

WEBCON BPS Standalone installation



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1. Prerequisites

WEBCON BPS provides different installation methods that address different platforms and user needs. This document contains a description of **Standalone** installation variant based on IIS website using the Active Directory as a user authentication provider.

1.1. Required software

- Windows Server 2016 or newer with active WEB Server (IIS) role and Windows Authentication. It is recommended to enable the Dynamic Content Compression function on the server.
- .NET Framework 4.7.2.
- ASP.NET Core Runtime 8.0 Windows Hosting Bundle.
- MS SQL Server 2016 or newer (with installed full-text search component).
- Configured Windows Active Directory or Microsoft Entra ID environment.
- Microsoft Edge WebView2 (on computers on which the WEBCON BPS Designer Studio application will be installed).
- Java 11 or higher (recommended distribution is OpenJDK).
- Portal Certificate where the domain name matches the desired Portal URL. The certificate will be necessary for the HTTPS binding during IIS website creation.

1.2. Required hardware

The document discusses two basic hardware configurations which depend on expected environment workload.

Minimum installation – for tests, demonstrations, or potentially small production environments (up to 20 users),

Recommended installation – for production environments.

1.2.1. Minimum installation ("all-in-one installation")

For the purpose of the minimum installation, the WEBCON BPS platform can be run on a single machine that meets the following requirements:

- Windows Server 2016 or newer with activated WEB Server (IIS) role and Windows Authentication,
- .NET Framework 4.7.2.
- ASP.NET Core Runtime 8.0 Windows Hosting Bundle.
- MS SQL Server 2016 Express or newer (with installed full-text search component).
- Configured Windows Active Directory or Microsoft Entra ID environment.
- Microsoft Edge WebView2 (on computers on which the WEBCON BPS Designer Studio application will be installed).
- Java 11 or higher (recommended distribution is OpenJDK)

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The recommended installation should meet at least the parameters specified in the table below.

Installation scenario	RAM	Processor	Disk space
Single server with a built-in database or a single, SQL-Server- based server	12 GB	64-bit, 4 cores	160 GB for system drive, database, and search indexing

Note:

Using MS SQL Express as a database engine limits the database size to 10 GB. It is not recommended to use the abovementioned installation for production environments with more than 20 users.

1.2.2. Recommended installation (recommended hardware configuration)

In the recommended installation scenario, the WEBCON BPS platform should operate on two independent servers: one for the MS SQL Server database engine, and the other one for the WEB IIS server and WEBCON BPS Portal.





The tables below specify the recommended parameters for both servers.

Database server

System	Database	Processor	RAM	Disk space
				- The space for system files (RAID1): 140 GB
	SOL 2014 Server		32 GB (minimal);	- Fast HDD for the tempdb database: 100 GB
Windows 2016	Standard	CORES	1/3 of the database size (optimal)	- Fast HDD disk (RAID10) for files (the size depends on the number of workflow instances): 200 GB
				number of workfl instances): 200 G

WEB Server (IIS)

System	Processor	RAM	Disk space
Windows 2014	64 bit 4 cores	8 GB (minimal);	The space for system
Williadws 2010	04-DII, 4 COIES	16 GB (recommended)	files (RAID1): 140 GB

Note:

All WEBCON BPS platform components – except the database – are installed on the WEB (IIS) server.

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1.3. Installation account

During installation, a local service is created on the server hosting the WEBCON BPS platform. The platform databases are created on the SQL Server.

The account used for the WEBCON BPS system installation must:

- hold administrator privileges on the server on which WEBCON BPS is installed,
- have sysadmin privileges on the SQL server on which the WEBCON BPS databases are installed (for the Windows Authentication and the SQL Server Authentication account).

(It may be sufficient to have the **securityadmin** and **dbcreator** privileges. The SQL Server and database logins will be created and then assigned to databases.)

1.4. Required Windows accounts

Prior to running installation create two accounts:

- a dedicated account for the WEBCON BPS service, e.g. DOMAIN\svc.bps. The account must have the "Logon as a Service" permission,
- a dedicated account for the IIS server application pool WEBCON BPS Portal, e.g. DOMAIN\pool.bps.

