

# Automation Anywhere Enterprise 10 LTS

## Installation Guide

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## 1 DOCUMENT PURPOSE

This document for Automation Anywhere Enterprise 10 LTS (Long Term Support) with product version 10.3 mentions the pre-requisites and provides a step by step guide to installing the Enterprise Control Room and Client.

## 2 AUTOMATION ANYWHERE ENTERPRISE CONTROL ROOM

### 2.1 PRE-REQUISITES

This section helps you determine whether your system has the proper hardware and software to install the Automation Anywhere Enterprise Control Room. Before installing the Enterprise Control Room, verify that your environment\* supports the requirements mentioned in the sections that follow.

*\* Applicable to physical as well as virtual deployment environment.*

### 2.2 SYSTEM REQUIREMENTS – EXPRESS AND CUSTOM STANDALONE INSTALLATION

*Applicable for Express and Custom-Standalone mode of installation.*

#### 2.2.1 Software Requirements

Operating System	Microsoft Windows 7.0 SP1 (Minimum) Microsoft Windows Server 2012 R2 (Recommended)
Web Server/IIS	Internet Information Services 7.5 onward
.NET Framework	Microsoft .Net 4.6
Data Management System	<b>For Express:</b> Microsoft SQL Server 2014 Express Service Pack 1 (SP1)
	<b>For Custom Standalone:</b> Microsoft SQL Server 2012 Express/Standard/Enterprise or higher

#### 2.2.2 Hardware Requirements

Processor	x64 Server Based CPU with Minimum 4 Core and Two Threads
RAM	8 GB
Disk Space	100 GB (Depends upon Repository size)



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[sales@automationanywhere.com](mailto:sales@automationanywhere.com)

## 2.3 SYSTEM REQUIREMENTS – DISTRIBUTED INSTALLATION

*Applicable for Custom-Distributed mode of installation*

### 2.3.1 Application Server - Software Requirements

Operating System	Microsoft Windows 7.0 SP1 (Minimum) Microsoft Windows Server 2012 R2 (Recommended)
Web Server/IIS	Internet Information Services 7.5 onward
.NET Framework	Microsoft .Net 4.6
Data Management System	Microsoft SQL Server 2012 Express/Standard/Enterprise or higher
Java Framework	JRE 1.6 onward

### 2.3.2 Application Server - Hardware Requirements

Processor	x64 Server Based CPU with Minimum 4 Core and Two Threads
RAM	8 GB
Disk Space	20 GB (Depends upon repository size)

### 2.3.3 Shared Data Server - Software Requirements

Operating System	Microsoft Windows Server 2012 R2 (Recommended)
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### 2.3.4 Shared Data Server - Hardware Requirements

Processor	x64 Server Based CPU with Minimum 4 Core and Two Threads
RAM	12 GB
Disk Space	100 GB (Depends upon repository size)
Shared Drive	-

## 2.4 SUPPORTED OPERATING SYSTEMS

Operating System	Edition
Microsoft Windows 10	Pro, Enterprise
Microsoft Windows Server 2012 R2	Standard, Datacenter
Microsoft Windows Server 2012	Standard, Datacenter



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email:  
[sales@automationanywhere.com](mailto:sales@automationanywhere.com)

Microsoft Windows 8.1	Pro, Enterprise
Microsoft Windows 8	Pro, Enterprise
Microsoft Windows Server 2008 R2	Standard
Microsoft Windows 7 SP1	Professional, Enterprise

## 2.5 INTERNET INFORMATION SERVICES

1. Internet Information Services 10.0 (for Windows 10)
2. Internet Information Services 8.5 (for Windows 8.1 & Windows Server 2012 R2).
3. Internet Information Services 8.0 (for Windows 8 & Windows Server 2012)
4. Internet Information Services 7.5 (for Windows 7 SP1 & Windows Server 2008 R2)
- Application Initialization Module for IIS 7.5 (for Windows 7 SP1)

## 2.6 VERSION CONTROL INTEGRATION (IF ENABLED)

1. Subversion\*:

\* *Subversion is provided by the Apache Subversion software project.*

- a. Subversion 1.8.13 and 1.8.14 with Visual SVN Server 3.3.x (Recommended)
- b. Subversion 1.7.2 with Visual SVN Server 2.5.2

**Note:** You can configure your own instance of Subversion; however, we recommend Visual SVN Server as the SVN Server for Subversion.

