

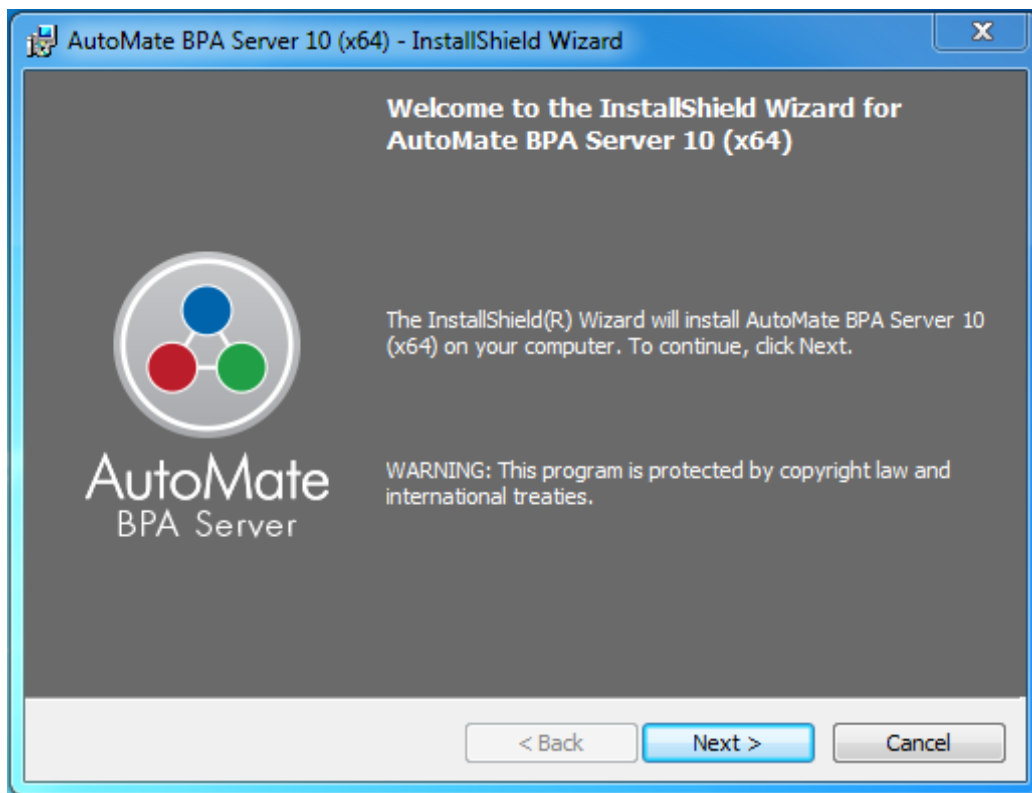
AutoMate BPA Server 10 Installation Guide

AutoMate BPA Server follows the client/server model of computing where one or more servers are hosts that share their resources with multiple clients. Since data storage is centralized, updates to that data are far easier to administer. This architecture also supplies greater ease of maintenance and enables the roles and responsibilities of a computing system to be distributed among several independent computers. AutoMate BPA Server components can all be installed on the same machine or installed independently on separate machines as long as they are capable of communicating with each other via TCP/IP. This article supplies step by step instructions in regards to the installation process.

NOTE: For convenience, default values are entered for most parameters allowing a seamless installation process by simply clicking Next on each window.

1. Welcome

When starting the installation of AutoMate BPA Server, the first window that appears is the Welcome window (shown below).



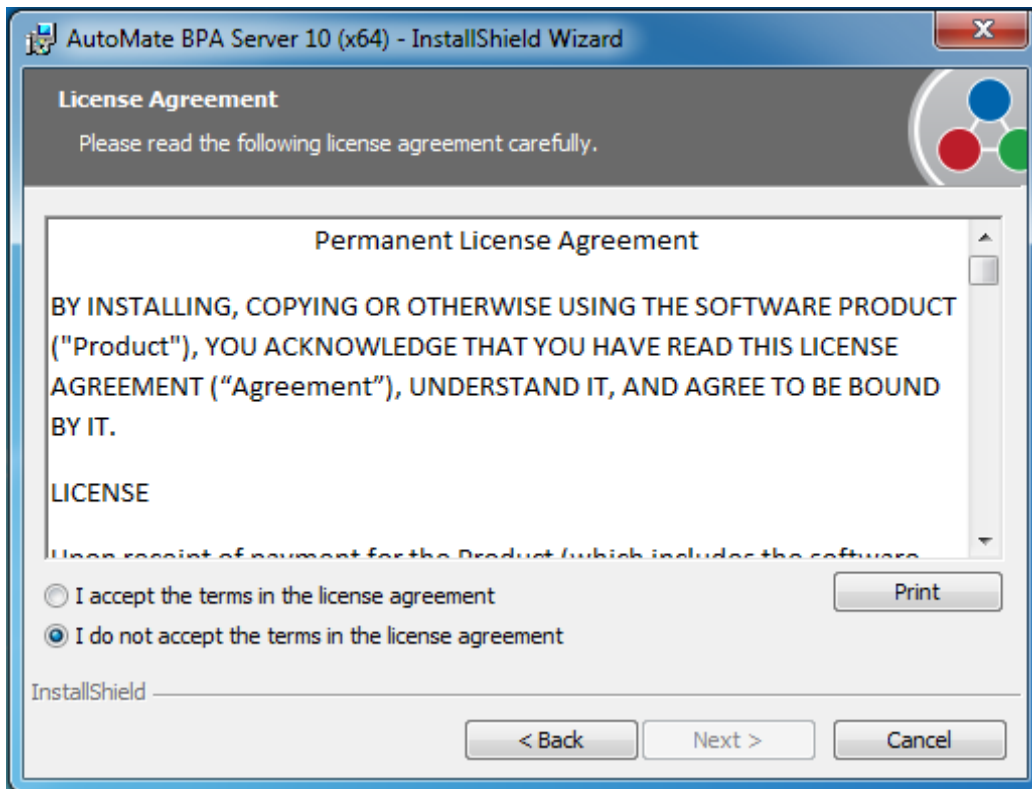
At this point, make sure to close all Windows programs and applications before continuing with the installation. This and all installation windows going forward will contain a **Back** button to revert back to

the previous window, **Next** button to advance to the next window or **Cancel** button to cancel the installation process altogether.

Click **Next** to continue.

2. License Agreement

The License Agreement window (illustrated below) appears next. It is important that the End User License Agreement (EULA) is reviewed thoroughly. A hard-copy of the EULA is available by clicking on **Print**. Toggle the option that states **I accept the terms in the license agreement** to proceed. Selecting the latter option will automatically end the installation.



Click **Next** to advance.

