.*

12. **Configure IM**: Select the IM tab, type the IM message to send to subscribers.

13. Select the **Subscribers** tab, and then select the **Advanced** sub-tab.

14. By default, most events will already have a particular type of Perspective user selected in the **Database Field** column (e.g., **CaseSupervisorPersonID**, **InvestigatorPersonID**, etc.). If so, ensure the **Email** box is checked.

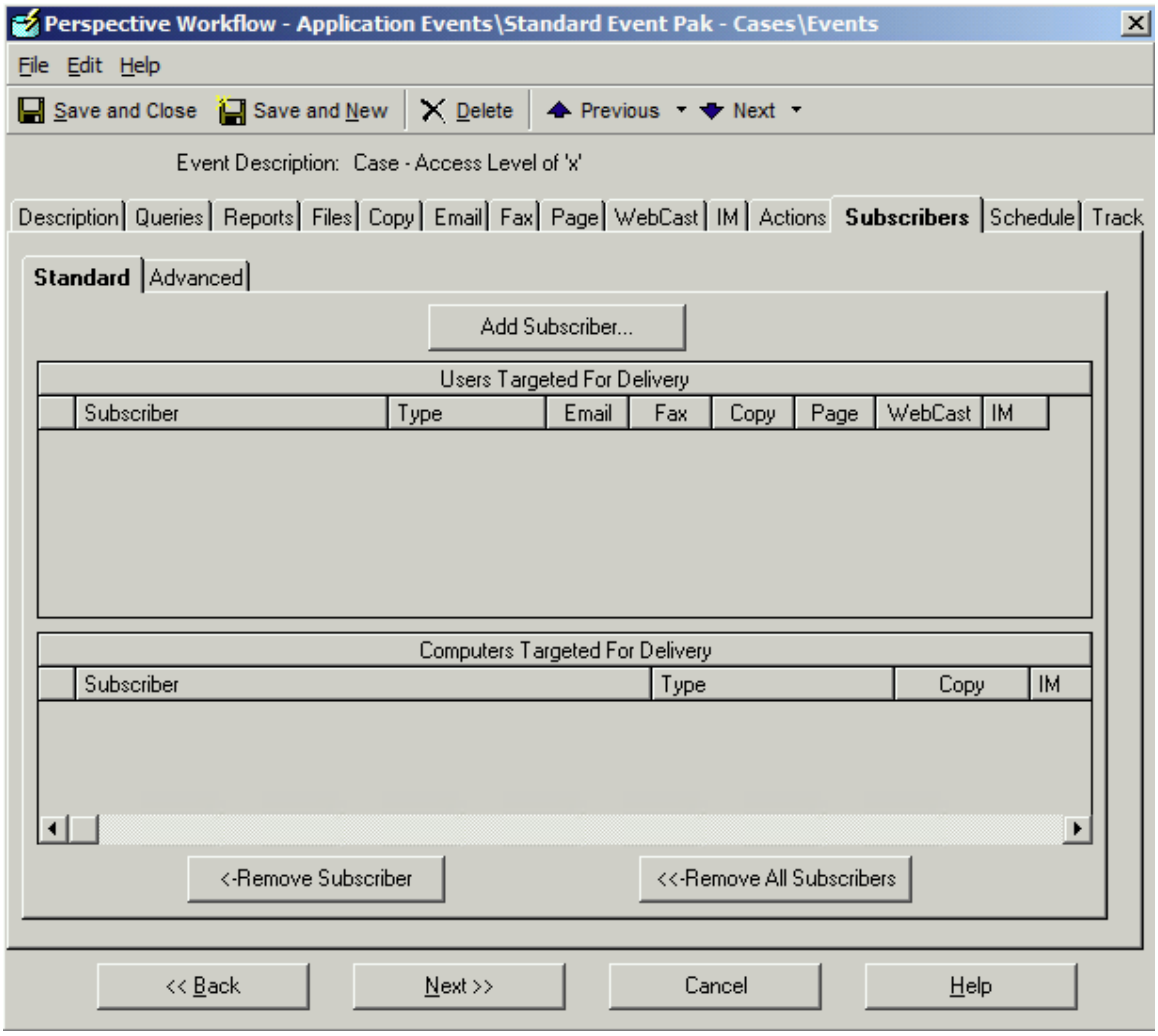
    *Note: Subscribers selected under the **Advanced** sub-tab are specific to the records triggering the event. For example, in the screenshot below, the **CaseSupervisorPersonID** subscriber will be the specific case supervisor associated with the case record that triggers the event to run. In other words, each time a different case record triggers the event, a different case supervisor may be notified.*