2. SVN repository with an Administrator account

## 2.7 ADDITIONAL FEATURES\*

\* *These can be enabled from Turn Windows feature on or off option*

**Note:** This section describes the steps required to enable the following features in **Windows Server 2012 R2**:

1. ASP .NET 4.5 or higher
2. .NET Extensibility 4.5

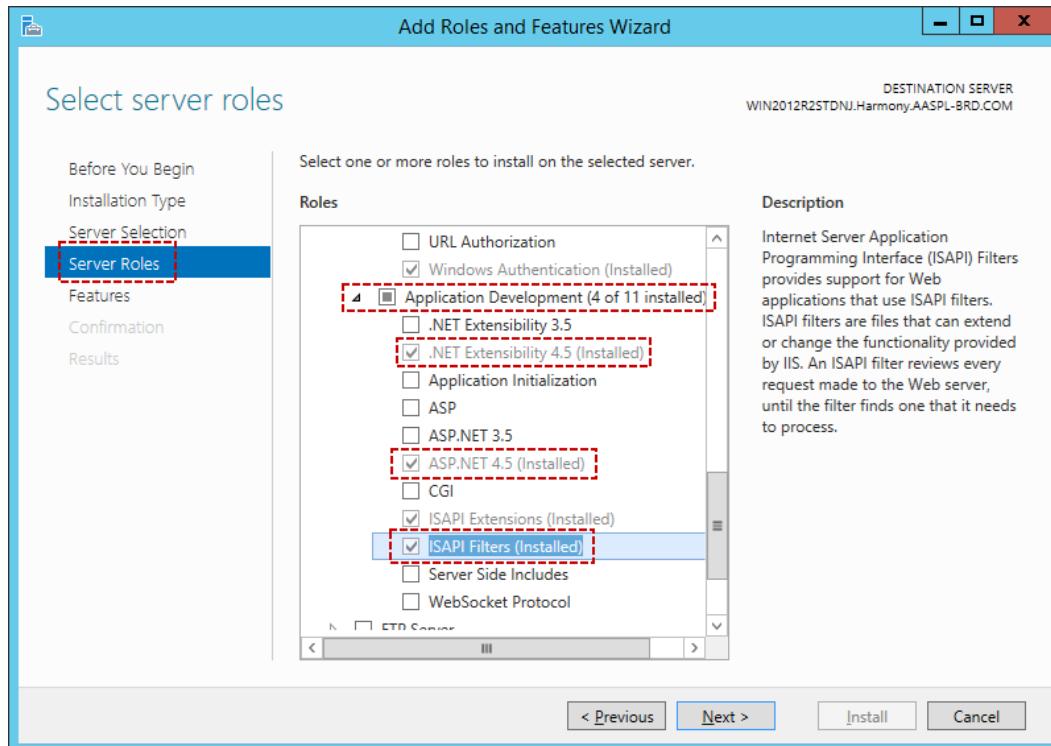


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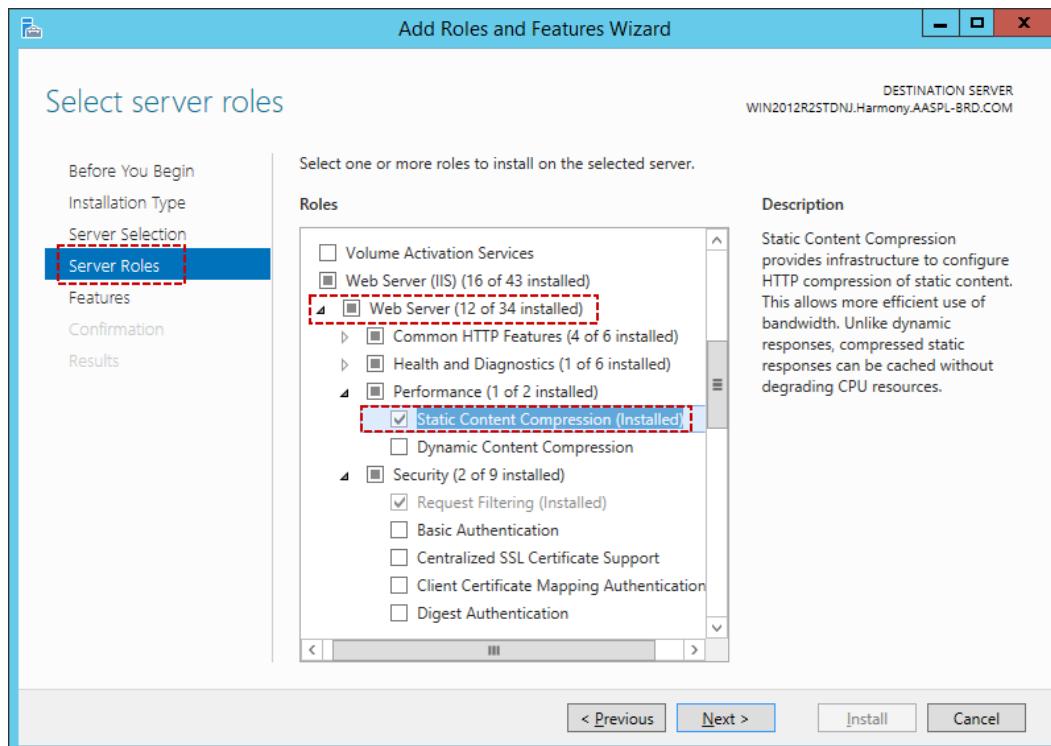
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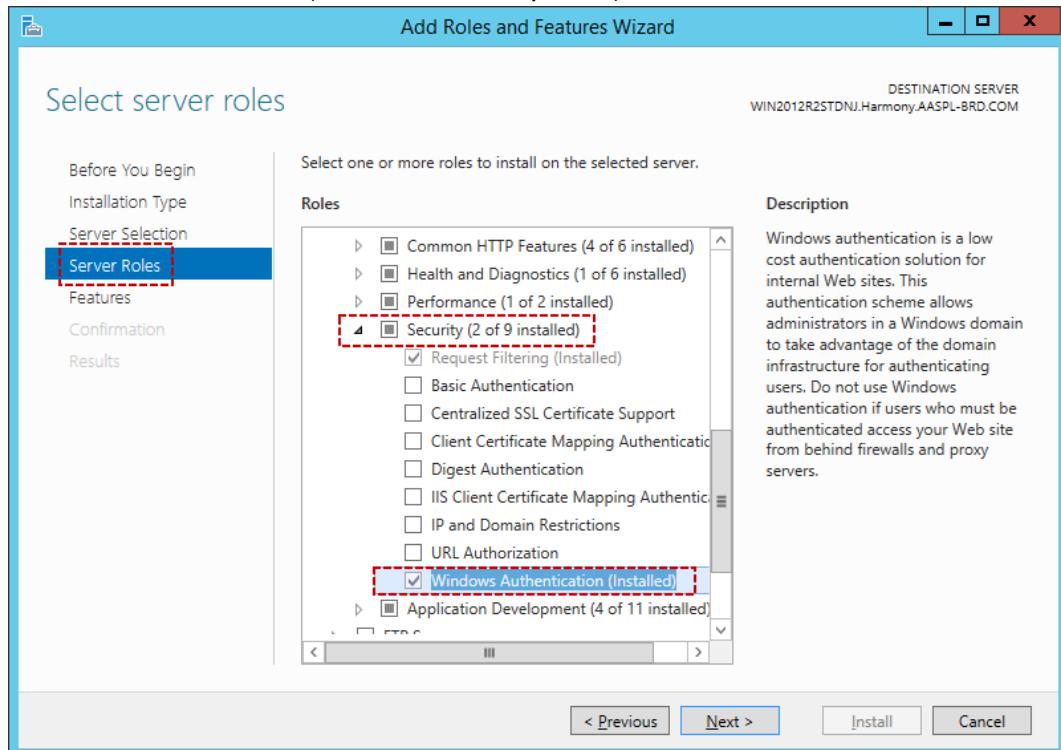
### 3. ISAPI Filter



