



vFire Server Console Guide
Version 1.5

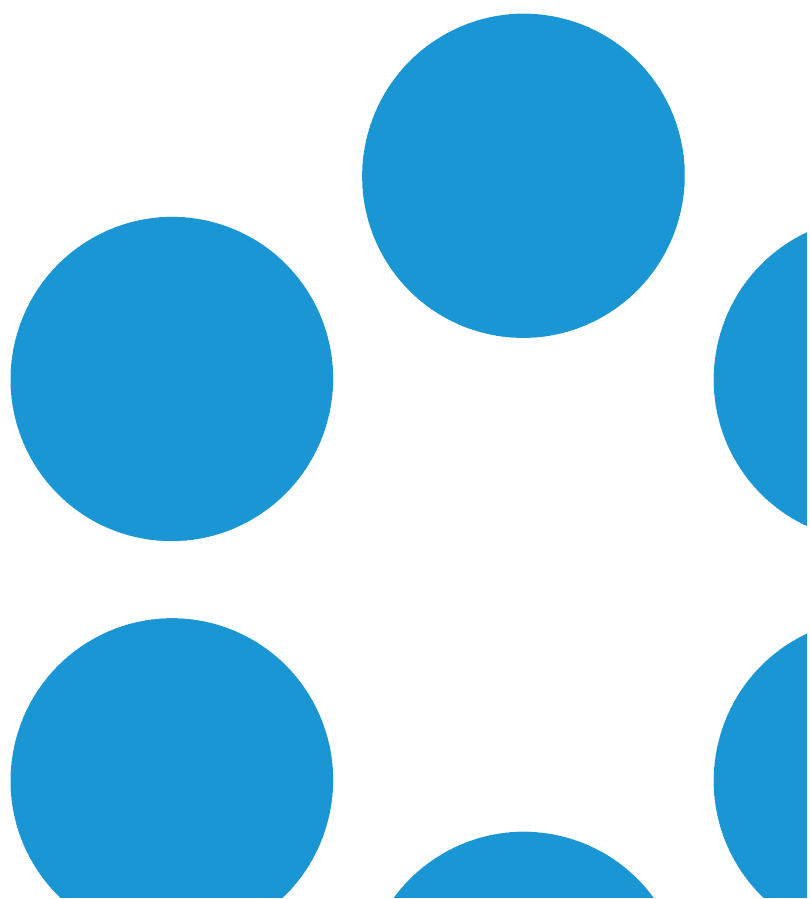




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Version Details

This guide supports the version of the product listed, and supports all subsequent versions until the document is replaced by a new edition. The table below contains version details for the guide.

Version Number	Date	Details
1.0	12 June 2015	This document describes the processes involved in creating and configuring the server console for vFire Core 9.2.2.
1.1	17 July 2015	Minor update following comment and feedback
1.2	25 September 2015	This document was updated to reflect the release of 9.2.3 and contains minor changes and updates based on feedback
1.3	7 September 2016	This version reflects updates following the 9.6 release
1.4	25 January 2017	This version reflects updates following the 9.7 beta release, which includes the introduction of a Run Custom PowerShell Scripts option on the Server Console Properties window which you can use to configure your settings in order to run the Alemba API. See page 37 for more details.
1.5	10 August 2017	Updated to remove Oracle, which is not supported in vFire 9.9.0 onward.
1.6	31 January 2018	Released in conjunction with the 9.10 software release. There have been no significant changes in the documentation for this release.

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About this guide

This guide describes how to create and configure your server console, as well as carry out server console system tasks on the latest version of vFire Core 9.2.






This guide contains instruction for the latest version of the vFire Core software. For earlier versions of vFire Core please refer to earlier versions of the guide as outlined on [page 4](#).

Intended Audience

This guide is written for system administrators responsible for installing vFire.

Standards and Conventions

The following standards and conventions are used throughout the guide:

	Prerequisites, including security rights and access you may need prior to completing the task. Prerequisites are also highlighted in a shaded box.
	Information related to the current topic that may be of particular interest/significance. Notes are also highlighted in a shaded box.
	Warnings. These are also highlighted in a shaded box.
Field name	Fields are highlighted in bold text.



Introduction

You can use the vFire Server Console application to create, rename, delete and configure your vFire Core systems from 9.2 onwards. You can also use the Server Console to perform a range of tasks, such as archiving calls, and importing/exporting workflow templates.

The following topics will take you through how to access the server console, and create and maintain your system.

- **Accessing the Server Console**
- **Creating a new system**
- **Configuring your systems**
- **Server Console system tasks**

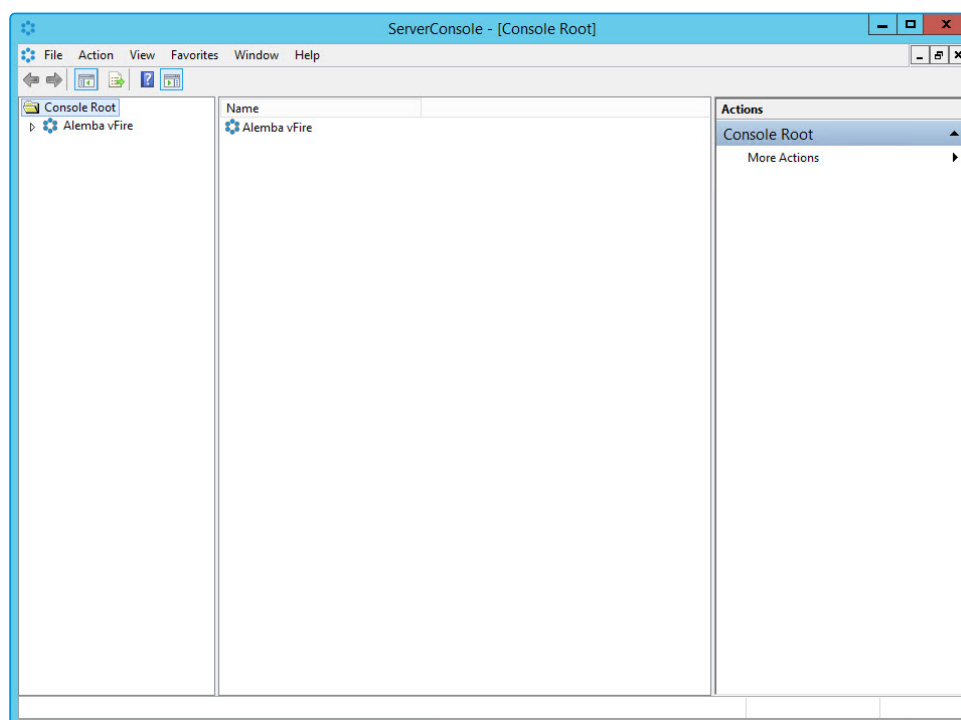


Accessing the Server Console

From the **Start** menu, select the Server Console, selecting **Yes** if prompted to confirm. This displays your Console Root window, which is your vFire Core Server Console.

The Server Console window is divided into three panes.

- The left pane displays the folder structure within the Console Root folder. From the main Alemba vFire node you can create a new vFire Core system. Each system you add is listed below the main node.
- The middle pane displays the files or items within a selected folder.
- The right pane displays tasks and actions you can perform based on the current node or folder.





Creating a System

You can create a new vFire Core system using the **New System Wizard**. The wizard guides you through the steps for creating and configuring a new vFire Core system.

Before you start

Before you create a new system, you must have:

- The prerequisite hardware and software, as described in the **Prerequisites Guide** for your version of the software
- A license key, which will be provided by your Account Manager
- Set up your database
- Database Login ID and password, or Windows Authentication to the database, with appropriate permissions to make schema changes, as provided by your database administrator
- Configure the vFire Server and installed vFire Core, as described in the **Installation Guide** for your version of the software

Further documentation is available on the Alemba website.

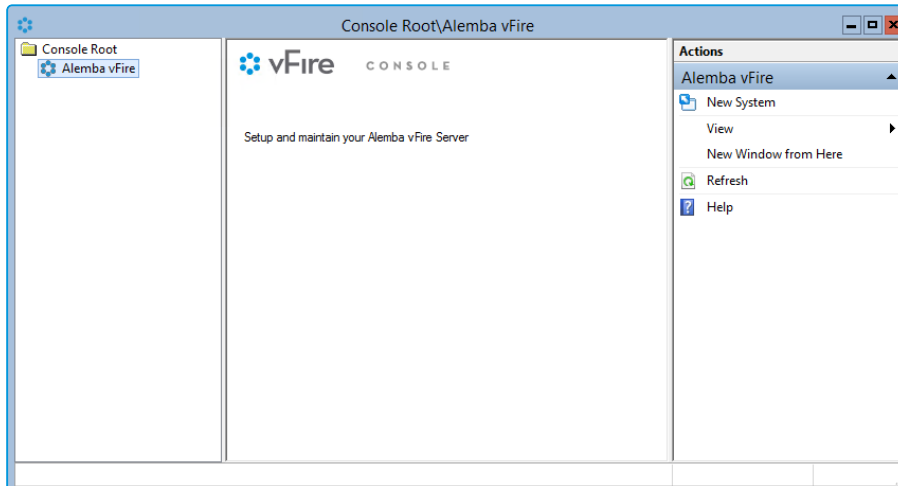


Oracle databases are not supported for vFire 9.9 and above.