The account must have the "Logon as a batch job" permission.

1.5. Required SQL Server accounts

If you use the **Windows Integrated Mode** for connecting WEBCON BPS Portal with the database and for connecting WEBCON BPS Workflow Service with the database:

- create a new SQL Server login for the WEBCON BPS service account using Windows Authentication (e.g. DOMAIN\svc.bps),
- create a new SQL Server login for the IIS server application pool using Windows Authentication (e.g. DOMAIN\pool.bps).

If you use the **SQL logins** for connecting WEBCON BPS Portal with the database and for connecting WEBCON BPS Workflow Service with the database:

- SQL Server must use the Mixed Mode,
- create an SQL Server login which is to be used for the WEBCON BPS Workflow Service **and** the IIS server application pool.

The logins can be created during the installation of the WEBCON BPS platform If at that moment the user holds required privileges to the SQL server.



The WEBCON BPS installer grants public and **db_owner** privileges to the abovementioned accounts to the WEBCON BPS platform databases created during the WEBCON BPS installation.

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2. WEBCON BPS installation

If the planned installation uses user synchronization and authentication based on Active Directory (On-premises), the server on which the WEBCON BPS platform will be installed must belong to the Active Directory domain.

After downloading and unpacking the WEBCON BPS platform installer, run the **setup.exe** file. To start the installation, accept the software license agreement.



All installer steps are confirmed by clicking the **Next** button located in the bottom, right corner of the application window.



2.1. Selecting the installation mode

This document contains a description of the **Standalone** installation variant based on the WEB Server IIS. To run this type of installation, select the **New installation of WEBCON BPS**.



Select the **Standalone** option in the subsequent window.





2.2. System verification

Once you proceed to the next window, the installer checks automatically all the components required for the installation and verifies installer account privileges.



On the right side of each verified component, the installer displays graphically the test status.



- verification problem

Additionally, you can access installer messages all the time in the bottom, left corner.



If there are no problems, click Next.

2.3. Selecting components

The installer presents a list of all components required for the installation. It is possible to change some components by selecting the **Skip** option from the menu on the right.

MERCON	WEBCON BPS Components	Available ver.	Current ver.	
WEBCON	WEBCON BPS WorkFlow Service Windows Service responsible for the automation of events in WEBCON BPS	2024.1.0.3350	Not installed + Installation	-
nstallation / System verification	 WEBCON BPS Designer Studio Tool for workflow configuration and system parameterization 	2024.1.0.3350	Not installed + Installation	•
 Component selection SQL connection parameters 	WEBCON BPS Portal WEBCON BPS Portal installed on local Windows server and basted by IIS Service	2024.1.0.3350	Not installed + Installation	•
 Database creation Configuration database Content database creation 	WEBCON BPS Search Server Service that allows searching for phrases and navigation elements inside WEBCON BPS Portal	1.0.32.0	Not installed + Installation	•
 Attachments database 	Other Components	Available ver.	Current ver.	
 Archive database Portal address configuration Admin account Search Server address Finish 	♥ WEBCON BPS Modern Web Parts for Office 365 Set of Web Parts that allow to embed WEBCON BPS Portal presentation elements on SharePoint Online sites	2024.1.0.3350	b₩ Skip	•
2 0 <u>1</u> 0 1 3 🗸 0		🖧 Main menu <	Back Skip 於 Next	>



2.4. Installing components

The next window shows a summary of components to be installed. It is possible to specify the installation folders for the elements of the WEBCON BPS platform and components of the BPS Search Server.

	I I I I I I I I I I I I I I I I I I I			
System verification Component selection Components SQL connection parameters Database creation Configuration database Content database creation Attachments database IIS Website creation Portal address configuration Admin account Search Server configuration Search Server address	 Installation - WEBCON BPS Portal Installation - WEBCON BPS Search Server 			
- FILISI	Directory for Workflow components installation			
	C:\Program Files\WEBCON		 	 Change
	Directory for BPS Search Server component installation			
	C:\Pmgram Files\WEBCON			Change

Note:

A folder where the WEBCON BPS Search Server for the WEBCON BPS platform is installed also contains search index files. Therefore, it should be located on a disk providing sufficient free space for storing index files (approx. 20% of the WEBCON BPS platform volume).