3. AutoMate BPA Server Setup

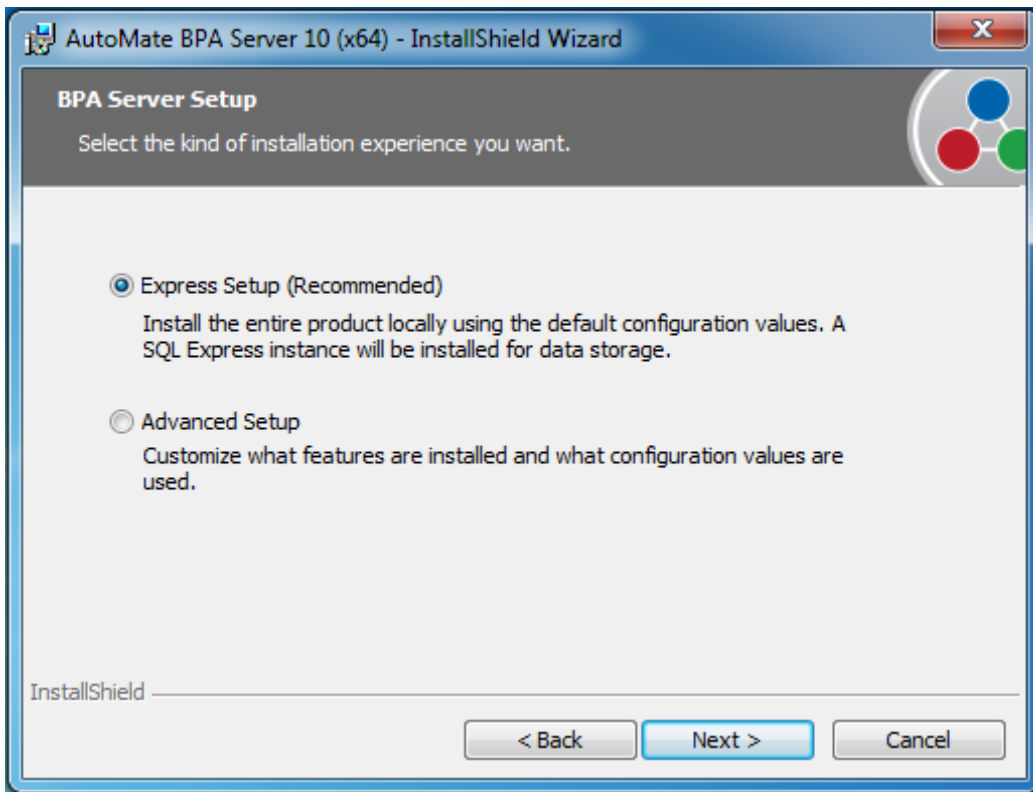
The AutoMate BPA Server Setup window (shown below) describes the two installation options that are available.

Express Setup (Recommended)

This will install all of the AutoMate BPA Server components, use default configuration values along with installing an instance of SQL Express.

Advanced Setup

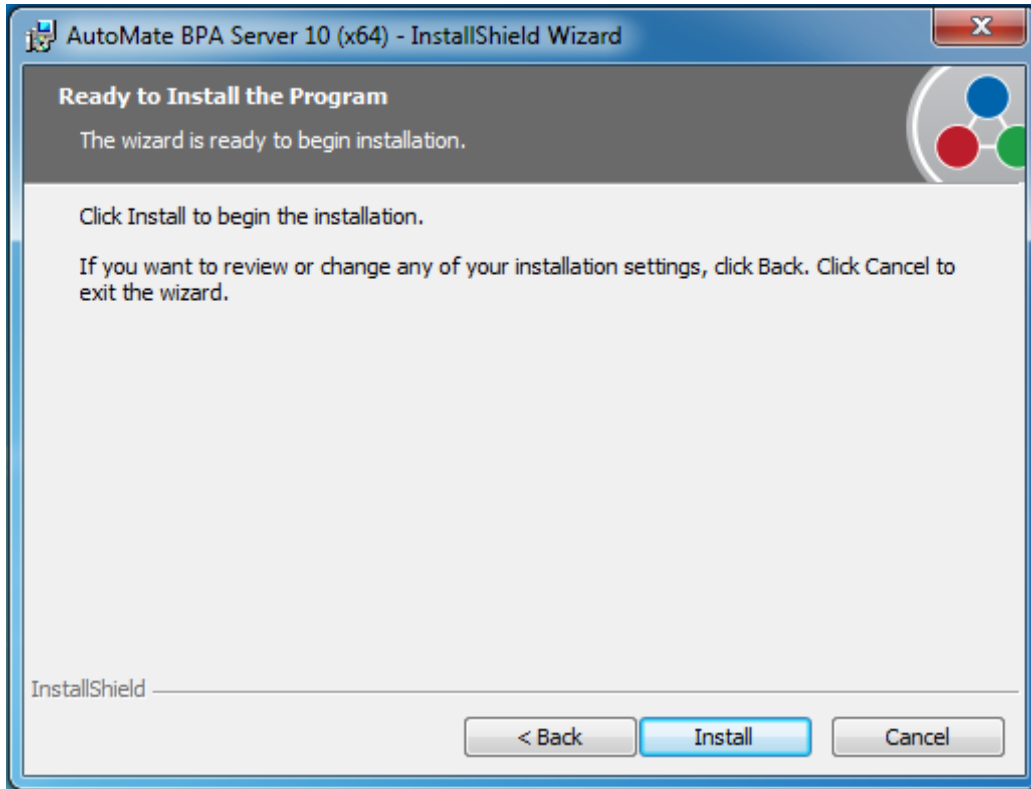
This will provide the option to customize what AutoMate BPA Server components are installed, configure values, and select a separate database datastore, such as SQL Server, MySQL or Oracle.



Click **Next** to continue.

4a. Express Installation

Selecting Express Setup will cause the following window to appear.