1. Access the Server Console, as described on [page 8](#).



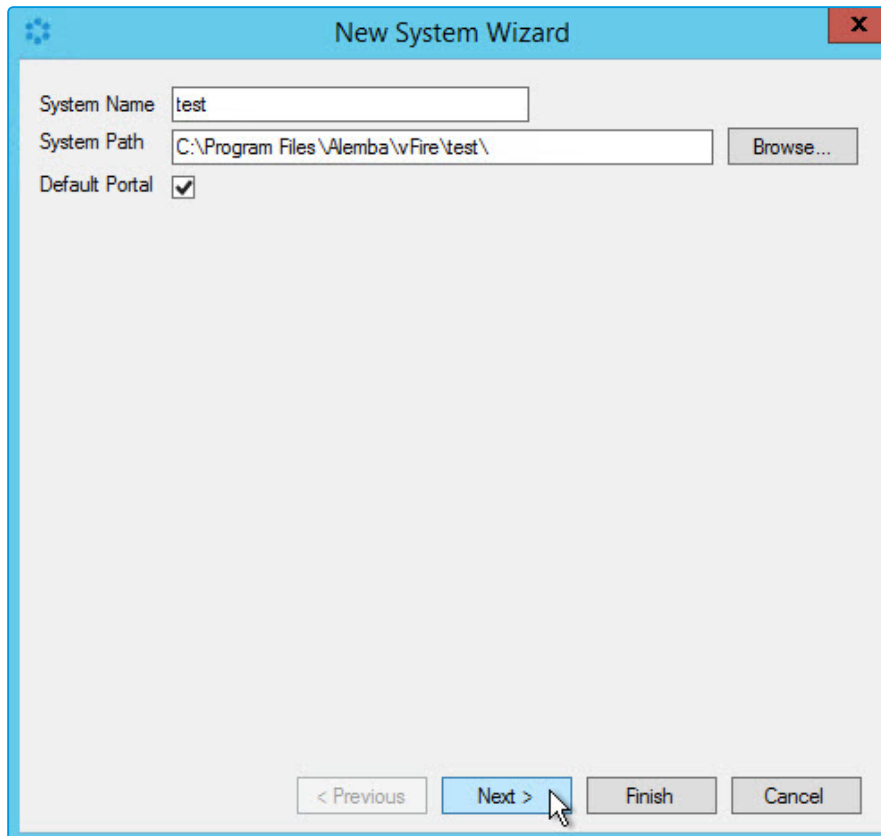
2. In the left pane, under **Console Root**, expand the tree view out if necessary to see **Alemba vFire**. Select it and then select **New System** from the right hand pane. (Alternatively, you can right click on Alemba vFire and select New System from the contextual menu.)



3. The **General** window in the New System Wizard is displayed in which you can specify the General System Properties.



If you are configuring an existing system, select the system in the server console window and under **System Setup**, select **Properties**. Ensure that the **General** tab is uppermost.



System Name Type a name for the system. You can choose any name you like. Each system name must begin with a letter, not a number. By default, the system name is System1.



Do not use double quote characters. Spaces, commas, semi-colons and single quotes can be used.

System Path Choose a name for the folder (under the Alemba vFire folder) where the system and its subfolders are to be stored. By default, the system directory name is the same as the system name, though you can edit it. The system directory name must be all ASCII characters.



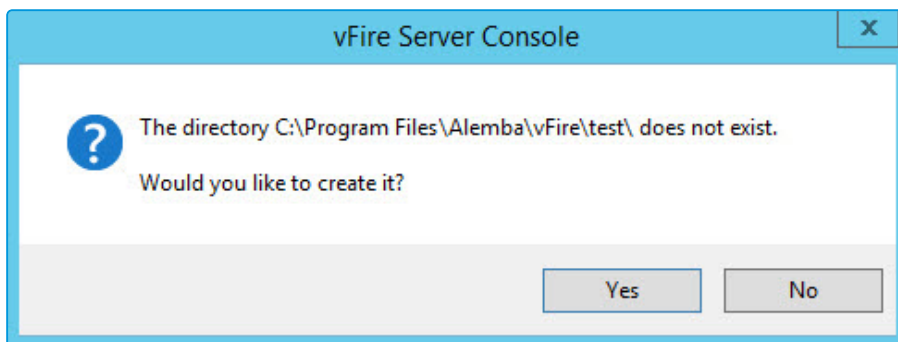
You can specify a path that does not exist. You will be prompted to create it when you select **Next**.

Default Self Service Portal Select to make this vFire system the default system used from this server.

4. Click **Next**.



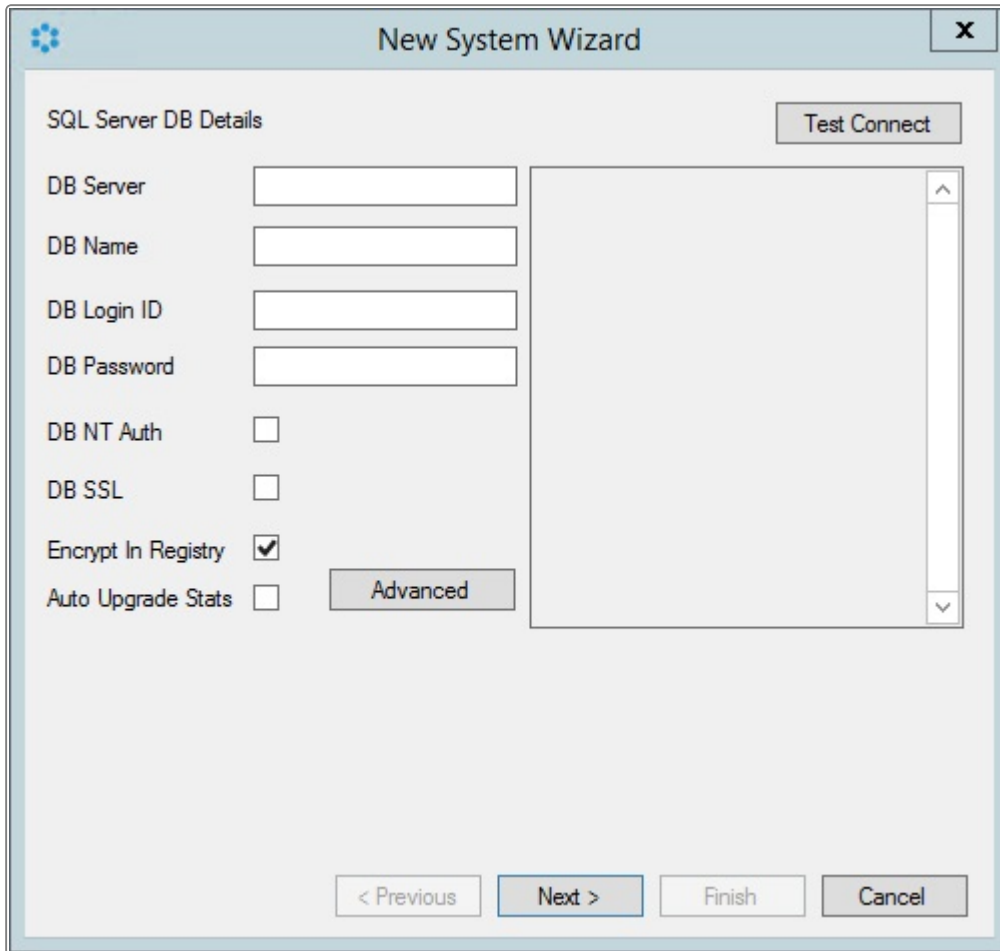
5. If a folder with this name does not exist, the Server Console prompts you to confirm that you want to create this system.



6. Select **Yes** to proceed, or **No** to cancel this operation. Selecting **Yes** will start the server console copying system files and templates required for creating the vFire Core system.
7. The **Database** window appears, in which you can specify the Database Properties.



If you are configuring an existing system, select the system in the server console window and under **System Setup**, select **Properties**. Then select the **Database** tab.



9. You can now configure the vFire Core database.

DB System Select a database type (SQL Server or Oracle) from the drop-down list. This is the actual database engine type. Connection is done via ActiveX Data Objects (ADO.NET). The default is SQL Server.