2.5. Creating and configuring SQL databases

The SQL databases for the WEBCON BPS platform are created in several installer steps. Prior to creating databases, define connection parameters for the SQL server and database creation parameters.

2.5.1. SQL server connection parameters

Enter the SQL server address in the **Server** field. It is recommended to use **Windows Authentication** and select the **Trust the server certificate** option.

The user must be able to create SQL databases.

nter connection parameters his database will be used to	to an SQL server on which the WEBCON store workflow instances, attachments an	BPS database will be d system configuratio	created.		
he usemame/login in the co	ntext of which the database is created sh	ould have at least 'db	reator' and 'security	admin' level privilege	s on the SQL server.
is possible for the SQL serve such a case, the usemame vel, and also 'dbowner' privi	er admin to prepare empty databases prior Agin in the context which WEBCON BP ileges on the prepared databases.	to the installation of S will connect to the	'EBCON BPS. atabases should hav	ve the 'public' role as	signed on SQL server
T					
Туре:	SQL Server	-			
Type: Authentication type:	SQL Server Windows Authentication	•			
Type: Authentication type: Server:	SQL Server Windows Authentication	•			
Type: Authentication type: Server:	SQL Server Windows Authentication	•			
Type: Authentication type: Server:	SQL Server Windows Authentication	• •			

2.5.2. Database creation parameters

Databases language settings

This section allows you to select databases language and character encoding.

Databases owner

Select the account of a user with **db_owner** privileges in the created platform databases. The account will be used for connections between WEBCON BPS Portal and the system databases.

The installer allows you to create a new user, provide an existing SQL login, or use application pool user who will be defined in the subsequent installation steps.



Specify default language and col included in the standard encoding	ation for new created databases. Select Unicode mode if databases will store data containing characters that are not g.
Default language:	English (United States)
Collation:	English, German, Italian
)atabases owner	
opecify an account name that wi latabases.	I be set as the databases owner. The account will be used to connect WEBCON BPS Portal to the WEBCON BPS system
Create new SQL login	
User:	BPS_SQLUser
Password:	
Confirm password:	
Confirm password:	BPS_SQLUser *
Confirm password:) Use existing SQL login Password:	BPS_SQLUser ~
Confirm password: Use existing SQL login Password: Use application pool account	BPS_SQLUser

2.5.3. Creating configuration database

Enter the database name in the **Database name** field or use the default value BPS_Config. Next, specify its type in the **Database type** (production, testing, development).

The installer displays the time zone set on the database server.

t name for farm configuration database.		
Database name:	BPS_Config	
Database type:	Production	•
Time zone from database server setting:	(UTC+01:00) Sarajewo, Skopie, Warszawa, Zagrzeb	-

2.5.4. Creating process database

The process database contains all process metadata saved in the platform. Specify the name and acronym for the database in the **Database name** and **Database acronym** fields respectively. The database acronym can contain only alphanumerical characters. The installer allows for creating one or multiple process databases.

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Content datat associate the	base will be associated content database to o	with WEBCON BPS configuratio ther configuration database click	n database (its conne Change connection p	ction details have been p arameters' button.	resented below). In case you want to
Server:	SQL2019	v			
User: Database:	BPS_Config	ticationj			Change connection parameters
Content da	atabase				
characters. It BPS addin for	iguration database. Co is used to distinguish to Microsoft Outlook.	ntent database acronym is the ur o which process database elemer	nique identifier of the p nt belongs. It is placed	rocess database. It can o in 2D barcodes and in e	contain from 3 to 6 alphanumeric -mail correspondence by WEBCON
characters. It BPS addin for Content da with config	iguration database. Co is used to distinguish tr Microsoft Outlook. tabases connected uration database:	ntent database acronym is the ur o which process database elemer	ique identifier of the p nt belongs. It is placed	rocess database. It can c in 2D barcodes and in e	contain from 3 to 6 alphanumeric mail correspondence by WEBCON
Content da with config Database:	iguration database. Co is used to distinguish tr Microsoft Outlook. tabases connected uration database:	ntent database acronym is the ur o which process database elemen	ique identifier of the p nt belongs. It is placed	rocess database. It can c in 2D barcodes and in e	contain from 3 to 6 alphanumeric mail correspondence by WEBCON