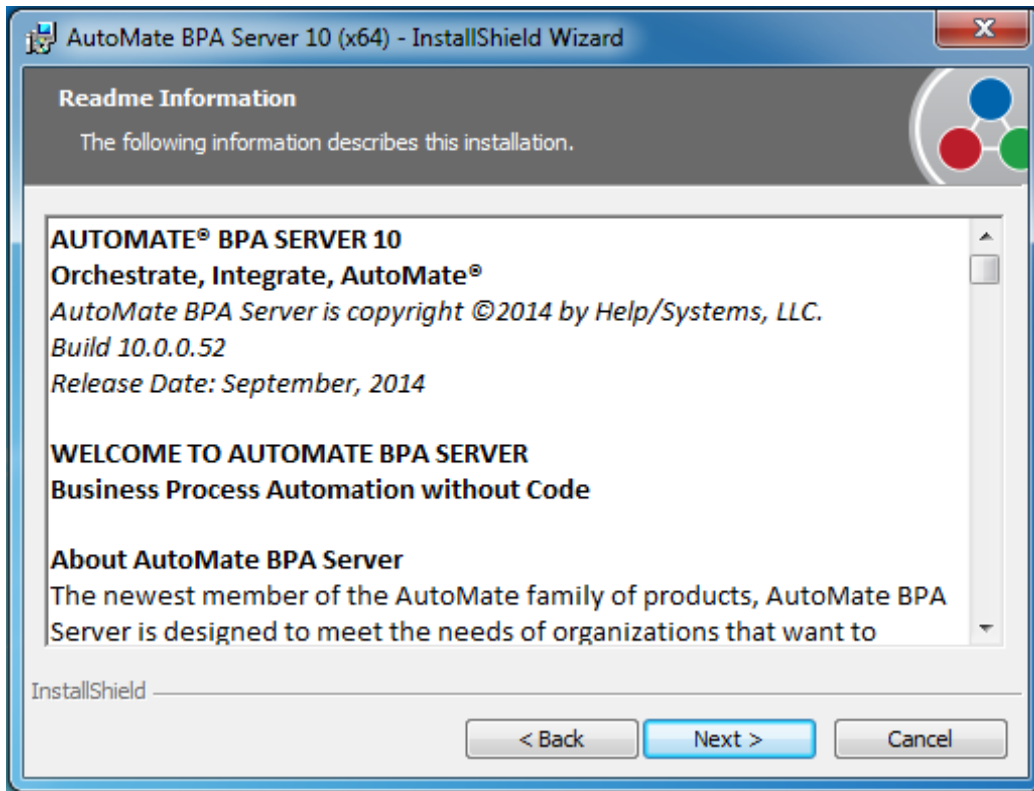
Click **Install** to install AutoMate BPA Server.

4b. Advanced Setup

If the Advanced setup has been selected, proceed to Step 5.

5. Readme Information

The Readme Information window (shown below) contains information related to the current installation including product name, current version, release date, getting started guide, special notes and company/contact information. More importantly, it outlines new features and enhancements, important known issues (if any) and any issues addressed in this specific release. This information is updated whenever a new release is available to the public.



Click **Next** to continue.

6. Custom Setup

The **Custom Setup** window (shown below) dictates which AutoMate BPA Server components are to be installed on the local machine. AutoMate BPA Server follows the client/server model of computing, in which case, one or more dedicated servers are hosts that share their resources with multiple clients. As a result, all components can be installed on the same machine or separately in different machines. This provides the flexibility to select the installation scenario that best fits the organization.

By default, all components are selected. In order to disable a specific component, left-click the icon next to the desired component(s) and select the option **This feature will not be available**. A red "X" will appear next to the component signifying that it is omitted from the installation. Details regarding each component are as follows:

Execution Server - Responsible for running all workflow objects and transmits all execution statistics back to the Management Server, which in turn stores the data. BPA Agents communicate directly with the Execution Server, whereas the Server Management Console (SMC) and Workflow Designer (WFD) communicate with the Management Server.

Management Server - Responsible for storing information regarding workflow objects as well as audit and execution data. It is basically the repository for all BPA information. When a task or workflow triggers upon the occurrence of a monitored event or condition, the Management Server sends information to the Execution Server, which in turn performs execution of all

workflow objects. The SMC and WFD communicates directly with the Management Server, whereas the Agents communicate directly with the Execution Server.

Agent - Responsible for executing workflow objects as directed by the Execution Server. Agents also detect system, application, and network conditions in order to trigger task or workflow execution.

Development Tools - The necessary tools required for workflow and task development as well as for the management of BPA Server. These tools connect to the Management Server via HTTP protocol and are comprised of three elements. The first is the Server Management Console (SMC), which is the centralized interface for the management of all automated processes. The SMC allows the storage of conditions and tasks in the Repository, the configuration of users and agents, the viewing of reports, and the configuration of system properties. The SMC is where the second element, the Workflow Designer (WFD) can be utilized to create workflows. The third element is the Task Builder, which is used to create, edit, and debug the steps of a task.

The default installation directories are as follows:

32bit installation on 32bit operating systems:

C:\Program Files\AutoMate BPA Server 10

32bit installation on 64bit operating systems:

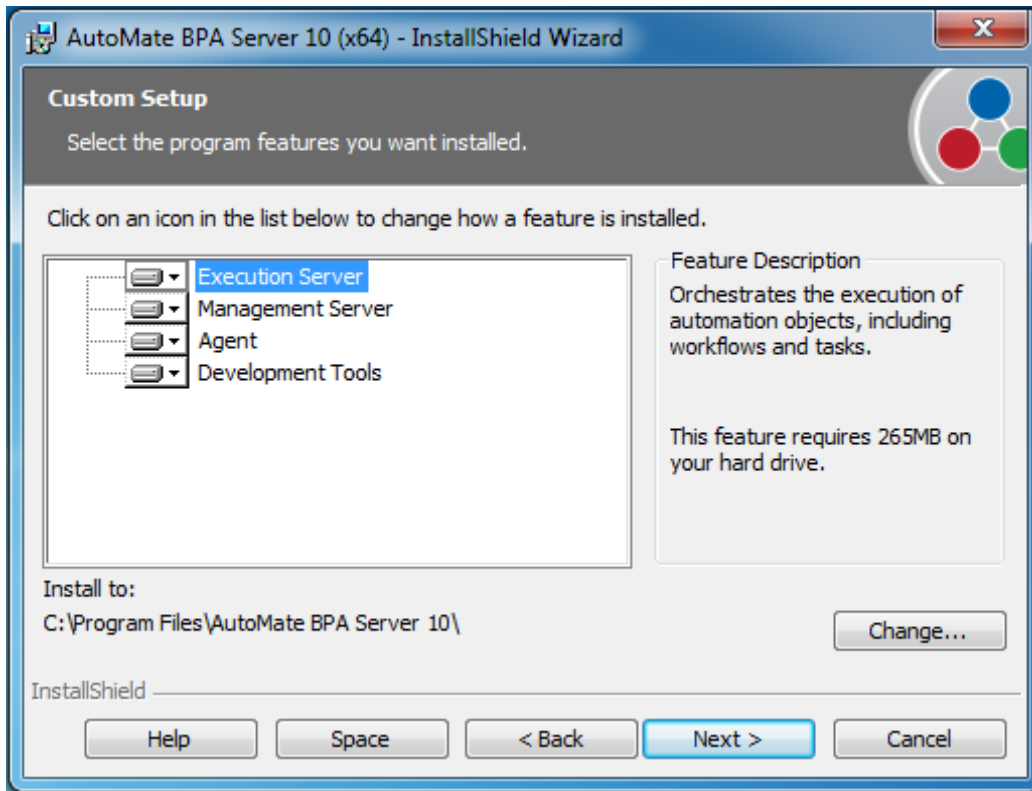
C:\Program Files (x86)\AutoMate BPA Server 10

64bit installation on 64bit operating systems:

C:\Program Files\AutoMate BPA Server 10

To install AutoMate BPA Server in a different location, click **Change** and navigate to the desired folder.

To view total disk space required to install the selected component(s), click **Space**. If a volume is highlighted, this means there is not enough disk space available to install the selected component(s).



After components have been selected for install, click **Next** to proceed.