DB Server If you are configuring an SQL Server, type the name of the server on which the database exists.
 If you are configuring an Oracle Server, type the name of the Oracle connection string. The name you enter should be the TNS alias name that has been configured in the Oracle client software when connecting to the Oracle database.

DB Name Type the name of the database.

**DB Login ID**

If you are **not** using NT authentication, enter the DB Login ID provided by your database administrator. For SQL Server databases, the default DB Login ID is "sa".



This is the login for the database, not for vFire Core. The account defined when creating this system should be a member of the System Administrator role.

For Oracle databases, you will need to type the Login ID and Password for the vFire Core table space.

DB Password

If you are **not** using NT authentication, enter the DB Password provided by your database administrator.

DB NT Auth

This applies to SQL Server types only.

Select to authenticate the database login against the user's network login. Admins logging into the database must use NT Authentication details (i.e. the network login and password).



If you select **DB NT Auth**, the **DB Login ID** and **DB Password** fields are disabled because they are irrelevant. It is recommended that before you use this option, you review the implications with Alemba Support.



When upgrading the system to a newer version, the Upgrade MSI connects to the database using the account "NT AUTHORITY\SYSTEM" and therefore this account must be granted "sysadmin" permissions to the database server, and "db_owner" permissions to the database.

DB SSL

This applies to SQL Server types only.

Select to enable SSL encrypted communication between the vFire Core and the database. For this option to work, SSL must be configured on the selected SQL Server.



This is a complex process. We recommend that you discuss it with your Account Manager before enabling it.



Encrypt in Registry

Encrypts the database login ID, password and connection string when these are stored in the registry. This offers additional database security, and is selected by default.



This option will encrypt the database password only, not the password for any vFire Core person record login IDs.

Auto Upgrade Stats



This applies to Oracle server types only.

Select to run the upgrade statistics processes when an upgrade, patch or custom SCP script is initiated.

The Oracle script DBMS_STATS is used to gather all table and index statistics. The default estimate percentage is 20%. This may be overridden through the Oracle Advanced Options.

If you wish to perform the statistic updates manually, clear this option.



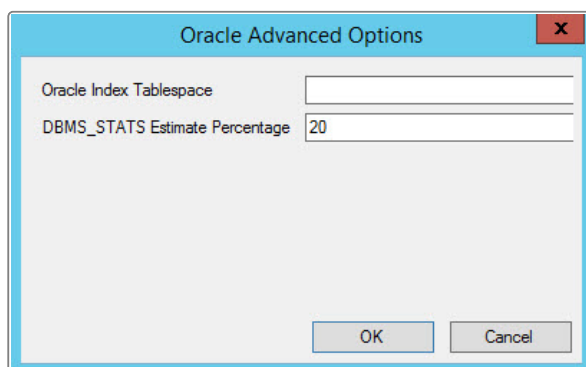
If you deselect **Auto Upgrade Stats**, Alemba recommends the database statistics are kept up to date manually to ensure vFire Core performs optimally.



Auto Upgrade Stats can also be set through the registry key DBAUTOSTATS.

10. Select **Advanced** if you want to set additional advanced Oracle and SQL database settings. The options displayed will depend on whether your system is configured for Oracle or SQL.

Oracle Advanced Options

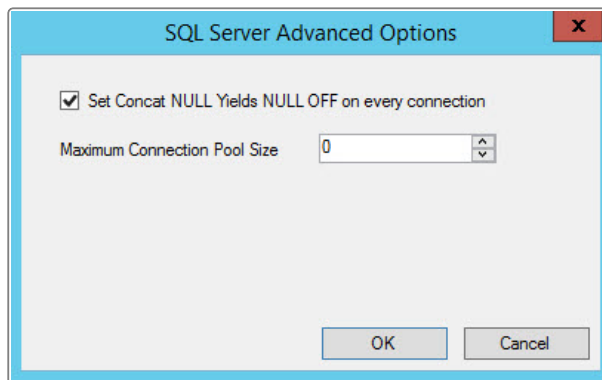




Oracle Index Tablespace Specify a secondary or alternative Oracle table space for creating indexes

DBMS_STATS Estimate Percentage Define the estimate percentage (the default is 20 percent) for the Oracle script DBMS_STATS to gather all table and index statistics

SQL Server Advanced Options



Set Concat NULL Yields NULL OFF

This setting allows SQL statements to return data. It can be configured at the session-level or the database level. Because the default configuration at the database level is ON, this box should be checked to override the database-level configuration where SQL statements are to return data. It should only be unchecked if the database has been configured such that Concat NULL Yields is off (for example, to improve performance).

Maximum Connection Pool Size

The size of the client connection pool. The default number of connections is 100, and this is represented by the value '0'. Key in any other value manually.



If the limit is exceeded, errors will occur and as such will be recorded in the event log.

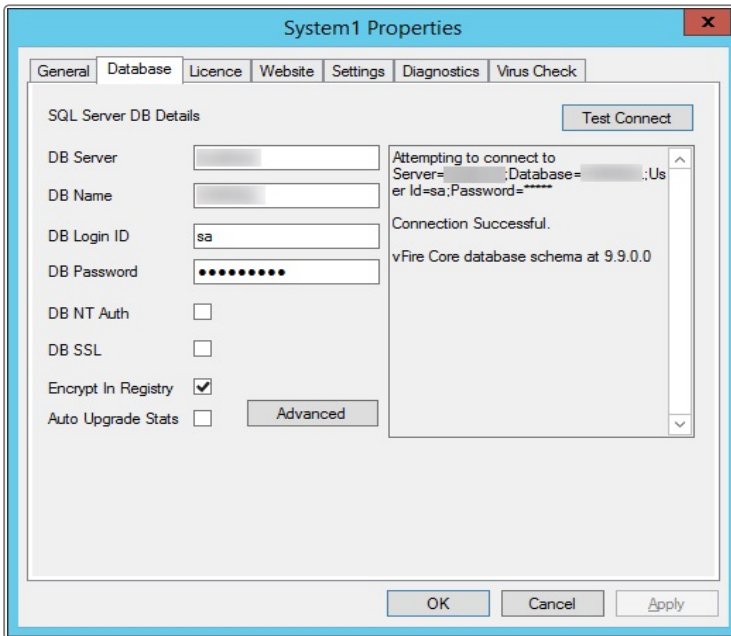
Select **OK** to apply the advanced options or **Cancel** to close the advanced options without saving your changes.

11. Select **Test Connect** to test the connectivity of the server and the information entered.

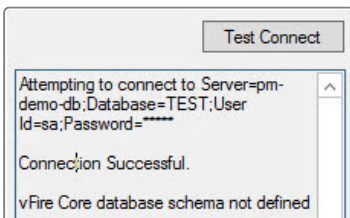


- If all checks are successful, "Connection Successful" is displayed in the text field below the **Test Connect** button. If not, a detailed error message will be displayed that will help you diagnose the problem with the connection.


The following message is displayed if you are using an existing database:



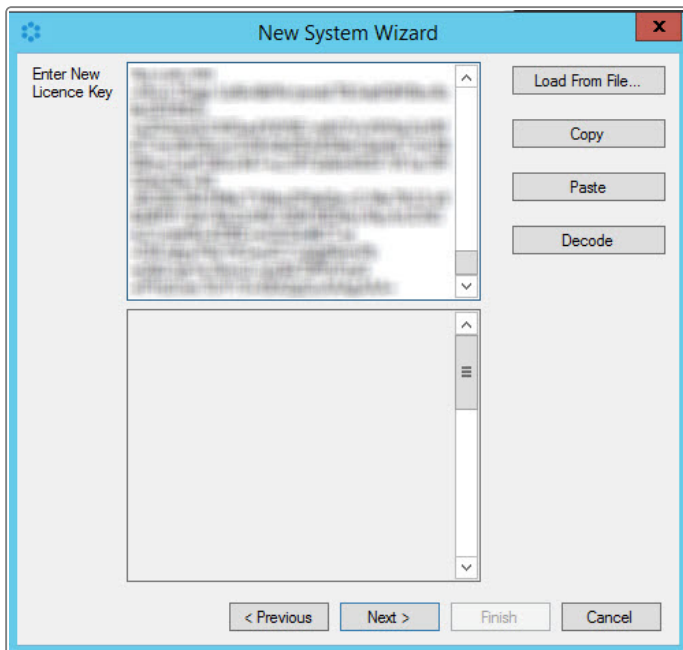
If you are using a blank database, you will also see the message "vFire Core database schema not defined".