2.5.5. Creating attachment database

Like in the process database, specify the name of a new attachment database. The installer allows for creating one or multiple attachment databases.

ttachments (ssociate the	database will be assoc attachments database	ciated with WEBCON BP e to other system databa	'S system databas se click 'Change c	e (its conn onnection	ection detail parameters	s have been 'button.	presented	below). In	case you w	vant to
erver:	SQL2019									
lser:	[Integrated Auther	ntication]						Change co	nnection pa	arameters
latabase:	BPS_Config						_	on ango oo		
ttachme	nts database									
pecify a nan ontent datab achments d	ne of the attachments vase. You can create a atabase to store attac	database to be created. a dedicated attachments hments in content datab	You can find the I database per ead ase instead.	st of other h process	r attachment automated l	s databases t by WEBCON	that are alı BPS. You	ready asso I can skip (ciated with creation of	selected
pecify a nan ontent datab achments d Content da	ne of the attachments pase. You can create a atabase to store attac atabase:	database to be created. a dedicated attachments hments in content datab BPS_Content	You can find the I database per eac ase instead.	ist of other h process	r attachment automated	s databases t by WEBCON	that are alı BPS. You	ready asso I can skip (ciated with creation of	selected
pecify a nan ontent datat achments d Content da Attachmer connecter	ne of the attachments ase. You can create ; atabase to store attac atabase: its databases j with main database;	database to be created. a dedicated attachments hments in content datab BPS_Content	You can find the I database per eac ase instead.	ist of other h process	r attachment automated	s databases t by WEBCON	that are all	ready asso I can skip (ciated with creation of	selected
pecify a nan ontent datab cachments d Content da Attachmer connected	ne of the attachments vase. You can create atabase to store attac atabase: its databases d with main database:	database to be created. a dedicated attachments hments in content datab BPS_Content	You can find the I database per eac ase instead.	st of other h process	r attachment automated l	s databases by WEBCON	that are all BPS. You	ready asso I can skip (ciated with creation of	selected
pecify a nan ontent datab achments d Content da Attachmer connected	ne of the attachments ase. You can create (atabase to store attac atabase: nts databases I with main database:	database to be created. a dedicated attachments hments in content datab	You can find the I database per eac ase instead.	ist of other h process	r attachment automated I	s databases i by WEBCON	that are all BPS. You	ready asso i can skip o	ciated with creation of	selected

2.5.6. Creating archive database

The WEBCON BPS system allows users to archive entered data by moving them to a dedicated database. The installer can be used to create any required number of databases.

rchive datab ssociate the	ase will be associated archive database to d	d with WEBCON BPS system o other system database click 'C	database (its co hange connec	onnection details tion parameters' t	have been presen outton.	ted below). In case you want to
Server:	SQL2019					
User:	[Integrated Auther	ntication]				
Database:	BPS_Config					Change connection parameters
Archive da	tabase					
The archive fe Specify a nam latabase. You	eature is only available le of the archive data u can create a dedica	e in ENTERPRISE edition. base to be created. You can f ited archive database per eac	ind the list of of h process auto	ther archive data mated by WEBC	bases that are alrea ON BPS. You can	ady associated with selected content skip creation of archive database.
The archive fe Specify a nam Jatabase. You Do you	eature is only available e of the archive data µ can create a dedica µ wish to create an an	e in ENTERPRISE edition. base to be created. You can f ited archive database per eac chive database?	ind the list of of h process auto	ther archive data mated by WEBC	bases that are alrea ON BPS. You can	ady associated with selected content skip creation of archive database.
The archive fe Specify a nam latabase. You Do you Content da	eature is only availabl e of the archive data µ can create a dedica µ wish to create an an tabase:	e in ENTERPRISE edition. base to be created. You can f ited archive database per eac chive database? BPS_Content	ind the list of of h process auto	ther archive data mated by WEBC	bases that are alrea ON BPS. You can	ady associated with selected content skip creation of archive database.
The archive fe Specify a nam Jatabase. You W Do you Content da Archive da with main d	eature is only available of the archive data u can create a dedica wish to create an an tabase: tabases connected latabase:	e in ENTERPRISE edition. base to be created. You can f ted archive database per eac chive database? BPS_Content	ind the list of of h process auto	ther archive data mated by WEBC	bases that are aire; ON BPS. You can	ady associated with selected content skip creation of archive database.