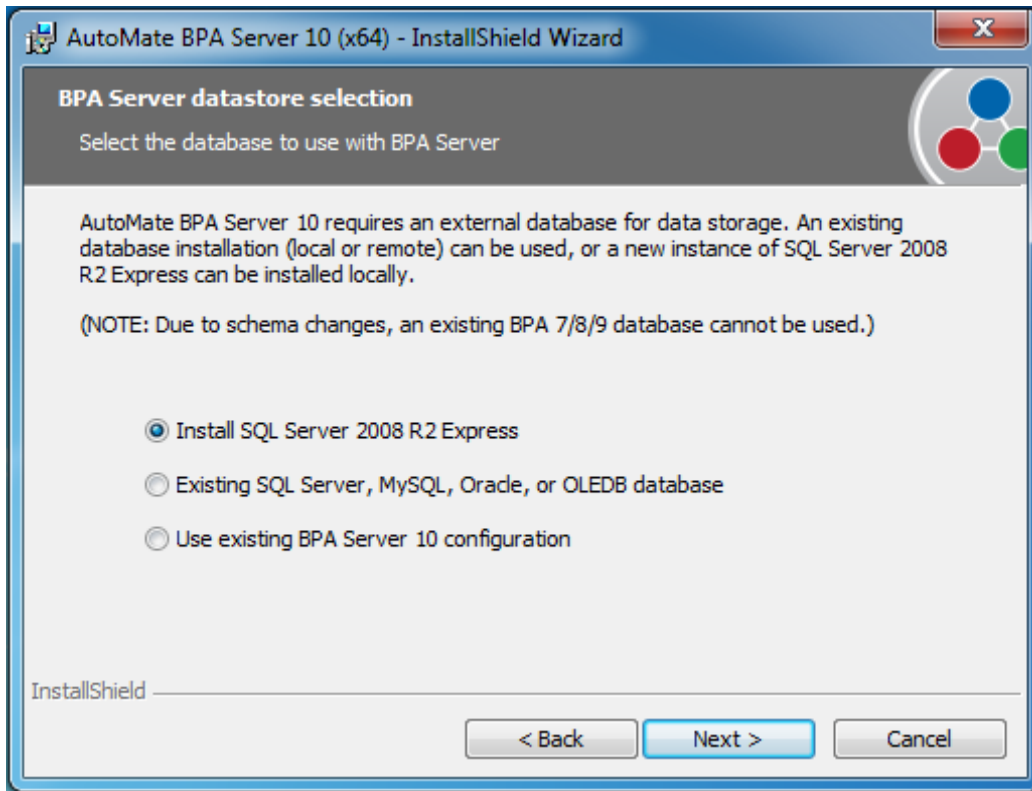
7. AutoMate BPA Server Datastore Selection

AutoMate BPA Server requires an external database for storing data. The BPA Server datastore selection window (shown below) enables specification of a database in which to use as the central data repository. All BPA Server related data will be saved to this location, including configuration settings, agent information, workflow objects, reports, logs, ports, etc. By default, a new instance of SQL Server 2008 R2 Express will be installed and configured as the datastore. Conversely, you have the option to select an existing database or use a configuration formerly set for an earlier BPA Server installation. The available options are:

Install SQL Server 2008 R2 Express (default) - Installs a new instance of SQL Server 2008 R2 Express on the local machine.

Existing SQL Server, MySQL, Oracle or OLEDB database - Store data in an existing database.

Use existing BPA Server configuration - Use an existing configuration previously installed (use only when upgrading the same major versions of AutoMate BPA Server. For example, 10.0.0 can be upgraded to 10.1.0 or 9.0.0 can be upgraded to 9.0.4 but 9.0.4 cannot be upgraded to 10.1.0).



After selection, click **Next** to proceed.

NOTE: A different window may appear next depending on the datastore option selected.

7a. SQL Server R2 Express Default Configuration

If the datastore option selected is **Install SQL Server 2008 R2 Express**, the window that appears next (shown below) displays the default configuration that applies to the installation of SQL Server 2008 R2 Express. These configuration properties can be modified only after installation is complete. The available properties and their default values are as follows:

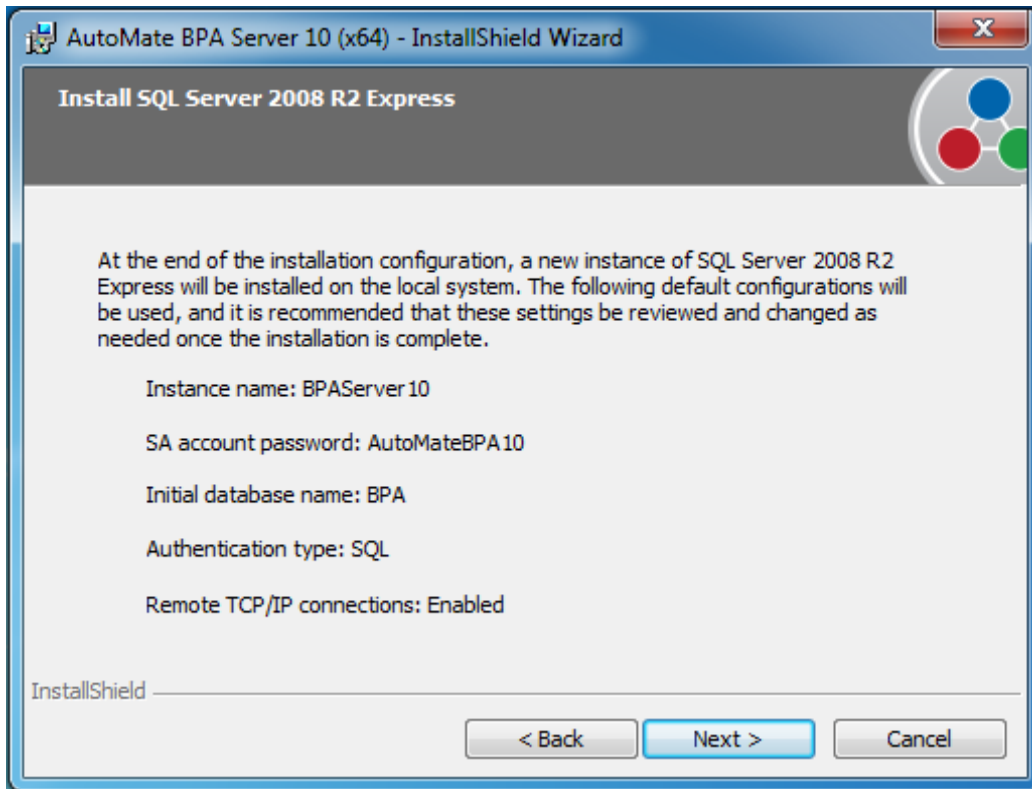
Instance name: BPAServer10

SA account password: AutoMateBPA10

Initial database name: BPA

Authentication type: SQL

Remote TCP/IP connections: Enabled



Click **Next** after reviewing.