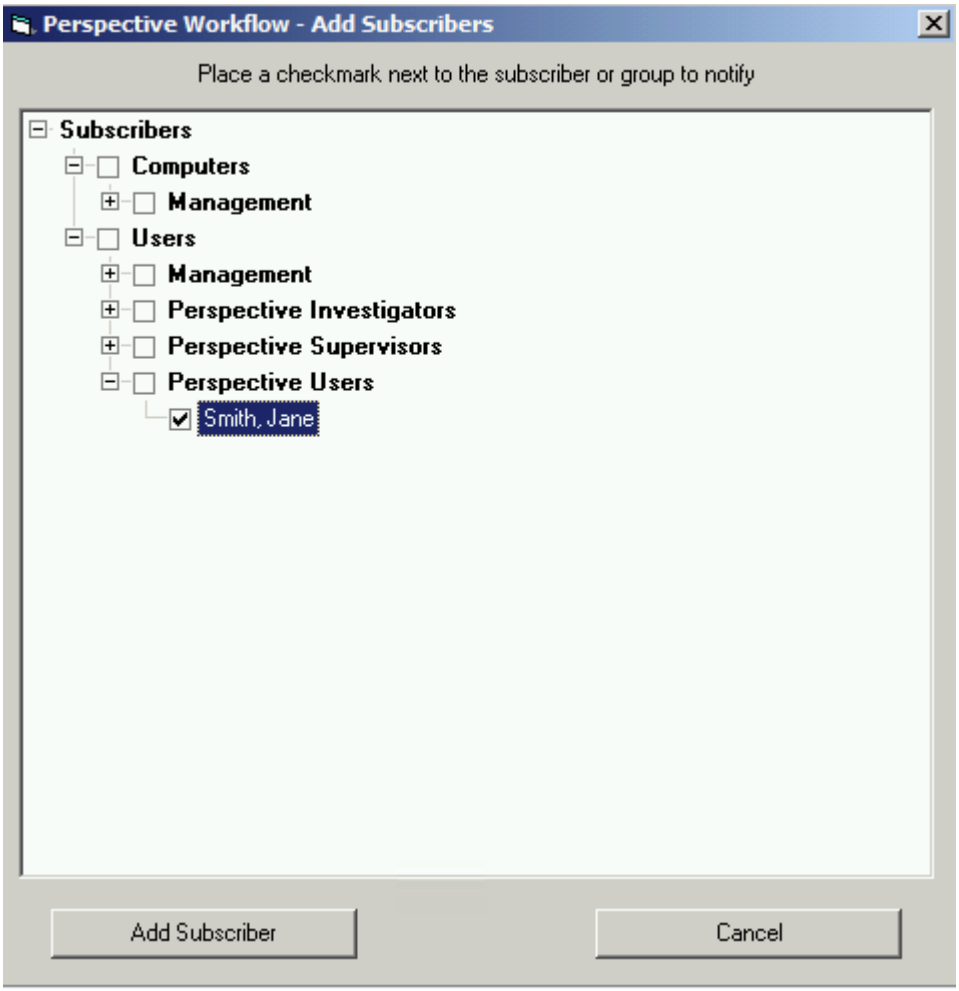
15. To select additional users or groups to subscribe to this event, select the **Standard** sub-tab.

    Note: If there are no subscribers selected under the Advanced sub-tab, you must select at least one subscriber under the Standard sub-tab.