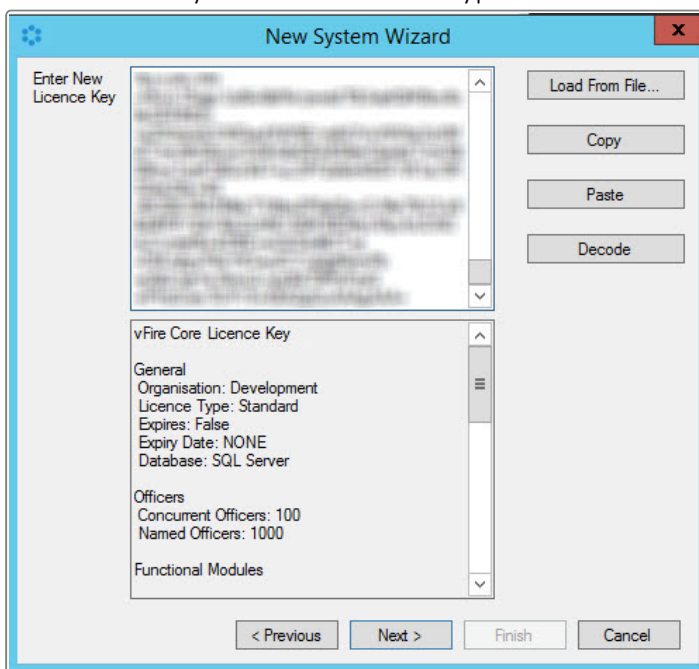
- Click **Next** to continue.
- The next window appears, in which you can specify the License Properties.


 If you are configuring an existing system, select the system in the server console window and under **System Setup**, select **Properties**. Then select the **Licence** tab.

- Enter the licence key in the **Enter New Licence Key** field.



17. The licence key is shown in an encrypted form. Select **Decode** to see the details.

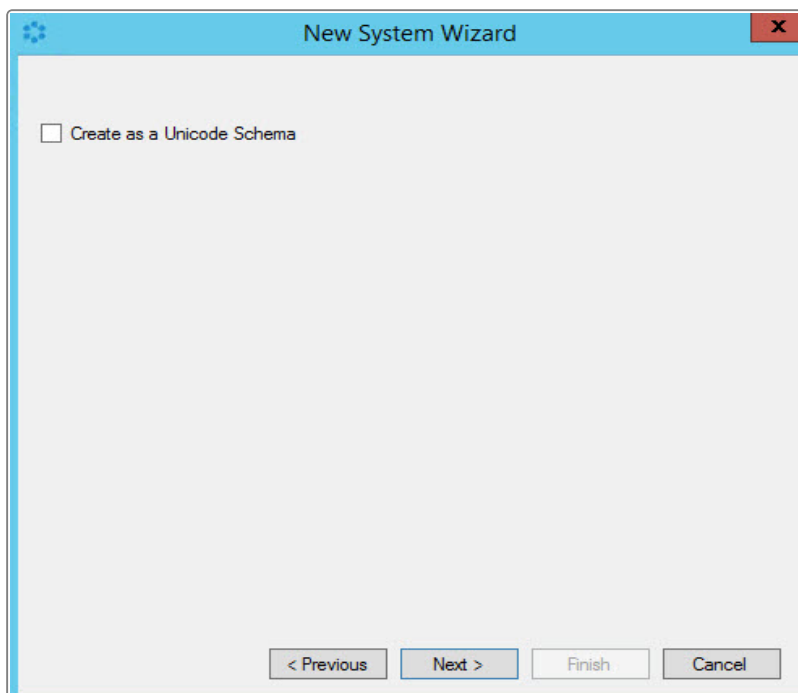


 Licences control the number of analysts that can access the system. You can increase the number of analysts on your licence by contacting your Alemba Account Manager.

18. Select **Next** to continue.



19. The Unicode window appears if using a SQL server.



20. If you are using a multi-language database, you can specify this system as pointing to a Unicode database, and choose the default language for this particular system (it is possible to have multiple systems pointing to the one database, each with a different default language). Unicode databases can use a greatly extended character set and can display multiple languages on the same window. However, the databases need to be properly configured to take advantage of Unicode's features.

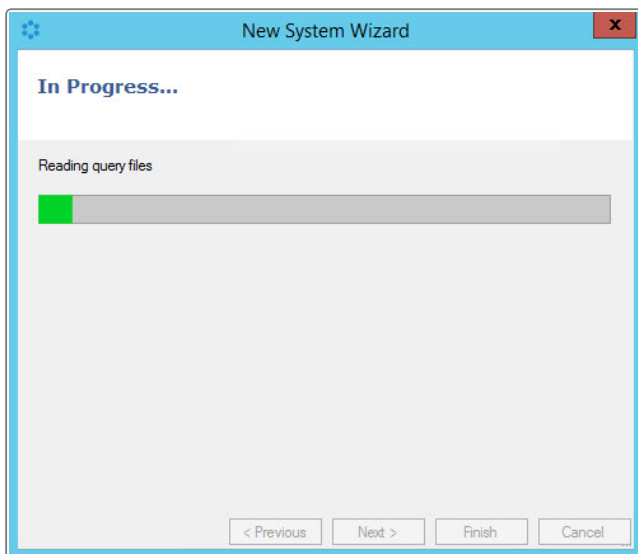
Alemba recommends you **do not** select the **Create as a Unicode Schema** without consulting Alemba Professional Services. If your database is required to support multiple languages or character sets, **Create as a Unicode Schema** should be enabled when the database is empty. Existing databases that do not support Unicode can be upgraded to support Unicode, but this is a complex process that requires specialist consulting work.

If you are creating an **Oracle** database, the option **Create as a Unicode Scheme** option is selected by default and disabled in this screen. This is because vFire Core allows you to create only Unicode Oracle databases.

21. Select **Next** to continue.



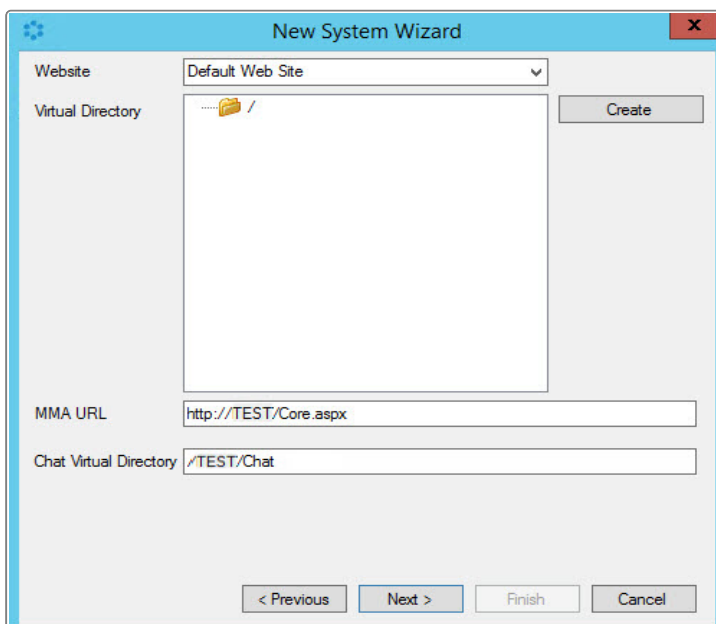
22. The Server Console starts creating the vFire Core database using the settings you specified. This may take several minutes.



23. When it is complete, the **Website** window appears. Here you can specify the Website Properties.



If you are configuring an existing system, select the system in the server console window and under **System Setup**, select **Properties**. Then select the **Website** tab.





24. Here you can identify the virtual directory you want to use, and the default URL for MMA. You can choose an existing virtual directory, or create a new one. The fields are completed as follows:

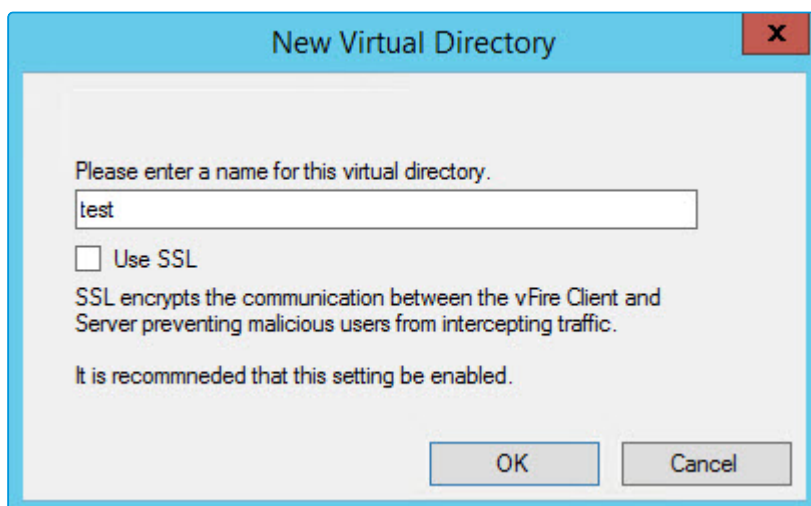
Website Default Web Site is selected. This is the website under which vFire Core will run.