7b. Database Connection Configuration

If the datastore option previously selected is **Existing SQL Server, MySQL, Oracle or OLEDB database**, the Database connection configuration window (shown below) appears next, allowing entry of information required in order for BPA Server to properly communicate with the existing database. Available parameters are:

Database type - The types of databases available. The available options are:

- SQL Server
- MySQL
- OLE DB
- Oracle

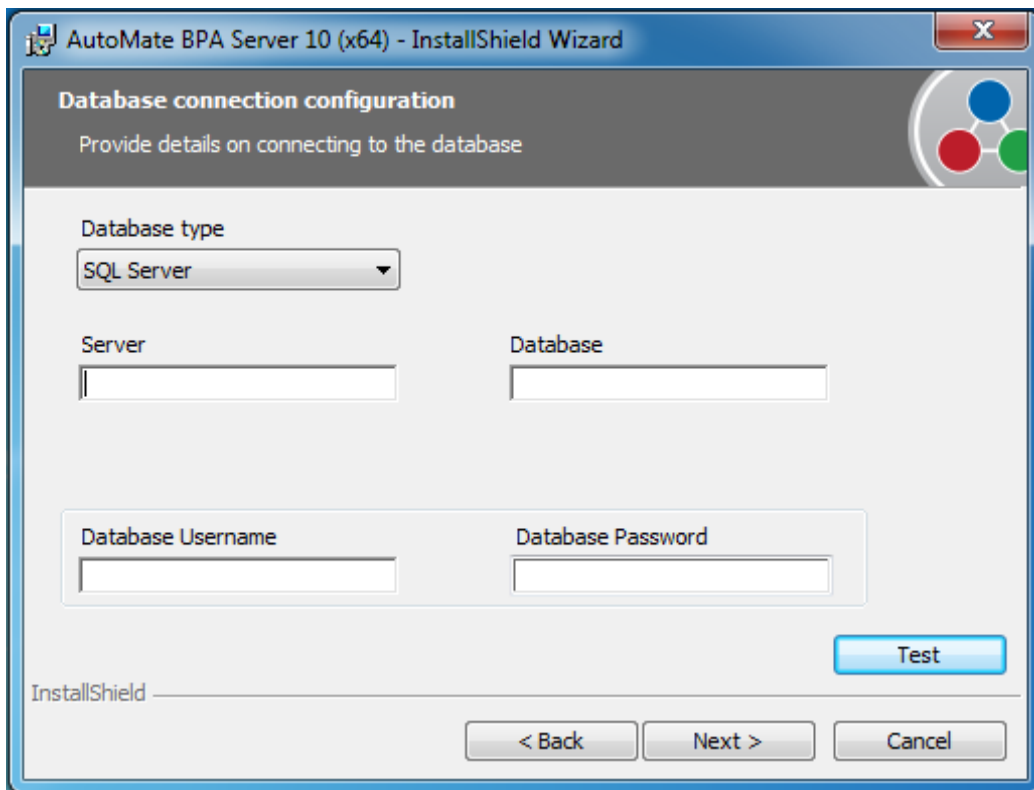
Server - The machine name or IP address on which the database runs.

Database - The name of the database server.

Database Username - The username used to connect to the server (if required).

Database Password - The password used to connect to the server (if required).

After entering the information, click **Test** to validate the connection.



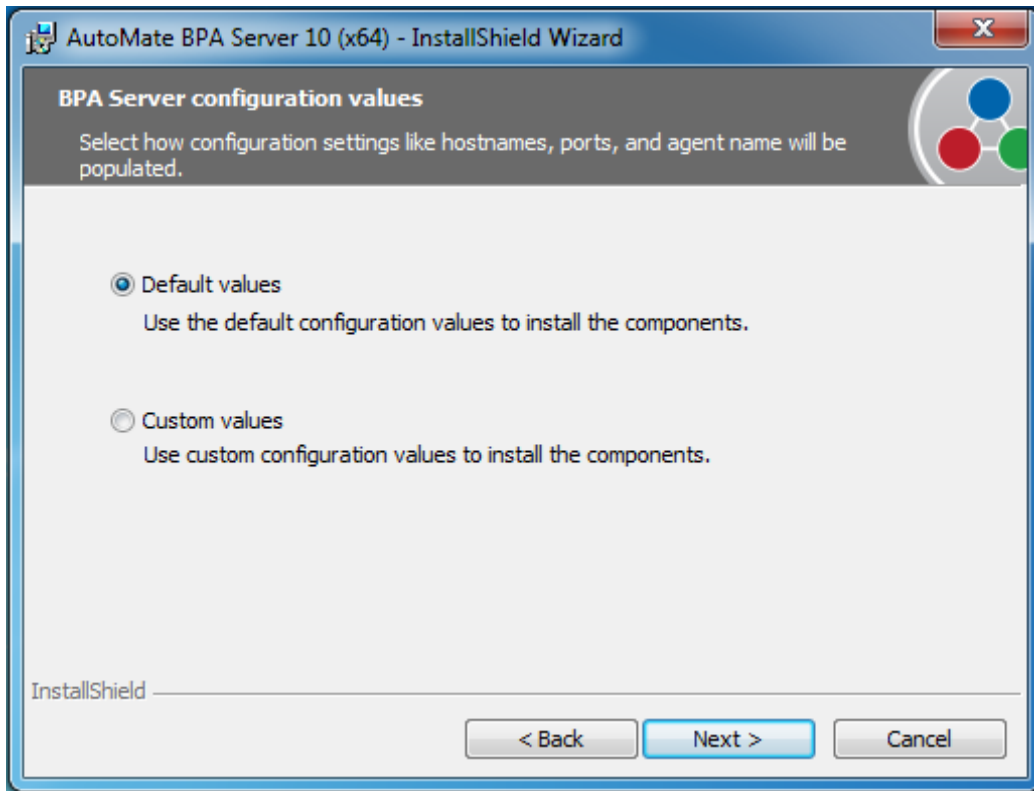
Click **Next** to continue.

8. BPA Server Configuration Values

Specific information such as server host name, IP address, server port and Agent name are required in order for BPA Server to successfully communicate with the Agent component. The BPA Server configuration values window (shown below) allows the configuration of these settings. The available options are:

Default Values - Uses the default configuration parameters which are set during BPA Server component installation. Selecting this option and clicking **Next** skips to the final window.