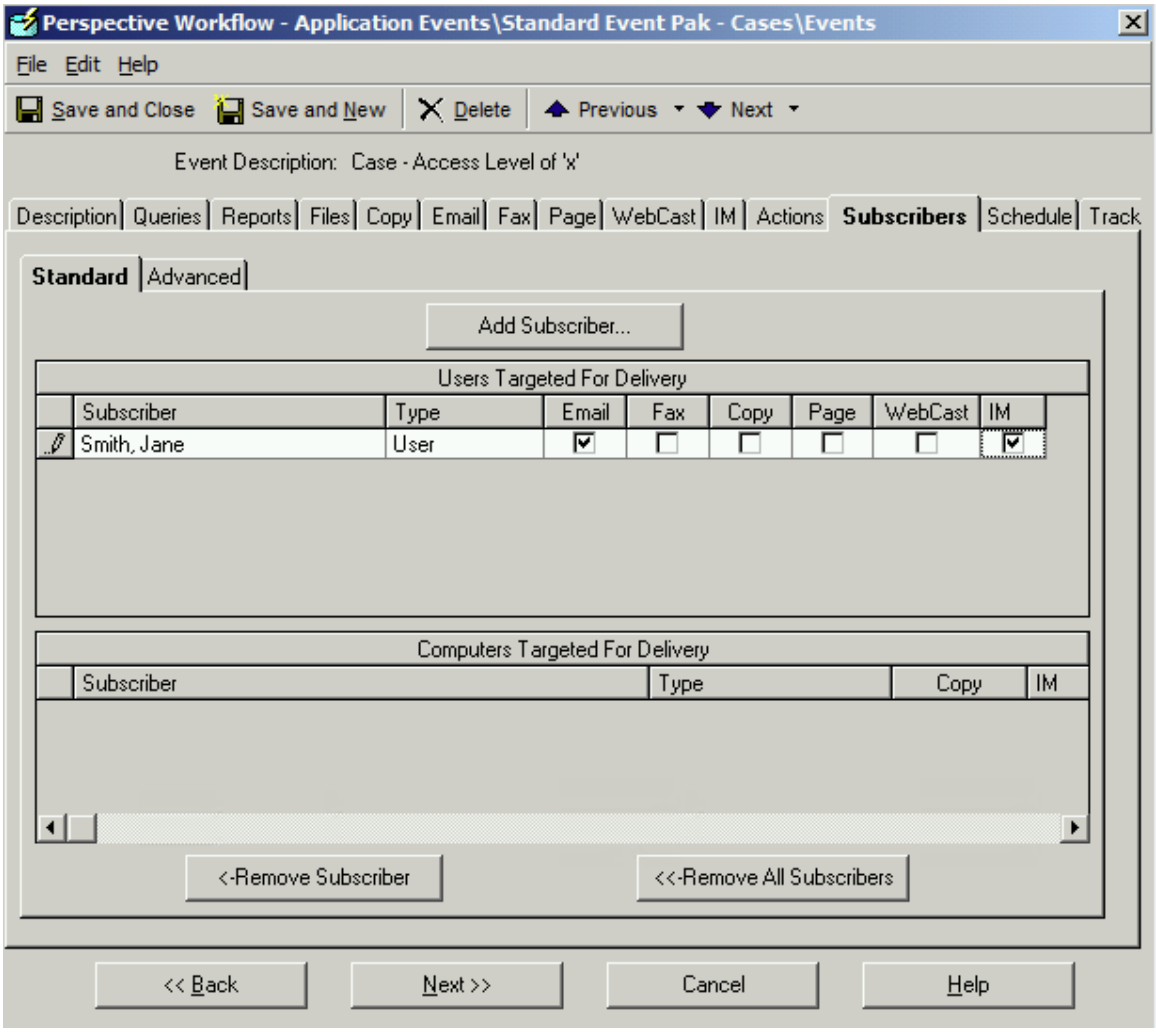
    i. Click **Add Subscriber**.



ii. Check the boxes for all individual subscribers and/or groups you want to receive email alert messages for the event; then, click **Add Subscriber**.