2.6. WEBCON BPS Portal installation

2.6.1. Creating website on the IIS server

For the Portal purposes it is necessary to create an additional application on the IIS server.

Enter the name for an application which will be created for the WEBCON BPS Portal and the application pool user.

S Website creation		
Application pool		
Name:	WEBCONBPS	
User:	WEBCON\pool.bps	
Password:	•••••	
Website		
Site name:	WEBCONBPS	
Content physical path:	C:\Program Files\WEBCON\WEBCON BPS Portal	
Binding		
Туре:	https	•
IP address:	All Unassigned	•
Port:	443	
Host name:	https://bps.webcon.com	
SSL certificate:	WEBCON	•
egistry entries		
Set Http parameters	MaxFieldLength and MaxRequestBytes registry to max value	
	Enable Http://lip.apd.Enable.Http://lipatev.mojeta/to.0	

2.6.2. Configuring the Portal address

The step is used for defining the URL address under which the WEBCON BPS Portal will be available. It is recommended to use the full, FQDN domain name.

Select the method for connecting the Portal website with databases. An integrated login is used in the example.

Server:	SQL2019		
User:	[Integrated Auth	entication]	
Database:	BPS_Config		Choose configuration database
Portal add	ress configurati	on	
Portal uni:	http	s://bps.webcon.com	
Fondi un.			

2.7. Configuring administrator account

The built-in administrator account allows for logging into the system to configure it where no users have been defined in the system yet (the user list synchronization has not been configured and executed).

Apart from the ability to change configuration, the administrator account has no permissions to define applications and processes.

The built-in administrator account has a fixed login <u>admin@system.bps</u> – define the password for this user in this installation step.

Server:	SQL2019	
User:	[Integrated Authentication]	
Database:	BPS_Config	Choose configuration database
Admin acc	ount configuration	
Set a passwo It will be possi If the passwor	rd for the admin access account. ible to change this password through the main menu of Designer Studio. rd is lost, it can be reset through the WEBCON BPS System Administrators tool.	
Login:	admin@system.bps	
Password:	•••••	
Confirm pas	sword:	
After installi Launch Des - set the syr - assign priv - activate ar	ng WEBCON BPS, only one authentication provider will be active at the beginning – the Admin acc signer Studio, log in using the administrator account, and finalize the system configuration: ichronization schedule and synchronize the BPS user list rileges to users (including admin privileges) ny authentication providers that you need be define account where the structure provider	cess.

Once you complete the installation using the administrator account, log into the WEBCON BPS Designer Studio to configure the user list synchronization (the procedure is described in 4.1).

2.8. Configuring WEBCON BPS service

When configuring the service, it is required to enter the login and password of a domain user.

Select the **Remember for the service update** checkbox to save time in future – the data will be automatically entered during system update.

The installation allows for selecting roles supported by the installed service. By default, only the **Basic features**, **License service** and **SOLR indexer** (searching) roles are activated.

kflow Service is used to titutions, print barcodes	handle importing attachme and more.	nts from shared folders and Exchange email in	boxes, control actions, OCR documents, handle
ervice account			
Login: WEBCO	ON\svc.bps		Example: domainNogin
Password:	•••••		
Rer	member for the service upda	ate	
arm configuration databa	ise		
erver: SQL201	9		
lser: [Integrate	ed Authentication]		
latabase: BPS_Co	nfig		Change connection parameters
ssociated process datab	ases		
Database			📑 Add
BPS_Content			
			Ca Remove
Basic features		Workflow instance archiving	
	most of accord files		
	inport of scanned files		
	indox monitoring		
OCR AI		SOLR indexer	
Al Analysis			

2.9. The service status

After its installation, the service is not automatically launched. This step allows you to start the service.