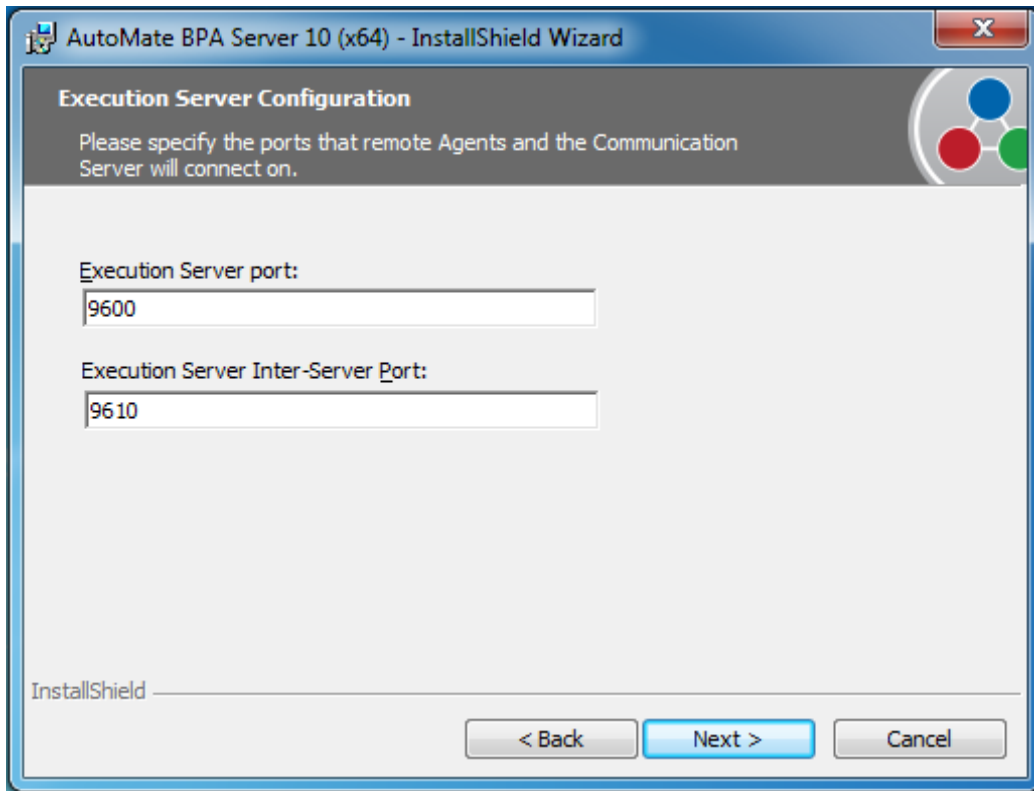
Custom Values - Allows custom entry of configuration settings. Selecting this option and clicking **Next** displays other windows allowing you to enter custom values.



Click **Next** after selection.

8a. Execution Server Configuration

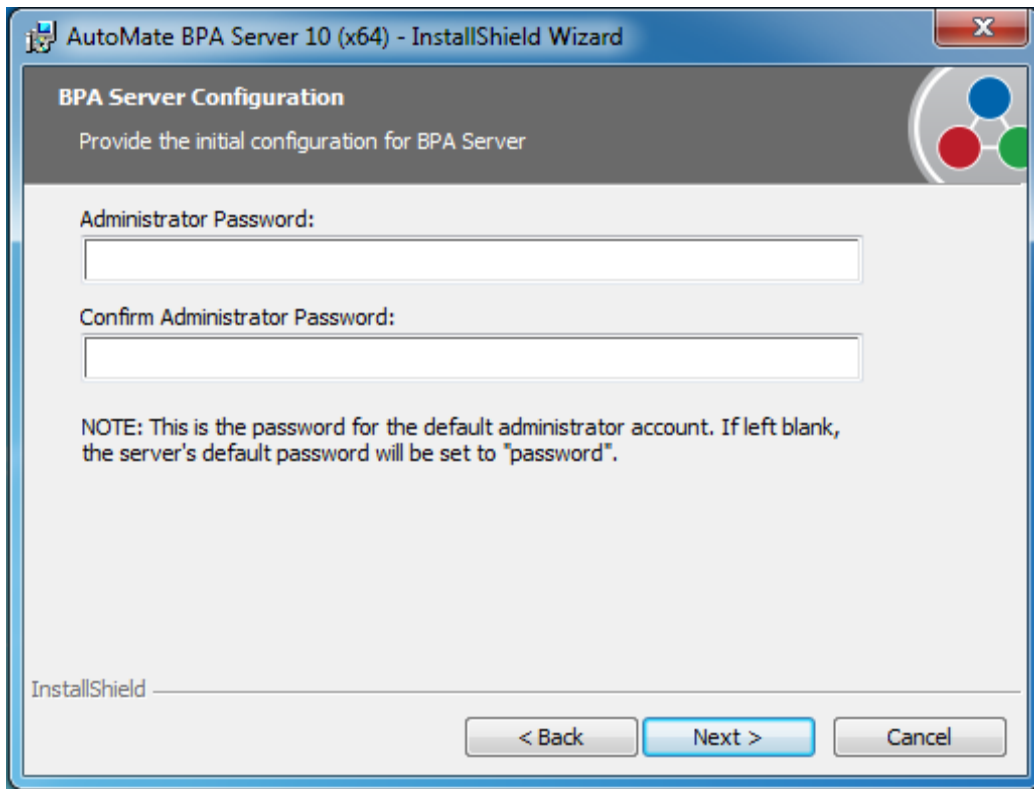
If the server configuration option previously selected is **Custom Values**, the **Execution Server Configuration** window shows up next (illustrated below), allowing entry of the ports that remote Agents and the Management Server will connect on. The Execution Server Port default value is 9600. The Execution Server Inter-Server Port default value is 9610.



Click **Next** to proceed.

8b. BPA Server Configuration

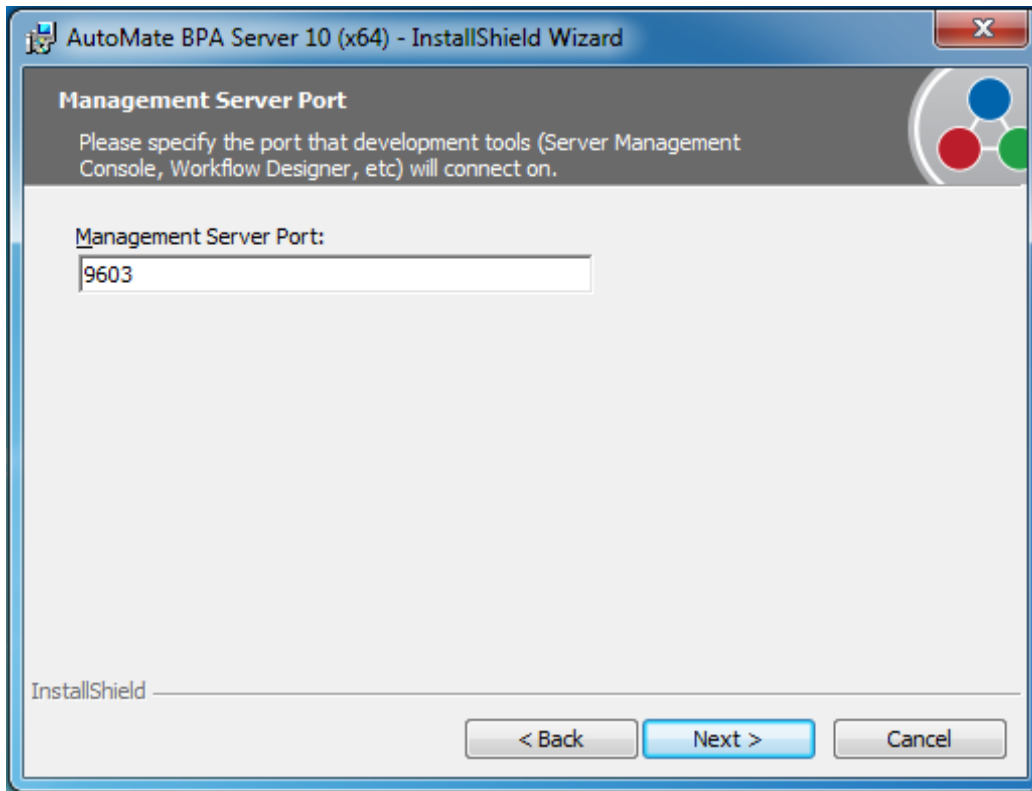
For security purposes, the **BPA Server Configuration** window (shown below) allows an administrator password to be entered. If the fields are left blank, the default password is password. This window appears only if BPA Server configuration values are set to **Custom Values**.