Virtual Directory The directory created in Internet Information Server (IIS), which points to the physical location of vFire Core files. At system creation this is blank and a new virtual directory **must** be created.

25. To create a virtual directory for this system, select **Create**.

• If you do not do this, you can continue to create your system, but you will need to add a website before completing the configuration in order to avoid errors.

26. The **New Virtual Directory** popup window is displayed.



Type the name of the virtual directory you want to create, and select/deselect **Use SSL**. Then select **OK**.

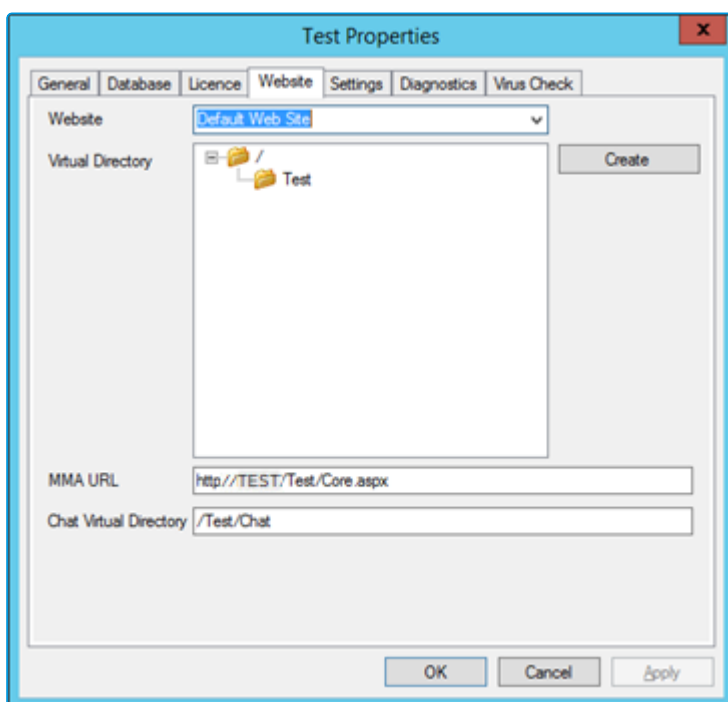
• When we use the term SSL in vFire, we are actually referring to encryption protocols supported by IIS. This security is configured in IIS and vFire will work with any protocol supported by the client and/or server.

• When you create a new virtual directory, vFire Core will also create a new application pool in IIS.



Ensure that your virtual directory is configured correctly, as otherwise you will have difficulties with running and upgrading your system, and using Chat. This is particularly important if you have multiple systems.

27. The **Chat Virtual Directory** will default to being within the chosen virtual directory for the system, and you are advised to leave the default unless you specifically need to change it.
28. **MMA URL** displays the default URL for Mail Message Access (MMA) messages, in the form **http://machinename/Virtual Directory/Core.aspx**. The URL for MMA points to the current server by default. You may choose to change it to a different virtual directory, or to a different URL on another server, or to a load balancer.



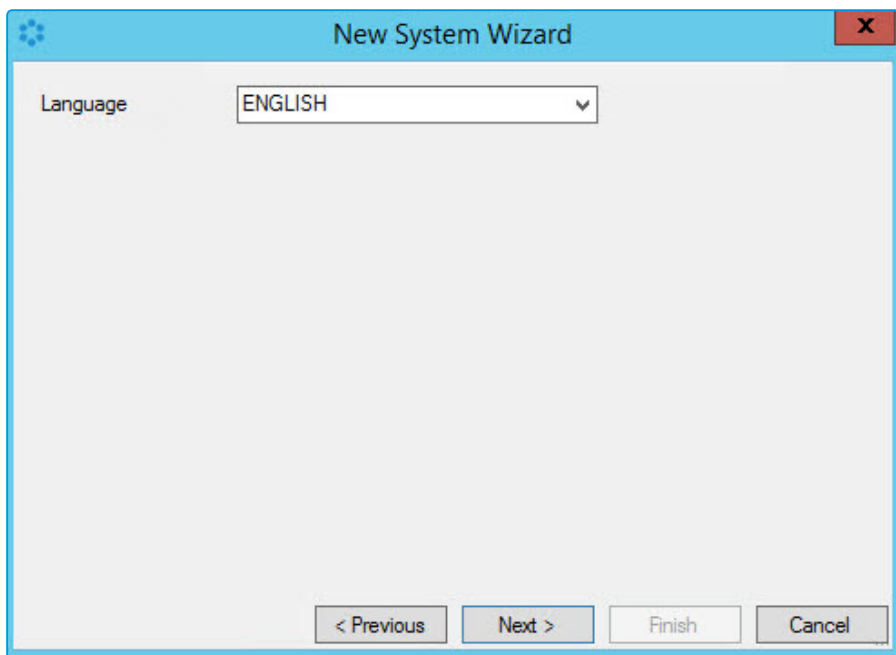
If you choose to **Use SSL**, be sure to start the address with **https** when logging in.



If you are using a qualified domain name for the Self Service Portal, you should specify the qualified domain name in the MMA URL field. This way, all the pages on the Self Service Portal will use the qualified domain name, rather than the name of the server/virtual directory.



29. Select **Next**.



30. The default and currently only language available is English, so select **Next**.
31. The Server Console updates the database. Once all the files are copied and your system has been configured, the process is complete.



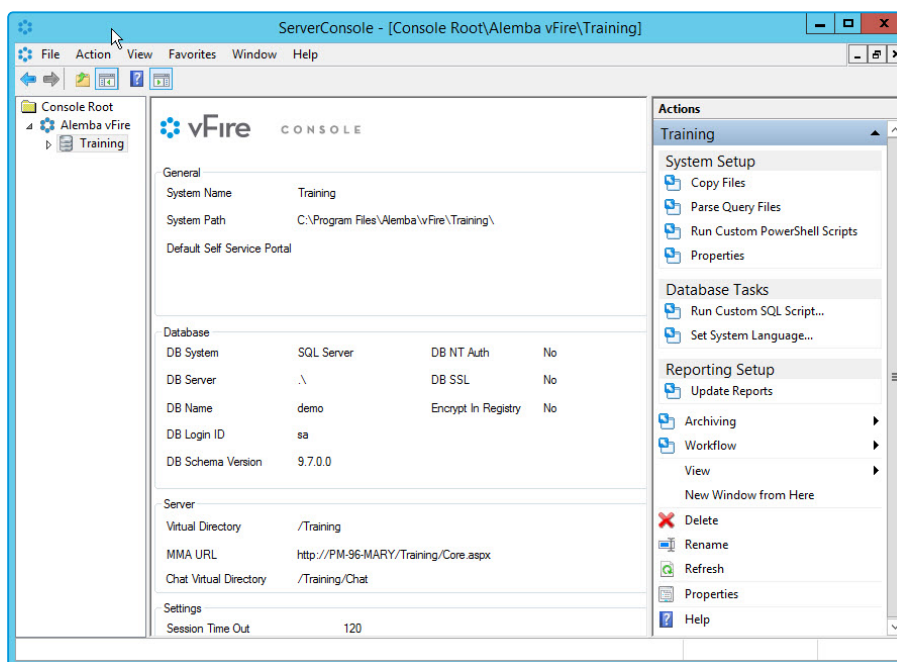
You can make changes to the system properties and configure it further following the instructions on [Configuring the Server](#).



Configuring Your System

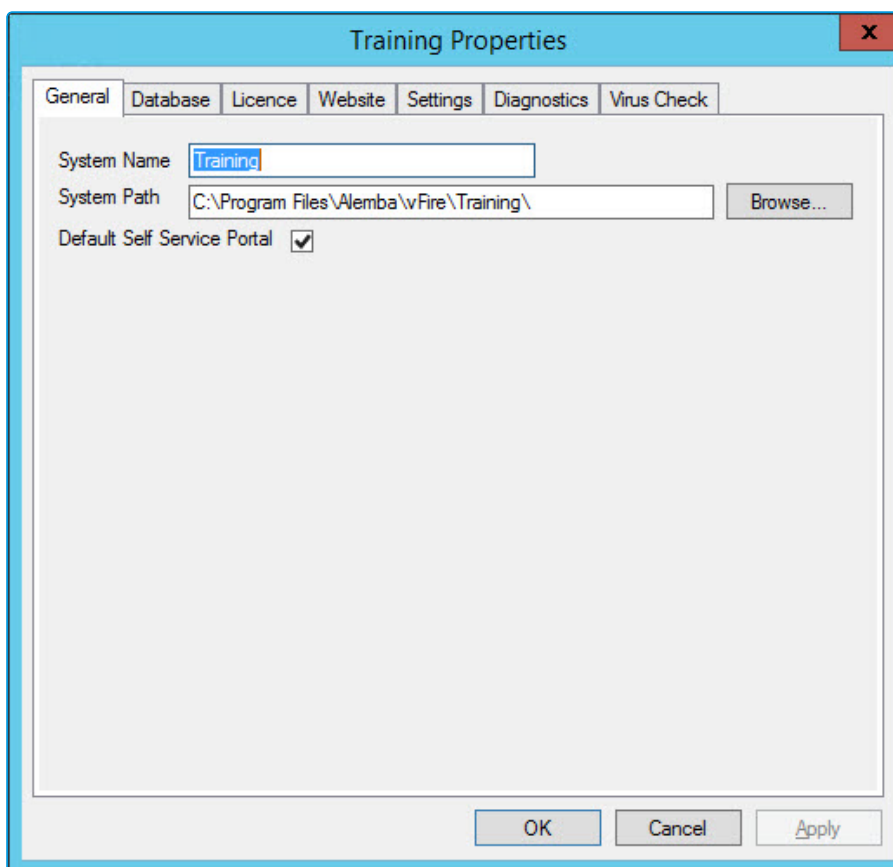
Once you have created your server console, you can configure and update the system properties.