orkflow Service is user ostitutions, print barco case the Workflow Se	d to handle importing attachments from shared folders and Exchange email inboxes, control actions, OCR documents, handle des and more. rvice cannot be started please see Event Log.
Service status:	O Service is running
	Start service
	Stop service
Service messages:	

2.10. Installing and configuring the Search Server component

The administrator can specify a dedicated port for the Search Server, the volume of RAM available for the service, and set up passwords for the search engine administrator user (login: solr) and the user within whose context the search engine will index the WEBCON BPS databases (login: WEBCON_BPS).

erver: S	QL2019
lser: [l	ntegrated Authentication]
)atabase: B	PS_Config
Search Server	configuration
pecify the protoc preater for the Zoo lease make sure rovide the user p lease remember	col, host address and port on which the Search Server service will run. The system will also automatically use the port with a number 1000 okeeper service. that both these ports are available to all WEBCON BPS components. asswords used by the Search Server service. to safely store the Solr admin password. It is not remembered anywhere in the WEBCON BPS system.
Protocol:	http ~
Host address:	
	This address will be used by BPS for connecting with Solr. e.g. mycompany.com
Port:	8983
	For Zoo Keeper port 9983 will be used
Memory:	2GB 🗸
	Maximum amount of memory, that search server can use (2GB recommended)
Certificate	
Path:	🚔 Browse
Password:	
Users password	ds
solr:	
	Admin user, can log in to Solr Admin page
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_	

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3. Configuring firewall

WEBCON BPS Portal requires **443** and/or **80** ports to be open to receive the https/https traffic (unless alternative ports have been provided).

You must ensure the communication between the WEBCON BPS Portal server and the MS SQL database sever. By default, the **SQL TCP (port 1433)** port is used for the aforementioned communication.

4. Starting WEBCON BPS Designer Studio for the first time

After completing the installation, run WEBCON BPS Designer Studio – a tool for managing the platform. When running the tool for the first time, the application shows an authentication window where you need to enter the address and password for the built-in administrator account (admin@system.bps) specified during installation.

ଦ୍ଧ Portal a	uthentication	×
Portal URL:	https://bps.webcon.com	
	Log in via browser	🤣 Connect
	WEBCON	N
	WEBCON BPS Admir	י I
	Access	- 11
	Please sign in with your WEBCON BP administration account	s
		6
	Accept	- 11
		_
		Cancel

By clicking the **Log in via browser** checkbox, you can authorize a user in a browser displayed within the authentication window.

Once you are logged-in, you can start working with WEBCON BPS Designer Studio.

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4.1. Configuring user list synchronization

To allow other users to work in the WEBCON BPS platform, configure and run user synchronization with the selected authentication platform, and activate authentication provider for users to be able to log into the platform. In the discussed example the local **Active Directory** is used for this purpose.

In the left navigation panel, click the **System settings** and expand the **Local parameters** node to select the **Users and groups synchronization** and click the **Synchronization configuration** button.

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System settings	⋲	System cotti	nac				
) To Global constants	^	system setu	ngs (Users and gro	ups synchronization)		PRODUCTIC	
Business rules		Refresh Synch	ronize now 🔻 🗔 Synch	ronization configuration			
Garage Automations		-g		ganal			
୍ର /ମୁକ୍ତ Automations ଜୁଲି Global fields		Last synchronization date:	:	Status:		E	
Licenses allocation		Next synchronization date					
Global parameters							
(2) Appearance		신입 Synchronized users	A Synchronized grou	ps 🛛 🔛 Synchronization history			
Solution of the second		Search:					
🔆 Change Requests							Q
Designer Desk Permissions					-		
🥟 Attachments		BPS ID	Name	▲ E-mail	Source	Last update date	(支)
😭 Database							Ê
Security							
Active Directory Actions Configuration							
Users and groups synchronization							
🙉 BPS users and groups list							
Translation languages							
★ Translation languages ■ Interface language packs							
Translation languages	Ţ						
Translation languages Interface language packs Cache Image: Second pack pack pack pack pack pack pack pack	-						
Yranslation languages Translation language packs Cache Seal notifications Applications	•						
Yranslation languages Translation language packs Cache Applications Applications	•						
Translation languages Translation language packs Cache Searcher Applications Data sources System settings	* ·						
Translation languages Interface language packs Code Applications Data sources System settings Plugin packages	*						Ţ

Select the Synchronize with local Active Directory option as a synchronization source.