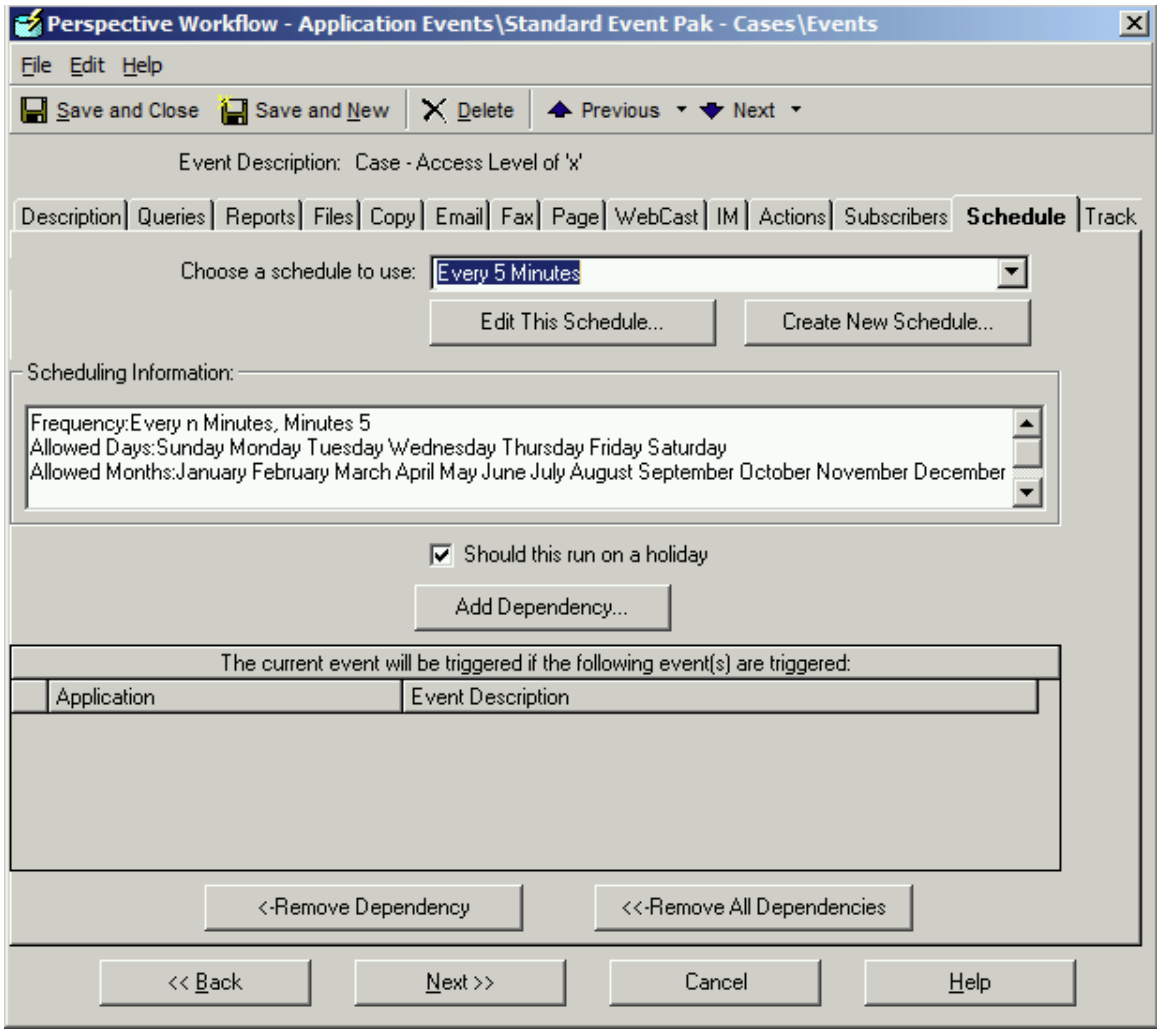


iii. Ensure the **Email** box is checked beside each subscriber's name.



16. Select the **Schedule** tab.

    a. Select an option for the **Choose a schedule to use** field (e.g., Every Hour, Every Monday at 9:00 AM, etc.).