1. From the left window pane, select the system you want to examine.





- In the right window pane, under **System Setup**, select **Properties**. This displays the **Properties** window, with a selection of tabs relating to different system settings.



- Select the appropriate tab to update the details, referring to the relevant section in this document:

General	To configure general system properties	page 10
Database	To update database properties	page 12
License	To view or update the license details	page 17
Website	To update website properties	page 20
Settings	To update your system settings	page 27
Diagnostics	To update the system diagnostics settings	page 31
Virus Check	To add a virus checking application	page 33



After changing the system properties, you must apply the settings by following these steps:

1. Select **Apply** and **OK** to close the system properties.
2. Exit the Server Console. A dialog box is displayed asking you if you want to save the vFire Core Server Console settings. Select **Yes** to save your settings and exit the Server Console.



On exiting the Server Console, the cache on the application server is automatically cleared and refreshed. This may cause some slight performance delays.

3. Restart the polling and IIS services.



Configuring System Settings

The **Settings** tab displays the session timeout and server date format for the system. To configure these settings, use the following procedure:

1. Access the **Properties** window, as described on [page 24](#).
2. Select the **Settings** tab.

The screenshot shows the 'Training Properties' dialog box with the 'Settings' tab selected. The dialog has a title bar with a close button (X) and a tabbed interface with the following tabs: General, Database, Licence, Website, Settings (selected), Diagnostics, and Virus Check. The 'Settings' tab contains the following fields and controls:

Session Time Out	<input type="text" value="120"/>
Self Service Portal Session Time Out	<input type="text" value="120"/>
Server Date Format	<input type="text" value="dd/MM/yyyy HH:mm"/>
Sample	16/01/2017 15:53
Currency Symbol	<input type="text" value="£"/>
Self Service Portal Security Cookie	<input type="checkbox"/>
Reporting Font Character Set	<input type="text" value="Default"/> ▼
Report Font Name	<input type="text" value="Default"/> ▼


At the bottom of the dialog are three buttons: OK, Cancel, and Apply.


3. Complete the details.


**Session Time Out**

The server holds an idle session open with each client browser. There is an idle time limit placed on each session before the connection times out. By default this is set to 120 minutes. There is no maximum time limit.

The system timeout applies to both named and concurrent analysts who are logged into the system and idle. Named analysts are included in system timeouts so that lost sessions don't get held open, leaving calls in a locked state.


 You can disable the session time out by setting the time to zero. However, we do not recommend that you do so as this can lead to calls being left open for an extended period of time and may lead to performance issues.

 You can specify a particular session timeout for license corrals, if you have configured these. This is done within the System Administration settings in vFire Core.

 You must restart the polling and IIS services for changes to session time out to take effect.

Self Service Portal Session Time Out

Specify a different time out (in minutes) if you want to set a different session timeout value for the Self Service Portal.

 You must restart the polling and IIS services for changes to the session time out to take effect.



Server Date Format Within the application, vFire Core uses the date format that is set on the analysts' client machine. However, there also needs to be a default date format set for each particular system for underlying processes within the application, such as the email polling service and report scheduler, which are not attached to a particular client. Setting the date format in the Server Console sets how these processes use dates.

The default date format is dd/MM/yyyy HH:mm, as shown in the **Sample**. You can format the date and time as follows:

dd	day
MM	month
yyyy	year
HH	hour
mm	minutes
tt	AM or PM

Currency Symbol Type the symbol for the currency used by your vFire Core system

Self Service Portal Security Cookie Select to enable a security check to prevent users from accessing another user's browser session. If this option is selected and a user attempts to access another session by copying the URL for that session to another browser, the following error message is displayed, "Invalid Security Cookie"

Reporting Font Character Set Select a character set from the drop-down list to use as the default character set in vFire Core Reports.

Report Font Name Select a font from the drop-down list to use as the default in vFire Core Reports.

After changing the system properties, you must apply the settings by following these steps:



1. Select **Apply** and **OK** to close the system properties.
2. Exit the Server Console. A dialog box is displayed asking you if you want to save the vFire Core Server Console settings. Select **Yes** to save your settings and exit the Server Console.



On exiting the Server Console, the cache on the application server is automatically cleared and refreshed. This may cause some slight performance delays.

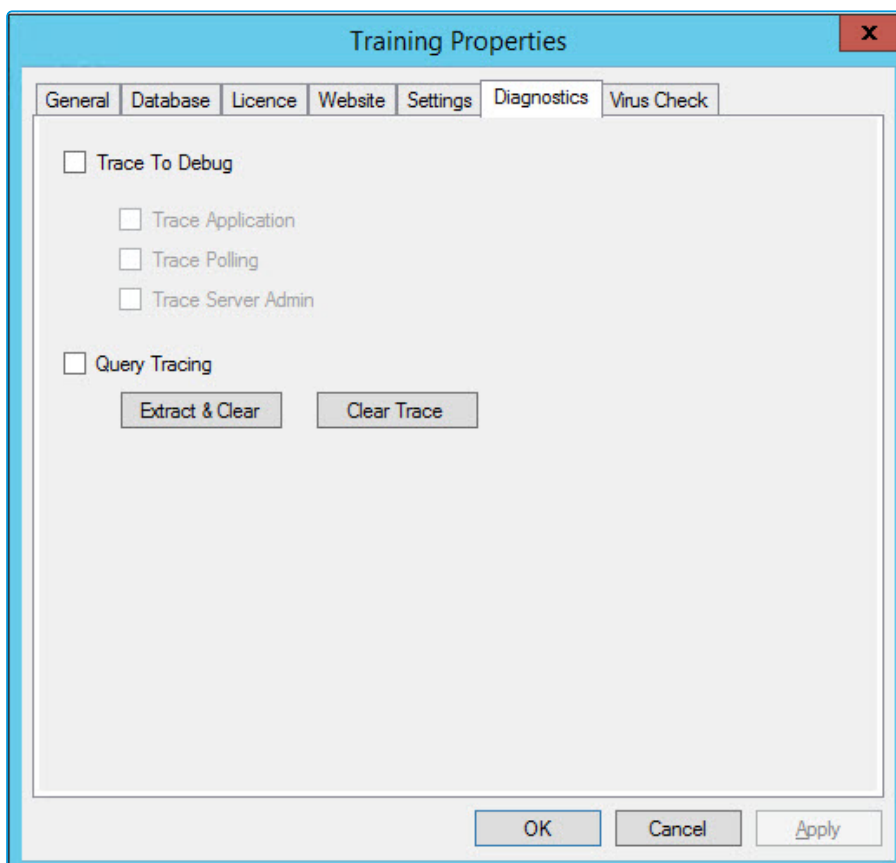
3. Restart the polling and IIS services.



Configuring Diagnostics Settings

The **Diagnostics** tab displays the system diagnostic settings. To configure these settings, use the following procedure:

1. Access the **Properties** window, as described on [page 24](#).
2. Select the **Diagnostics** tab.



3. Complete the details.

Trace to Debug	Select to enable diagnostics for this system
Trace Application	Select to trace all the actions performed by analysts in vFire Core. If selected, application trace information for this system will be sent to DBWin32 (or DBGView). If disabled, application trace information will not be recorded for this system.



Trace Polling Select to trace all the polling information for this system. If this option is selected, polling trace information for this system will be sent to DBWin32 (or DBGView). If it is disabled, polling trace information will not be recorded for this system.

Trace Server Admin Select to trace all the actions performed by a system administrator on the vFire Core system through the Server Console

Query Tracing Select to enable logging of every query run in the system. This includes details such as the analyst who ran the query, what query it was, how long it took to run, how many results returned and the SQL statement itself. This information is logged in a database table, referred to as the trace table.

Query Tracing also logs slow running queries as well as logging a warning to the Windows Events log and a row is added to the trace table.