Click **Next** to continue.

8c. Management Server Port

The **Management Server Port** window (shown below) allows entry of the port that AutoMate BPA development tools (Server Management Console, Workflow Designer and Task Builder) will connect to the Management Server. The default value is port 9603. This window appears only if BPA Server configuration values are set to **Custom Values**.

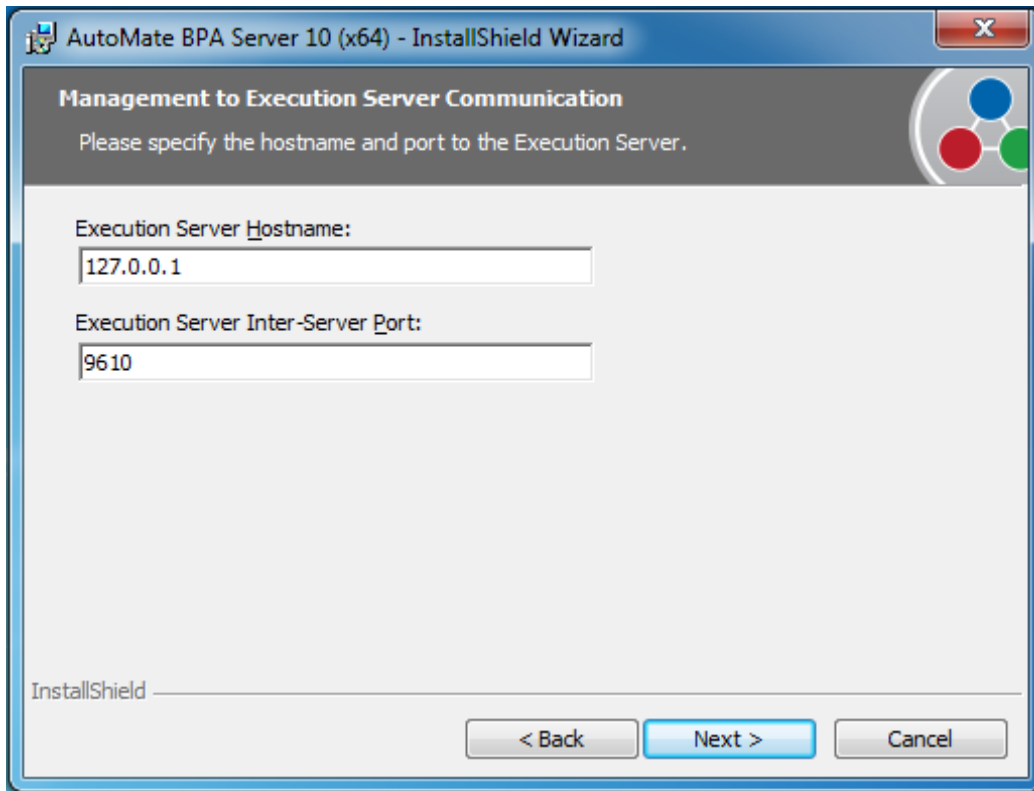


Click **Next** to continue.

8d. Management to Execution Server Communication

The **Management to Execution Server Communication** window allows entry of the Execution Server host name and Execution Server Inter-Server port. The **Execution Server Hostname** field requires the hostname of the computer that the Server component is installed on. The **Execution Server Inter-Server Port** field specifies the port that the Management Server will use to communicate with the Execution Server. The default values are 127.0.0.1 (localhost) for the Execution Server Hostname and port 9610 for the Execution Server Inter-Server Port. This window appears only if BPA Server configuration values are set to **Custom Values**.

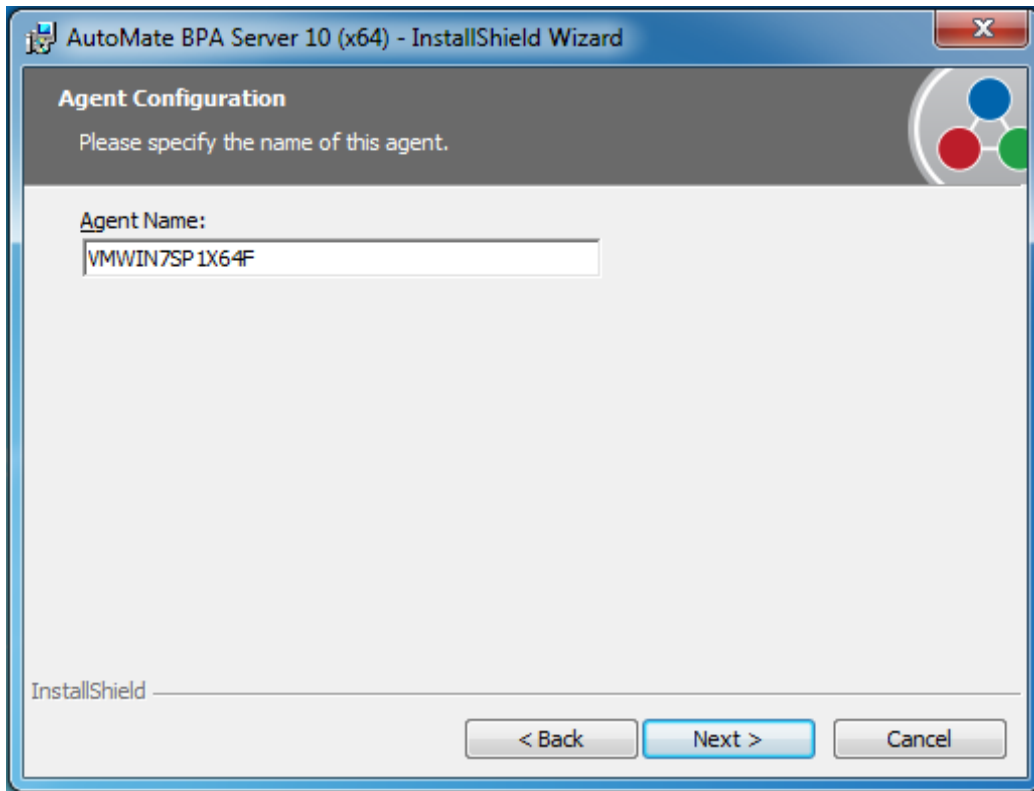
NOTE: The default value entered in the Execution Server Hostname field is 127.0.0.1, which can easily be edited. However, “localhost” may be inappropriate if the server is installed on a separate machine. Therefore, make certain to specify the correct server host name in this field.