### 4. Static Content



## 5. Windows Authentication (for Active Directory Users)



## 6. IIS Management Service (applicable only for Windows 7 SP1)

### 2.8 BROWSER SUPPORT

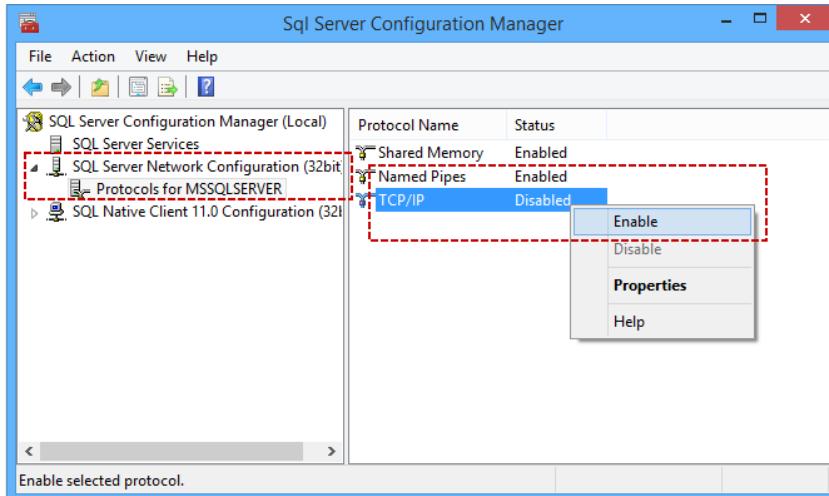
1. Internet Explorer: 10 and 11
2. Chrome: 49 and above
3. Firefox: 45, 46, and 47

## 2.9 ENABLING SQL SERVER CONFIGURATION

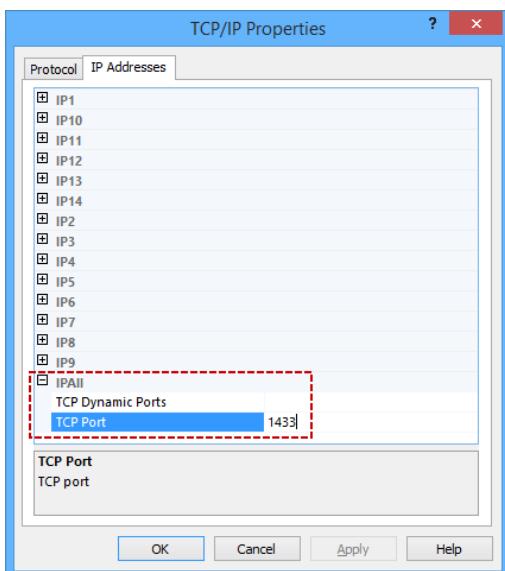
Ensure the Microsoft SQL Server configuration are in place before setting up the database for Control Room.

These settings can be configured in the SQL Server Configuration Manager.

1. Enable protocol for ‘Named Pipes’ and ‘TCP/IP’ in SQL Server Network Configuration > Protocols for MSSQLSERVER as shown:



2. If you have opted for custom installation, the next step involves setting the TCP/IP port. Context click or double click TCP/IP protocol, input the port number for ‘IPAll’ in the IP Addresses tab of IP Properties as shown:



*Tip:* Restart the MSSQLSERVICE for the updates to take effect.

## 2.10 CREDENTIAL VAULT—AN OVERVIEW

The Automation Anywhere Credential Vault is a centralized location wherein sensitive data such as credentials is securely stored.

The Credential Vault is configured by the Admin – the Control Room administrator, immediately post Control Room setup by generating a ‘Master Key’. Refer section on [Configuring the Credential Vault](#) for setting up a Credential Vault.

**⚠️ Important:** These credentials are encrypted using industry standard FIPS 140-2 approved cryptographic module with **AES-256-bit encryption** and can be accessed by authorized and authenticated users only.