4. Select **Extract & Clear** to extract all of the record queries into an XML file and place the file into the System/Diagnostics directory. Everything is then deleted from the trace table.



Extracting data from the table into XML format can be slow.

5. Select **Clear Trace** to delete everything from the trace table.

After changing the system properties, you must apply the settings by following these steps:

1. Select **Apply** and **OK** to close the system properties.
2. Exit the Server Console. A dialog box is displayed asking you if you want to save the vFire Core Server Console settings. Select **Yes** to save your settings and exit the Server Console.



On exiting the Server Console, the cache on the application server is automatically cleared and refreshed. This may cause some slight performance delays.

3. Restart the polling and IIS services.

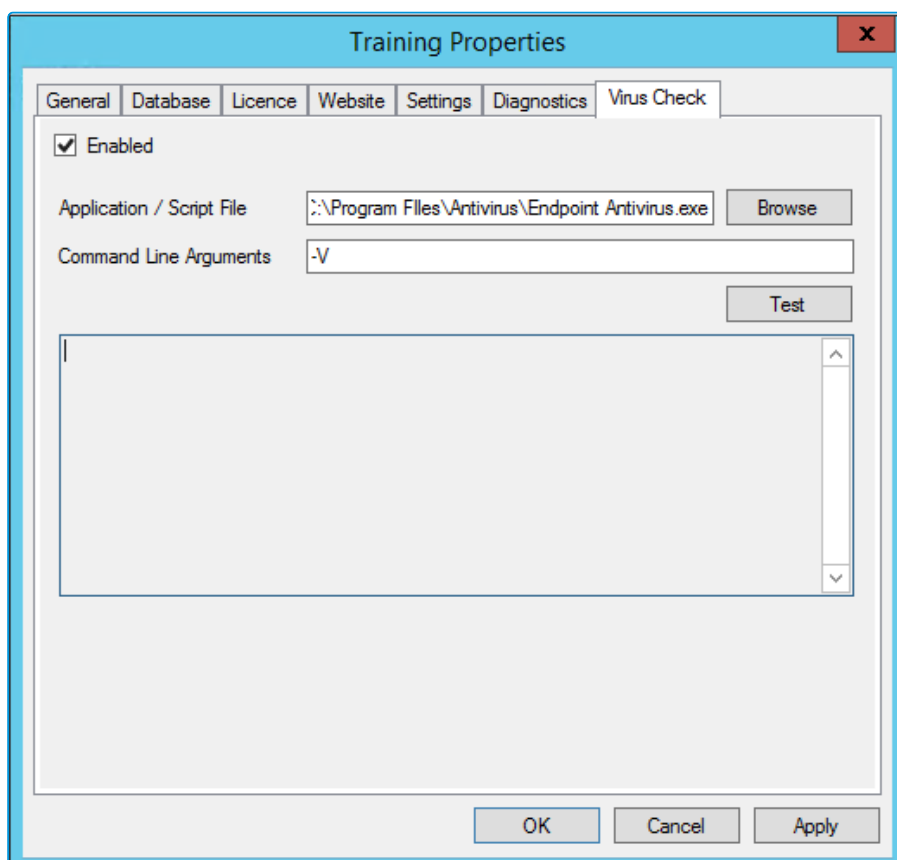


Configuring Virus Check Properties

The **Virus Check** tab displays the virus checking properties for this system. vFire Core can interface with a third-party virus checking application in order to scan files uploaded to vFire Core.

If you have defined a virus checker in the Server Console, then whenever someone attempts to upload a file in vFire Core, the following steps occur.

- The file is copied into a temporary location.
 - The virus checker application specified is run against the uploaded file.
 - It is assumed that if it finds a virus, will remove any virus if it is capable of doing so, and will delete any file with an unknown or irremovable virus.
 - If vFire Core finds the file in the temporary location, it will assume the file is clean.
 - If vFire Core finds the file has been deleted from the temporary location, it will assume the file was infected.
1. Access the **Properties** window, as described on [page 24](#).
 2. Select the **Virus Check** tab.





3. Complete the details.

Enabled	Select to turn on virus checking and thus subsequently enable the other fields on this tab
Application/Script File	Select Browse to locate a virus checking application. Use the Open File dialog box to locate an application file (such as an .EXE or .BAT file) to use as your virus checker.
Command Line Arguments	If you need to pass any parameters to the virus checking application, type them into this field. Check the documentation for your virus checker for more information on the required command line parameters. vFire Core will run the virus checker in the following way: [Virus checker path] [target file] [command line parameters]

4. Select **Test** to test the virus checking functionality. The vFire Core Server Console will attempt to create the virus checking directory and run the application you have specified.

After changing the system properties, you must apply the settings by following these steps:

1. Select **Apply** and **OK** to close the system properties.
2. Exit the Server Console. A dialog box is displayed asking you if you want to save the vFire Core Server Console settings. Select **Yes** to save your settings and exit the Server Console.



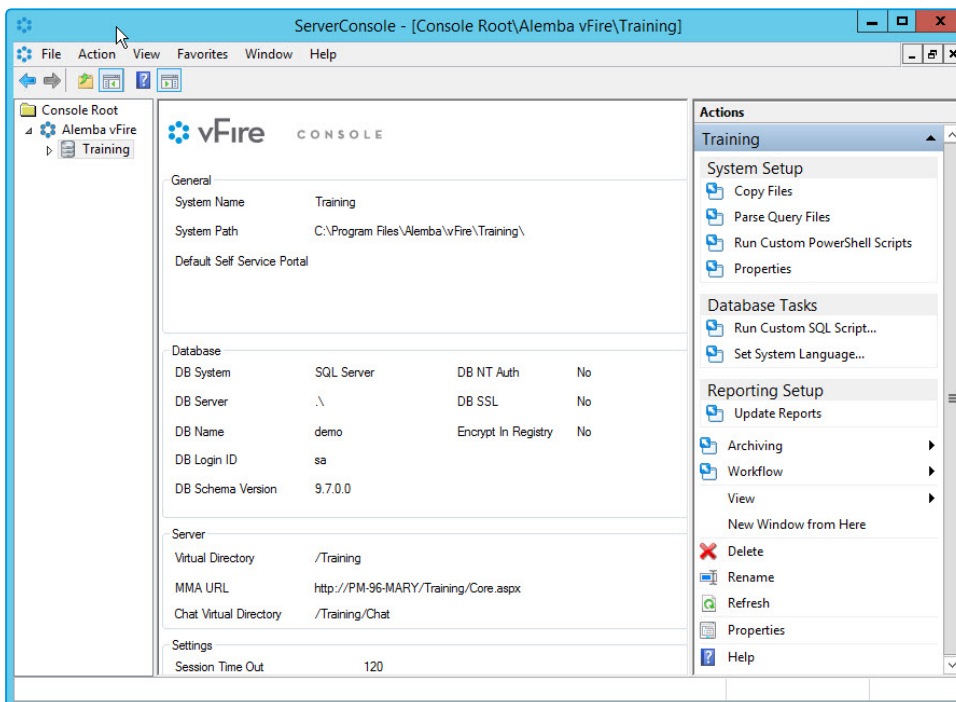
On exiting the Server Console, the cache on the application server is automatically cleared and refreshed. This may cause some slight performance delays.

3. Restart the polling and IIS services.



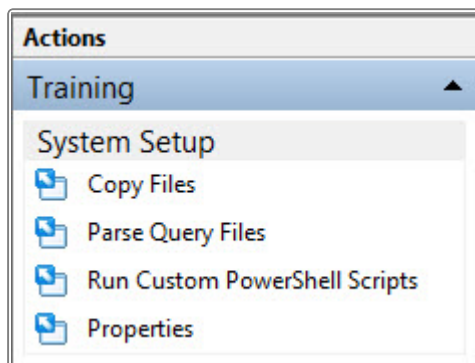
Server Console System Tasks

A range of tasks can be performed within the Server Console. These can be accessed from the **Actions** pane to the right of the server console window. Tasks are grouped by functional area (that is, System Setup, Database Tasks, Reporting Setup, and so on).







System Setup Tasks




Copying Files

The  **Copy Files** task enables you to create a system directory structure. It copies the files from the original directory to the new directory structure.

 This task may overwrite customized files. You should only undertake this task following consultation with Alemba.

Parsing Query Files

The  **Parse Query Files** task parses a custom query file if you do the following:

- Create a custom query file
- Change config-queries.xml
- Change an existing custom query file

You must run this command to parse the updated query file. This process will create a parsed .SQP file in the queries folder for that vFire Core system (this is a binary file and cannot be read or edited in a text editor).

This task:

- Identifies the query files and the order in which they are used by the system;
- Fetches information about the database schema to enforce correct parameter lengths in the queries;
- Writes the queries into a format that is quick to read by the application.




You should parse the query files after any change to a query file, config-queries.xml, or the database schema.