Click **Next** to proceed.

8e. Agent Configuration

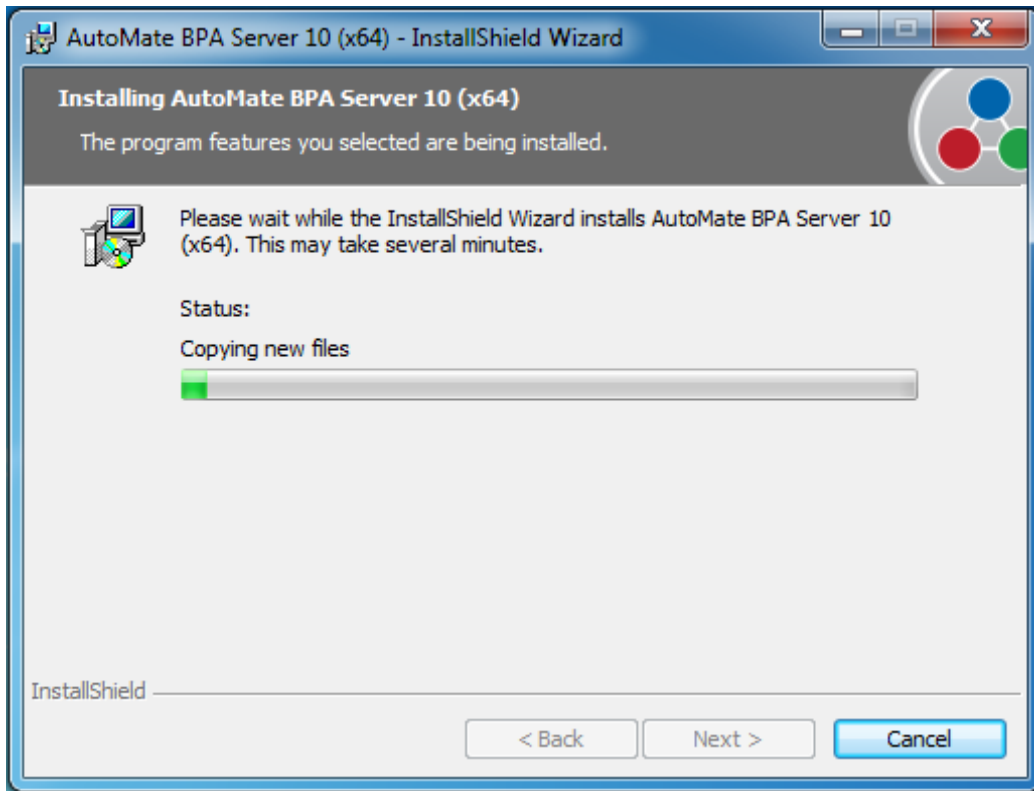
The **Agent Configuration** window requires supplementary information in order for the Agent installation to properly communicate with the Execution Server. The **Agent Name** field specifies the name of the Agent. The default Agent name is the name of the local computer. This window appears only if BPA Server configuration values are set to **Custom Values**.



Click **Next** to proceed.

9. Installing AutoMate BPA Server

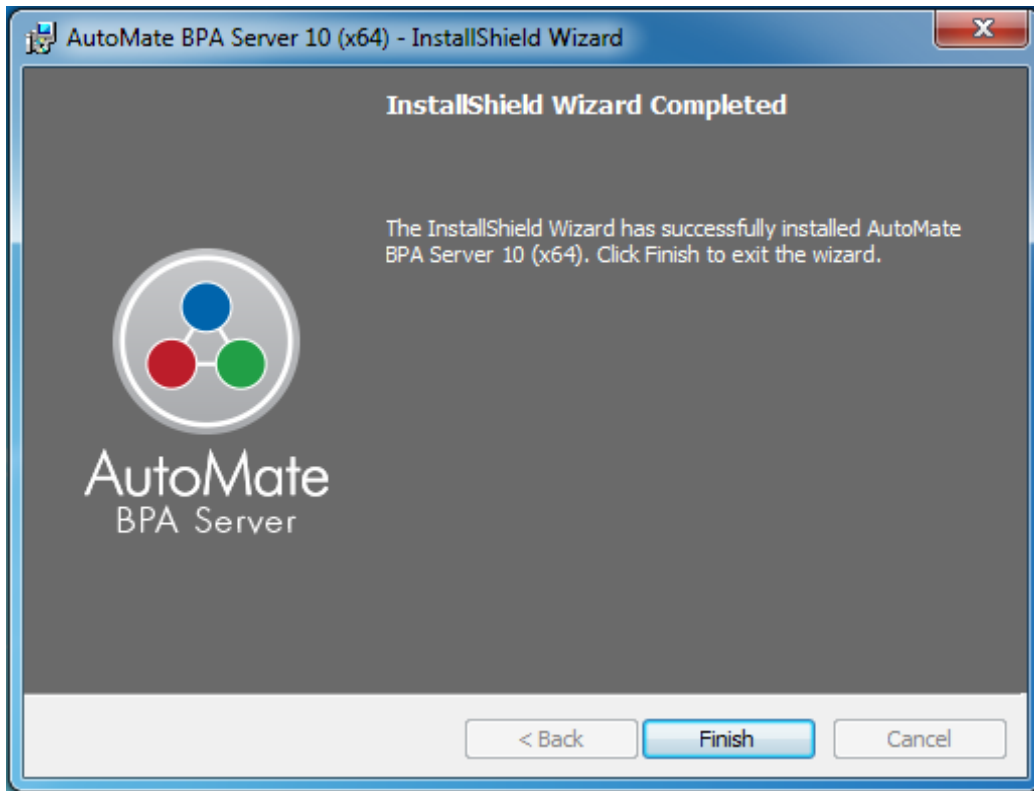
During the installation process, a window titled **Installing AutoMate BPA Server** (illustrated below) shows the progress of the current installation.



10. Installshield Wizard Completed

Upon completion, an **InstallShield Wizard Completed** window appears (shown below). This completes the installation process.

NOTE: License keys are not required during the installation process. This information can be entered in the Server Management Console (SMC) under Options > Licenses.



Click **Finish** to exit the Wizard.