A Credential Vault comprises credentials that are created and stored within the Control Room Database. An Admin, an IT Admin or any person who has Credential Management privileges can create Credentials in the form of ‘Credential Keys’, once the vault is opened by the Admin using the ‘Master Key’.

Credentials are identified by unique key name and contain one or more attributes that has a name value pair. For instance, a credential key that stores FTP server credentials could typically include attributes:

- Servername: 123.456.7.890
- Username: ftpadmin
- Password: \*\*\*\*\*

Refer section on [Defining Credential Keys](#) for creating Credential Keys in the Control Room.

Credentials are defined on the basis of an automation task’s requirement. A Bot-Creator – an AAE Client user who creates tasks, can use the credentials in the form of ‘Credential Variables’ in various commands; some being FTP, Object Cloning, Excel and REST Web Service. Refer the section on [‘Assigning Credential Variables’](#) for the full list of [commands](#) that support ‘Credential Variables’.

**Note:** Credential values are fetched from the vault and transmitted to the Client during task play via **TLS 1.2 protocol** for https when TLS is enabled.

### 2.10.1 Benefits of Credential Vault

Apart from providing a secure and centralized location for storing Credentials, it:

1. Minimizes the possibility of credential fraud.
2. Provides an environment to enable improved security.
3. Enables businesses to adhere to processes and credential management compliance.
4. Offers increased automation opportunities with secure data/applications.

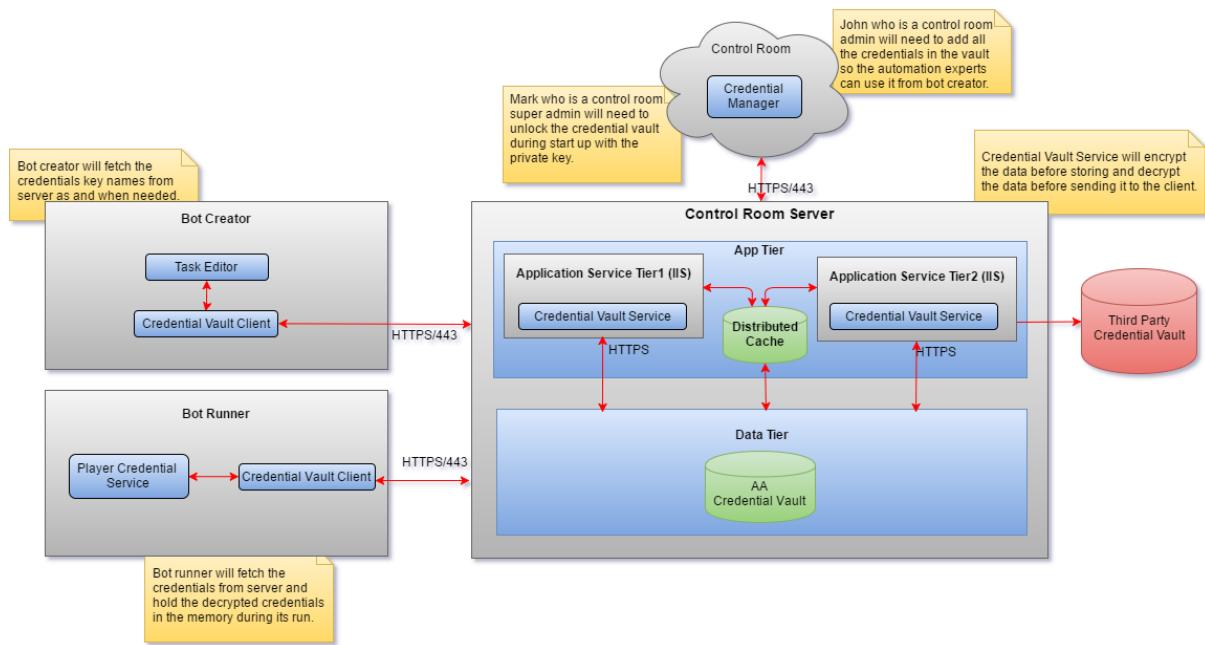


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## 2.11 TECHNICAL ARCHITECTURE DIAGRAM