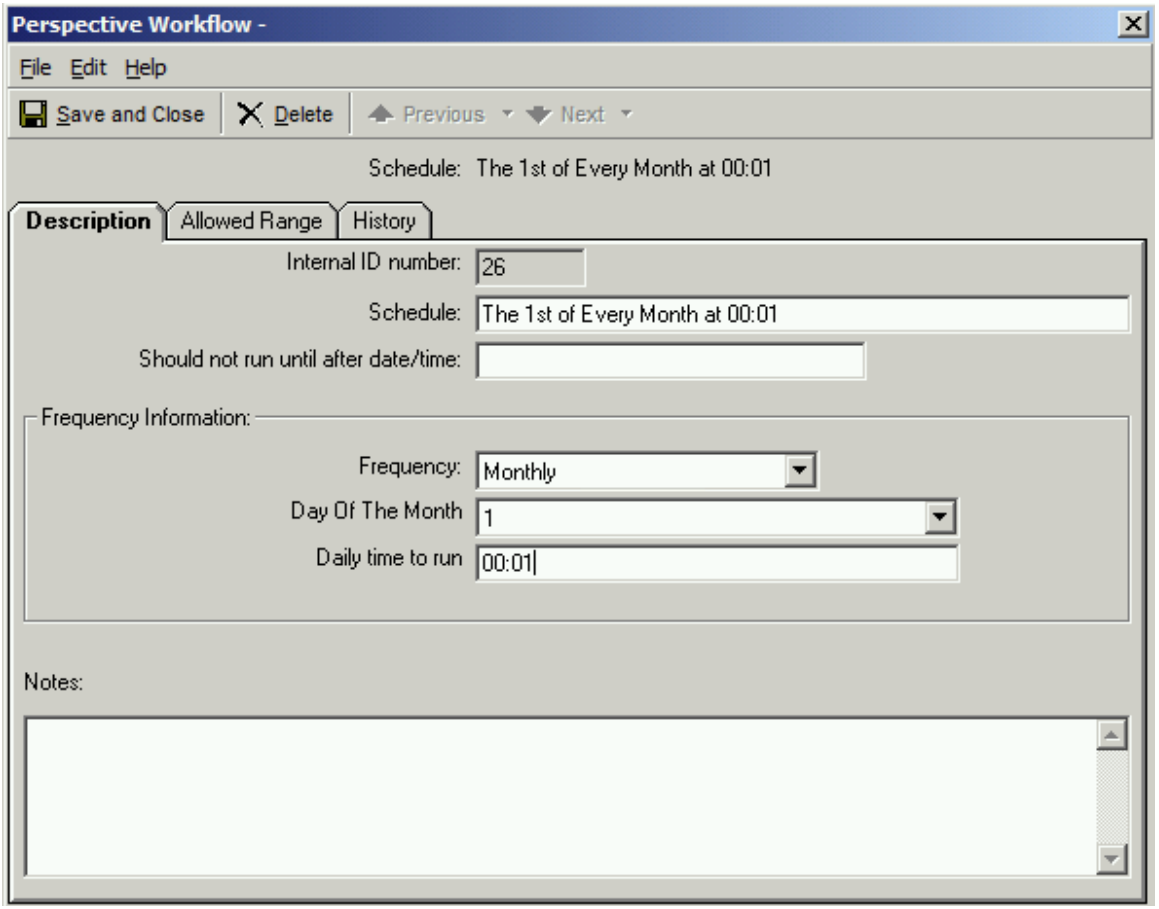
    OR

    b. Click the **Create New Schedule** button.

