caseware™

IDEA App PMX

Version 2.0

The new version of the IDEA app PMX contains **important adjustments and optimizations**, including an update of the **Process Mining environment** for communicating with Celonis®.

Below you will find a brief overview of all new features to help you get started with the current version.

Importing the IDEA App PMX Version 2.0

Easy and fast import of the current version

The new version of the IDEA app PMX is a full version. This version can be used for new installations as well as for an update of an already existing version. If you have already imported the previous app version 1.2, you can simply import the new version over the existing one.

> **! Note:**
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> As the Python environment used to communicate with the Celonis® engine is shipped with the IDEA app PMX, it is required that you first import the IDEA app PMX to be able to work with the IDEA app Process Mining P2P or Process Mining O2C.

There are two ways to import the new app to IDEA.

Double click the app to import it:

1. Open the "IDEA_App_PMX_V2.0_EN" folder from the download package and double-click the DPACK file.

> **!** **Note:**
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> Start the import by double-clicking the DPACK file only on the computer on which IDEA 11.2 or higher is also installed.

2. The **SmartAnalyzer App Import** dialog box opens, showing the status of the import. The successful import process is displayed accordingly. As soon as this process is completed, the dialog box is automatically closed or you can exit the dialog box using the **Close** button. You can now work with the app.

Import the app via the **App Management** wizard.

1. Open IDEA and switch to the **SmartAnalyzer** tab.

2. From the **Apps** group of the ribbon, click **Management**. The **App Management** wizard opens.

3. Go to **Apps** and click the **Import apps** entry. The **Import Apps** page opens.

4. Select the DPACK file via the **Browse** button and click the **Start Import Process** button.

5. A message indicates that the import process has been completed. Close the **App Management** wizard. You can now work with the app.

A detailed overview of the system requirements for the current IDEA app PMX can be found in the "System_ Requirements_IDEA_ App_PMX_V2.0.pdf" file. The information about upgrading to the current version is included in the "Installation_Guide_IDEA_ App_PMX_V2.0.pdf" file. Both files are in the download package of the app.

New Features and Enhancements in Version 2.0

Update of the Python interface

As part of the app update, the Python libraries have also been updated. To install the current version of the configuration elements, click the **Process Mining Configuration** entry in the workflow of the IDEA app PMX. In the dialog of the same name, select the **General Settings** tab and click the **Install** button.

This step is always necessary, even if you have not worked with the previous app version.

> **!** **Note:**
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> If you have already used the previous version of the IDEA app PMX, it is strongly recommended that you **create a new IDEA project** after importing the current version and **re-import the data** before continuing to work with the app.
>
> In the Cloud version, analyses that you create with the new app can now be found under the entry **Caseware Process Mining**. Existing analyses that were created with previous app versions will remain under the entry **Audicon Process Mining**.

New proxy server settings

You now have the option of defining a proxy server in the **Process Mining Configuration** dialog on the **Cloud Service Settings (IBC)** tab.

This functionality offers you an increased level of **data protection and security** and allows you to meet the requirements of your company.

Known issue

In rare cases, unexpected behavior may occur if you close the **Configure Protocol of Activities** dialog without completing the configuration.

In this case, restart IDEA