### 2.11.1 To summarize:

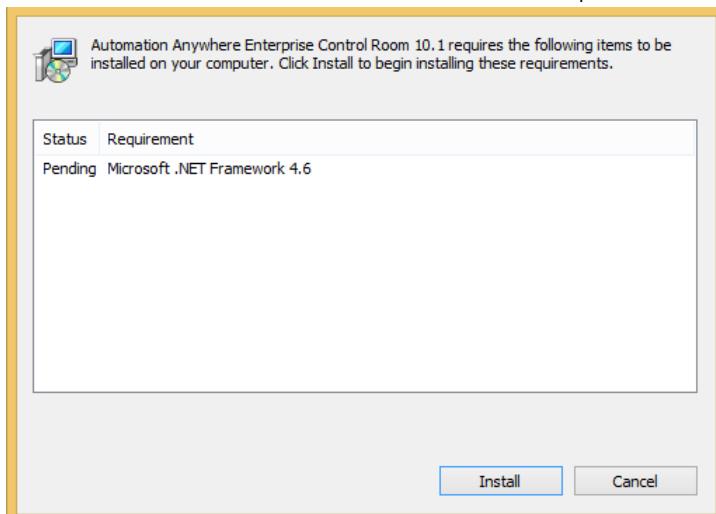
- Automation Anywhere offers an integrated Credential Vault, which stores all the credentials in Microsoft SQL Server Database.
- Credential Key variables are unique to Automation Anywhere platform and cannot be used outside of it.
- An automation task that has credential variables fetches it from the Vault only at task play.

## 3 INSTALLING, REPAIRING/REINSTALLING OR REMOVING AAE CONTROL ROOM

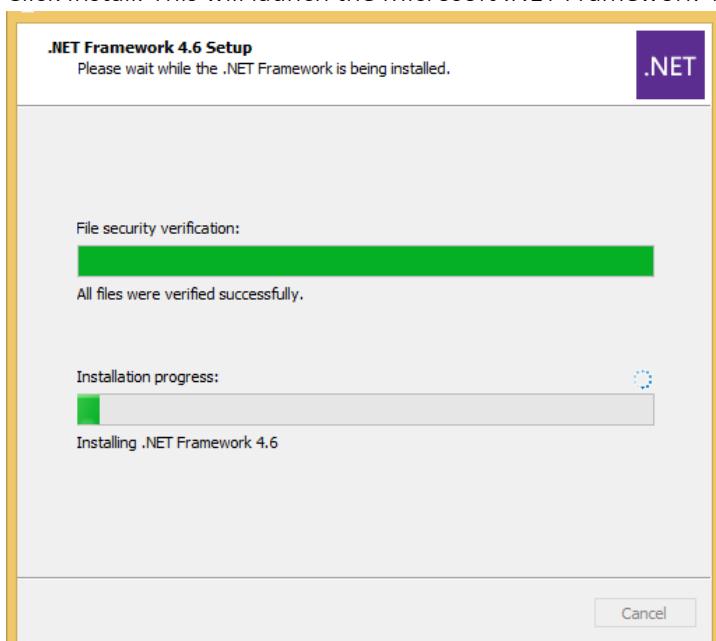
### 3.1 INSTALLING THE PREREQUISITES

Automation Anywhere Enterprise Control Room setup automatically installs the required prerequisites if found missing.

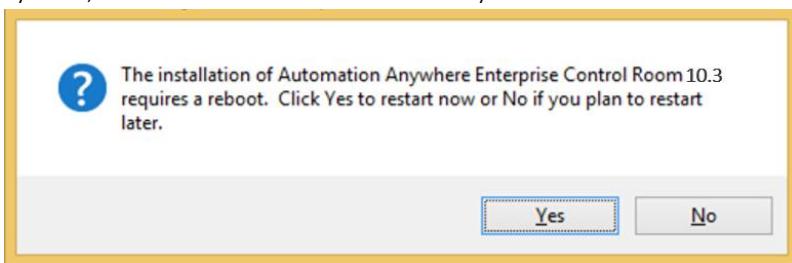
1. Run the Setup for Automation Anywhere Enterprise Control Room in Administrator mode.  
*Note: If you already have installed a previous version of the Control Room, ensure you perform a complete uninstall. This can be done from the Control Panel > Programs and Features.*
2. If .Net 4.6 component is missing, you will be displayed the pending component screen to install Microsoft .NET Framework 4.6 as it forms part of the Control Room prerequisites.