The account used for both the configuration and user list synchronization must hold privileges to read the **Active Directory** structure. This can be an account the WEBCON BPS Workflow Service operates on or a dedicated account. The configuration of an account for synchronization can be modified in the **Credentials** tab.

ynchronization	source:	Synchronize with local Active Directory	· ()	
Gettings	¶≡ Credentials	🛗 Schedule 🛛 🔧 Advanced		
🔍 Connect usin	ng BPS service user	ata		
Onnect usir Connect usir	ng BPS service user ng given data	ata		
Connect usir Connect usir Login:	ng BPS service user ng given data	ata		

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In the **Settings** tab, specify one or several domains from which the user data will be synchronized by using the **Add** button (a + icon next to the selected domains list). it is possible to use the whole domain (root) or only specific organizational units (OU).

	Synchron	nize with local Ac	tive Directory	-	(\mathbf{i})		
Settings ♀= Credentials	🛗 Schedule	🔧 Advance	d				
Domain/Organizational unit							• 🕀
webcon.pl							Θ
Database column		1	Columns mapping				
Database column COS_ExtensionAttribute01		1	Columns mapping				▲
Database column COS_ExtensionAttribute01 COS_ExtensionAttribute02			Columns mapping				•
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In the **Schedule** tab, you can define the time and method of synchronization.

By default, the synchronization will be executed every day in three-hour intervals. The **Incremental** synchronization will be launched (data of modified users will be retrieved).

To confirm the changes in the user list synchronization click the **Save** button.

Note:

When launching the WEBCON BPS Designer Studio for the first time, run at least one Full user list synchronization (retrieving information on all user of domain or OU specified in the configuration).

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To manually start the **Full** user list synchronization, click the **Synchronize now** button in the **Users and groups synchronization** window (in the **System settings** section) and select the **Full** option.

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System settings	System se	ttings (Users and	groups synchronizatior	1)		PRODUC		Ð
) ∰ Business rules) @ Form rules) @ Automations) @ Global fields @ Global parameters () Appearance	Last synchroni Next synchroni	rnchronize now Full Incremental Sylver Sylv	nchronization configu 3 3:00:29 PM 3 6:00:00 PM roups Ynchroni	ration Status: zation history	Finished	E		
2 Global privileges	Drag a column heade	er here to group by that col	umn					
Designer Desk Permissions	Start time	Duration	Status	Warnings count	Errors count	Mode	Details	
Attachments	5/8/2023 3:00:13 PM	00:00:1	5 Finished with warni				· 🖻	<u>_</u>
Database Security Active Directory Actions Configuration Users and groups synchronization AR, BPS users and groups list								

The information on the status of the synchronization is available in the same bar.

E	Finished	Status:
	Finished	Status:



4.2. Activating the authentication provider

By default, the only active authentication provider that allows for logging into the platform is **Admin access**. It allows users to log in only with the built-in administrator account.

Activation of authentication provider of **Windows Active Directory** type allows users whose data are synchronized in accordance with the procedure described in the 4.1 point to log into the platform.

Note:

To actively use the platform, users must be assigned with relevant privileges to the application and/or processes and – in subscription-based model – named licenses.

To activate the authentication provider, click the **System settings** button, expand the **Authentication providers** node in the selection tree, and select the **Windows Active Directory** option.

Select the following two options: Active in Designer Studio and Active in BPS Portal.

Once you modify settings and save changes, restart WEBCON BPS Portal.

Lass Appearance System settings C ⑦ ⑤ Global constants ● ⑦ ⑥ Global constants ● ⑦ ⑥ Business rules ● ◎ ⑥ Cobal fields ● ⑨ Consers allocation ● ● ⑥ Global parameters ● □ Holf-olders ● ● ⑧ Consers (Projects) ● ● ◎ ① Authenitom providers ●	Production Commission
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4.3. Adding privileges for selected users

The built-in administrator account should be used only for the purpose of initial platform configuration and in exceptional situations.