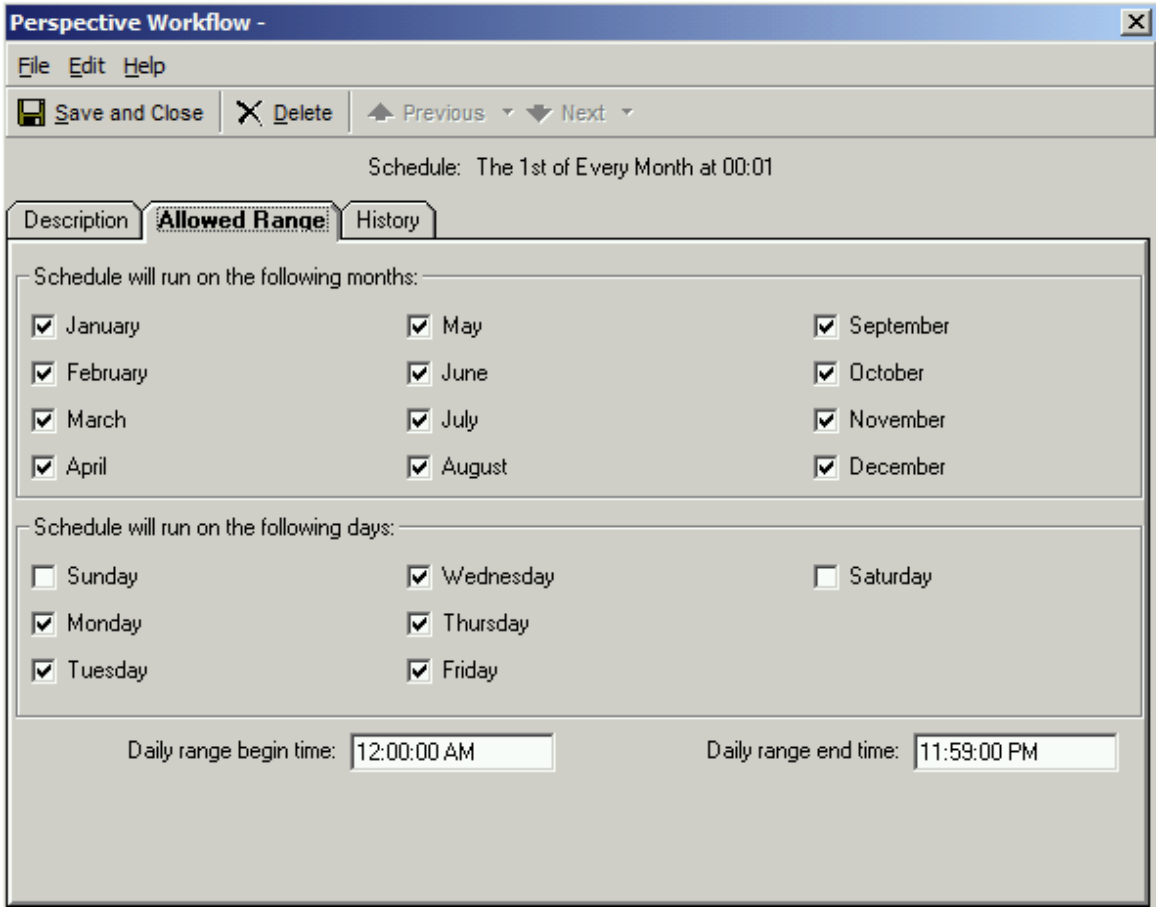
        i. In the **Schedule** field, enter a description for your new schedule.

        ii. In the **Should not run until after date/time** field, enter a future date when events using this schedule will begin to run, or leave the field blank if you want the schedule to be activated immediately.

iii. In the **Frequency** field, choose an option for the schedule's rate of recurrence (e.g., Every n Minutes, Daily, Weekly, etc.); then, in the new field that appears below, specify additional details for the frequency, such as the time of day for the event to run or the day of the week.