3. Click Install. This will launch the Microsoft .NET Framework 4.6 installation process.



4. You need to restart your system to complete the Installation process. After you restart your system, the installation will automatically resume.



## 3.2 INSTALLING THE CONTROL ROOM

Automation Anywhere Enterprise Control Room can be installed and configured using any of the two methods:

1. **Express** - Use the Express option to quickly install the Control Room with default settings.
2. **Custom** - Use the Custom option if you want to install the Control Room with manual settings. This installation type is recommended for production use.

## 3.3 EXPRESS INSTALLATION

Express mode of installation allows you to set up the Control Room quickly with minimal steps. It automatically configures the required parameters for different components using default values.

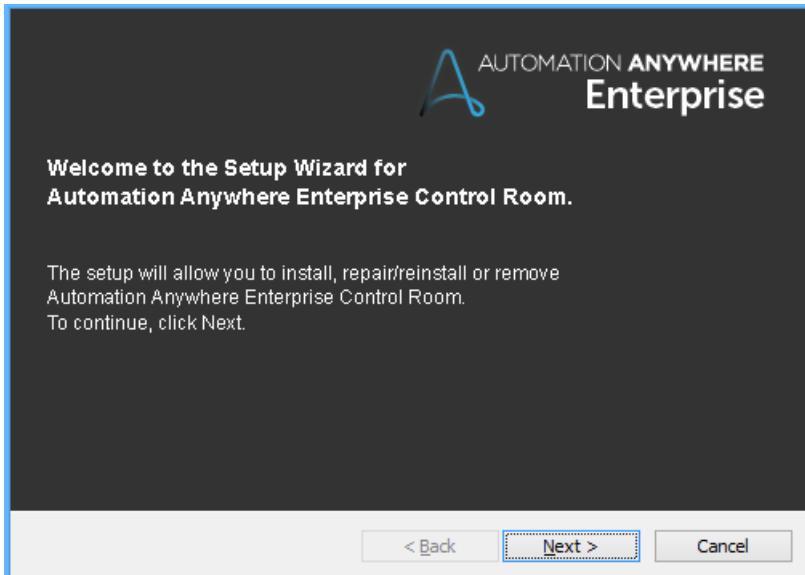
**Note:** You can change these parameters in subsequent installation if required.

The following describes steps to install the Control Room in Express mode:

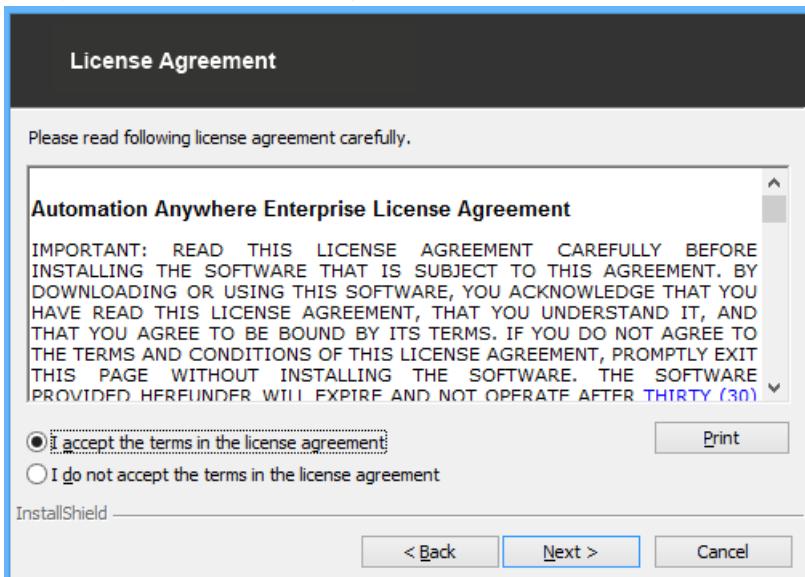
**⚠ Important:** Ensure you save your work and close open applications before you begin of installation.