For the actual use of the platform, it is necessary to assign access rights to relevant users.

In order to add system administrator privileges (full access to system and application configuration), click the **System settings** button, expand the **Global parameters** node, and select the **Global privileges** option.

Click the **Browse** button located next the **System administrators** list.



Next, in the searching window, enter user login or their login and click Search.

If user data had been correctly retrieved during the user list synchronization, a relevant entry will show up on the list. Select the respective user on the searching list (by left-clicking the relevant entry), press the **Add** button, and confirm the whole operation with the **OK** button.



Tom Green				Q Sear	ch
Display name	Title	Department	E-mail address	Account name	
Tom Green				webcon\t.green	
A					
	C				
26 Add ->	iom Green;				-

Additionally, click the **Save** button to apply the changes.

Tasks Appearance		🔔 System administrator (admin@system.bps)
System settings ∋ T ₆ Global constants ⇒ E Business rules	System settings (Global privileges *)	PRODUCTION CO
 값 Form rules 값 Automations ③ 값 Global fields 않 Licenses allocation ※ @ Global parameters 	System administrators: <u>Tom Green;</u>	- 23
Appearance A Gobal privileges * Change Requests		₽¤.

From now on, the configured user will be able to log into WEBCON BPS Studio to execute all administrative procedures, including assigning privileges to the created applications and processes.

5. Activating license

After installation, the WEBCON BPS platform works in DEMO mode (full functionality for 90 days). To change the DEMO version to production one, activate the license obtained when purchasing the product.

The activation is possible in the WEBCON BPS Designer Studio or in the installer.

5.1. Activating license in WEBCON BPS Designer Studio

Once you launch WEBCON BPS Designer Studio, click the arrow in the top, left corner and select the **Licenses** option.



A panel for managing licenses is displayed.



Service not a	tivated	Service acti	ate
License	Bought	Used	
Production environment	The Install license from file	Download licenses	Refresh

Next, click the **Activate** button to open service and license activation wizard which will guide you through the activation process.

If a server hosting the WEBCON BPS components has a direct access to the Internet, you can activate your product in the online mode.

Activation		
License service activation wizard The wizard will guide you through license service activation.	 Select activation kind Online activation Allows automatic online activation of license service. Requires customer login and password. Email activation - no activation file Allows sending activation data by email. Select if online activation is unavailable and you do not received the activation file yet. Email activation - activation file available Allows license service activation using received activation file. 	
PREV	NEXT 🗰	



Step 1 of 2 - Online activation		
Online activation Online activation uses outbound connection with address https://licence.public.webcon.pl using port 443. If this connection is blocked and there is no possibility of unblocking it, please return to first step and choose "Email activation". To activate, please type the provided customer login and password and click "Activate" button.	Login [Password Activat	e
PREV PREV	NEXT	•

The activation involves entering obtained activation login and password.

Where no Internet connection is available, you can active your product in the offline mode following the steps in the activation wizard.

5.2. Activating license offline

The offline activation consists of two steps. First, generate the **Service license identifier** file and send it to WEBCON. You will receive two files in response: **Activation file** and **License package** which you need to use to activate the license.

To start the offline activation procedure, open the **License management** panel and click **Activate**. Next, select the **Email activation – no activation file**.





In the next wizard window, click the **Generate file** button, save the file on a local disk, and send it to WEBCON.

Step 1 of 4 - Generate service identifier		
Generate license service identifier Service identifier is needed to generate activation code for license service. It should be generated, and then written to file. Remember file location, as it will be needed in next activation step.	License service computer name: Identifier file location:	€ ⁰ , Generate file
PREV PREV		NEXT

In response, WEBCON sends two files: Activation file and License package.

To complete the offline activation process, open the **License management** panel, click the **Activate** button and select the **Email activation – activation file available**.

Follow the wizard hints and specify the path to the activation file.

Next, in the **License management** panel, select the **Install license from file**, and specify the path to the other file received from WEBCON (License package). Click OK.

The offline activation process is completed.