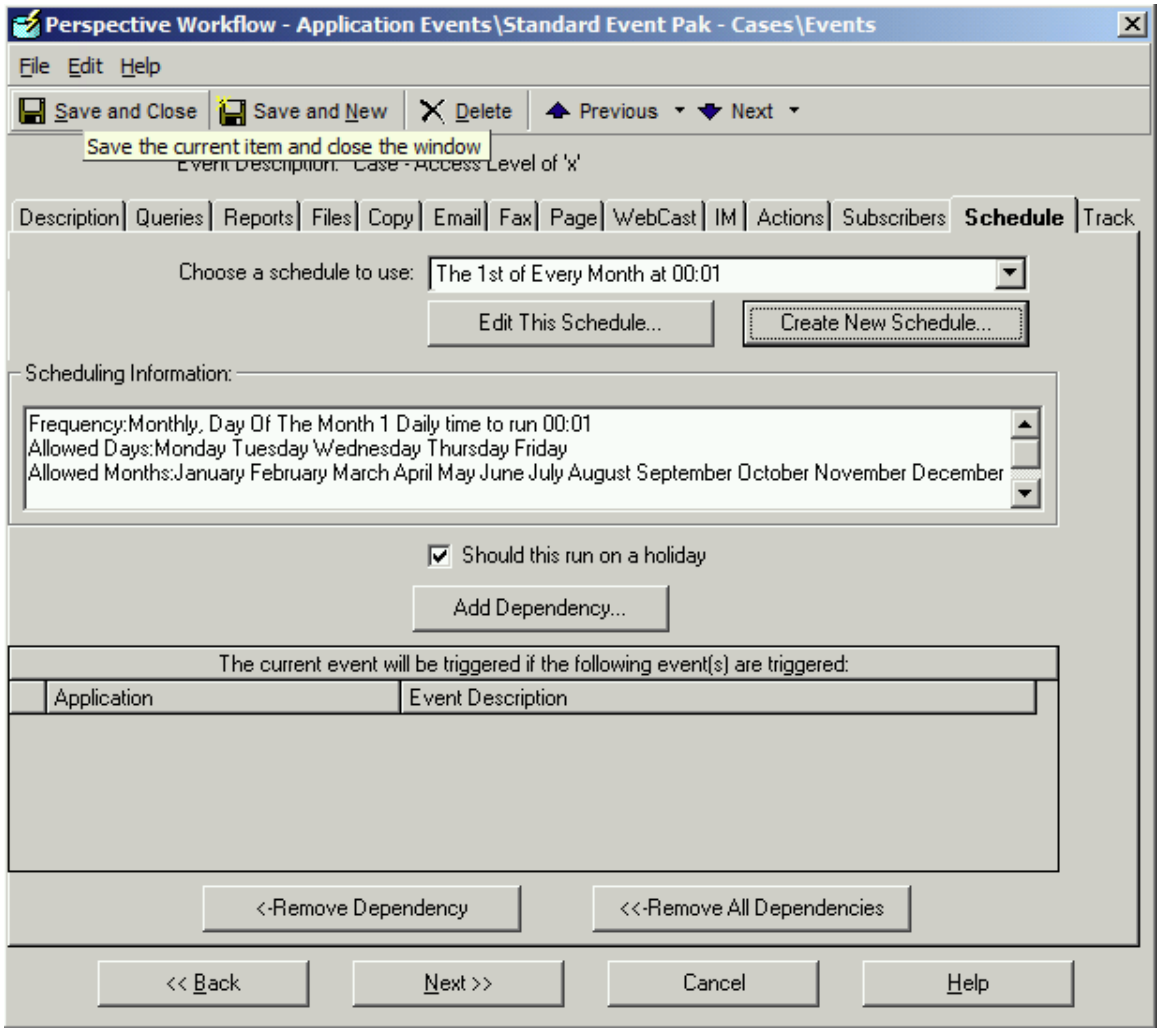


iv. Under the **Allowed Range** tab, specify the months of the year, days of the week and hours of the day that the event is eligible to run. (Times are inclusive.)



v. Click **Save and Close**.

17. Click **Save and Close**. The event is now activated and will run according to the specified schedule alerting the subscribers indicated.



18. Continue to apply these steps to all events you would like to activate.

Contact Information

Technical Support

Toll Free: 1-877-776-2995
Phone: (780) 448-0616
Email: support@ppm2000.com

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Toll Free: 1-888-PPM-9PPM (1-888-776-9776)
Phone: (780) 448-0616
Fax: (780) 448-0618
Email: information@ppm2000.com
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