Running Custom PowerShell Scripts

You can use this option to manually run the PowerShell scripts required to use the Alemba API. When you select the option, the script will be automatically selected and you simply need to run it.

Configuring System Properties

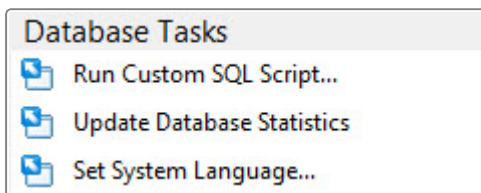
The  **Properties** task displays the System Properties for your vFire Core system; where you can specify a new system name, path, or configure your database connection.



For more information on configuring the system properties, see **Configuring Your System** on [page 24](#).



Database Tasks



Upgrading the vFire Core Database

The **Patch Database** task updates a database from a previous version of vFire Core. The database schema and default data is brought up to date with the latest version of vFire Core. (This only appears if your database details need upgrading.)

Running a Custom SQL Script

The **Run Custom SQL Script** task allows you to run a specified custom upgrade script on a system.

Like the custom query files (which follow the naming convention QUERIES-*.SQL), it is possible to have a custom database upgrade script that can add new tables, indices, stored procedures, triggers and rows to a database, as well as override and replace existing ones.

To run custom upgrade scripts, follow these steps:

1. Define all custom procedures, triggers etc. by adding them to a file called CUSTOM_UPDATE.SCP.
2. After saving your custom script file in the config directory, select **Run Custom SQL Script** from the **Actions** pane.
3. The **File Open** dialog box in the system's config directory is displayed, with a file selected called CUSTOM_UPDATE.SCP.


You can select any file with a .SCP extension, and as of 9.2.1 .XML extension, from any source, though it is recommended you use the default file. The Server Console will then run the script much like it runs the Update script.



This file is not removed when the system is upgraded.




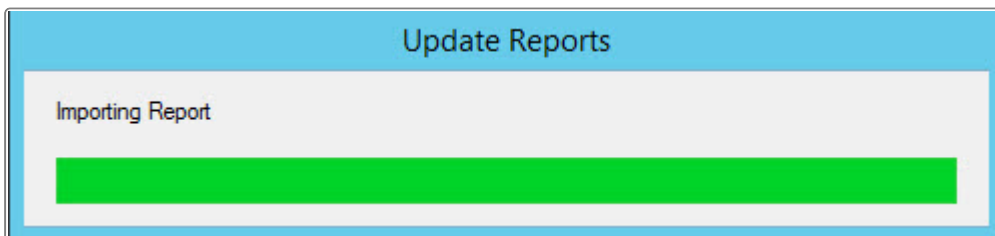
Updating the Database Statistics (Oracle only)

Select the  **Update Database Statistics** task to upgrade the database statistics, which will optimize the performance of the database.

Reporting Setup Tasks

Updating Reports

The  **Update Reports** task under **Reporting Setup** refreshes all reports with the base version of a report.



If a report has been altered, the changes will be overwritten with the base version of the report when this option is run. Any new reports created are not overwritten. For more information on creating reports, based on existing reports, see the **Report Designer Guide**.



Archiving

Archiving moves call detail and call history data out of the Call Logging and Call History tables to Archive tables, providing the advantages of increasing speed and improving performance by reducing the size of the Call Logging and Call History tables. When an Analyst is performing a call search, they can check the Archived option to search against calls in the archived table.

Other data linked to the archived calls, and the link data itself is deleted, freeing up space and reducing the size of the database.

When a call is archived, the following happens:

- All items within the CL_CALL_LOGGING database table which holds the Call Details are moved to the table ARCHIVE_CALL_LOGGING.
- All items within the CL_PROBLEM_HISTORY database table which holds the Call History are moved to the table ARCHIVE_PROBLEM_HISTORY.
- Any calls and knowledge entries linked to the archived call are unlinked.
- All other items linked to the archived call are deleted.
- Links to archived calls are removed from non-archived entities.



Before you start

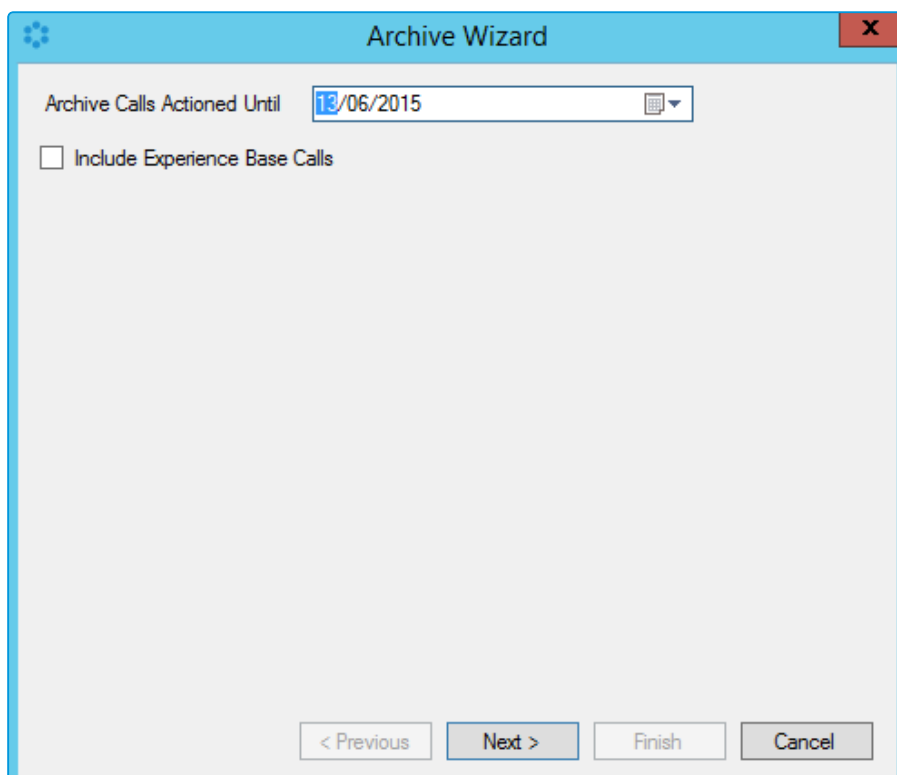
It is recommended that you perform archiving outside of peak hours for database usage, as it is quite a resource-intensive task (especially for a large database). Furthermore, if Analysts are taking action on a call during the archive process, an error may be generated through the archiving process. If you do receive an error during the archiving process, you should perform the archive again.

Note that once calls have been archived, they cannot be moved back to the standard tables (unless this is done manually through SQL commands).

1. Select the  **Archiving** option beneath the **Reporting Setup** group.



- From the pop-up menu, select **Archive Calls...** The Archive Wizard window is displayed.



- Complete the details.

Archive Calls Actioned Until Select an end date for closed calls that you want to archive. All closed calls prior to this date will be archived. The actual date used by the archiving process is **Time Last Actioned**.

Include Experience Base Calls Select to also archive calls that have been selected for the Experience Base.



This option is unselected by default, since it is assumed that administrators would want to keep Experience Base calls separate from the archiving process.

- Select **Next**. The archiving process will start. This may take a few minutes.
- After the archiving is complete, the **Archive Calls** window confirms the success or failure of the archive process. To view the log file of the results, select **View Log File**.
- Select **Finish** to close the **Archive Calls** window.



If you receive an error during the archiving process, you should perform the archive again.



Workflow Tasks

You can export workflow templates within vFire Core out of a system and into another system. This is particularly useful for transferring workflow templates from a test system to a production system, or when best practice templates have been provided by Alemba.

When importing workflow templates, Alemba strongly recommends that the source and target vFire Core systems have the same configuration settings. This is especially important when importing workflow templates that are partitioned. To ensure the templates are ported to the correct partition, the systems must have the same partition settings configured within System Administration in the main application.



There is more information about Service Workflow Template Portability in the [Workflow Template Portability Guide](#).

View Tasks

You can change the display of information in the Server Console by selecting the relevant option (that is, Add/Remove Columns, Large Icons, Small Icons, List, Detail, or Customize) from the **View** menu on the **Actions** pane.

Other Tasks

Systems can also be deleted, renamed and refreshed by selecting the relevant option, (that is **Delete**, **Rename**, **Refresh**) on the **Actions** pane.



Further Information

Product Information and Online Support

For information about Alemba products, licensing and services, visit www.alemba.com.

For release notes and software updates, go to www.alemba.help.

Up-to-date product documentation, training materials and videos can be found at www.alemba.help/help.



You may need to register to access some of these details.

Technical Support

For technical support, please visit: www.alemba.com and select the **vfire support** link. You will need to log in to the alemba self service portal to contact the Alemba Service Desk.

Comments and Feedback

If you have any comments or feedback on this documentation, submit it to info@alembagroup.com.