1. If not installed, run the installer for "AAE\_10.3.0\_MSSQL\_Express\_2014SP1.exe" in administrator mode. This will install the Database Management System – Microsoft SQL Server Express 2014 (SP1).  
**Note:** The self-extracting exe allows to install only the SQL Engine for SQL Server Express 2014 SP1. It does not install the SQL Server Management Studio.
2. It will configure an instance 'AACRSQLEXPRESS', which will be used for the Control Room database.  
**Note:** This instance will be used to create the default Control Room database "CRDB", which will be configured only after you select the Express Mode of Control Room installation.
3. Now launch the Setup for Automation Anywhere Enterprise Control Room in Administrator mode.

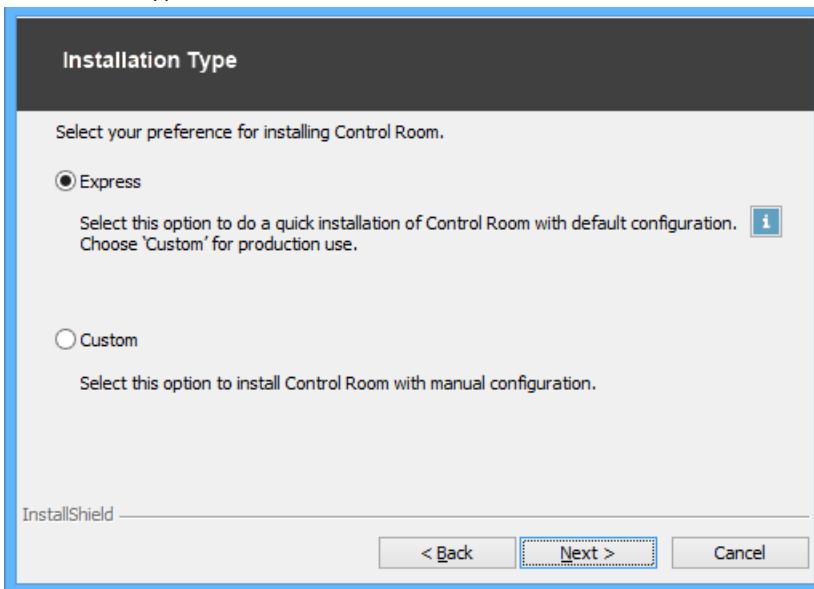
4. You will be displayed the Welcome to Setup Wizard screen.



5. Accept the terms of licence agreement.



6. Click Next. You will be displayed the 'Installation Type' page. Select 'Express' as your preferred installation type:

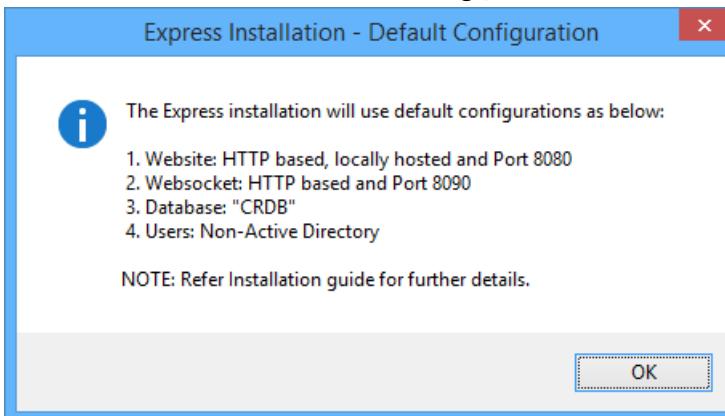


7. In Express installation, the default configuration allows to create a HTTP-based Control Room website hosted locally. It uses the default Microsoft SQL Server database instance 'AA CRSQLEXPRESS' with default admin credentials:

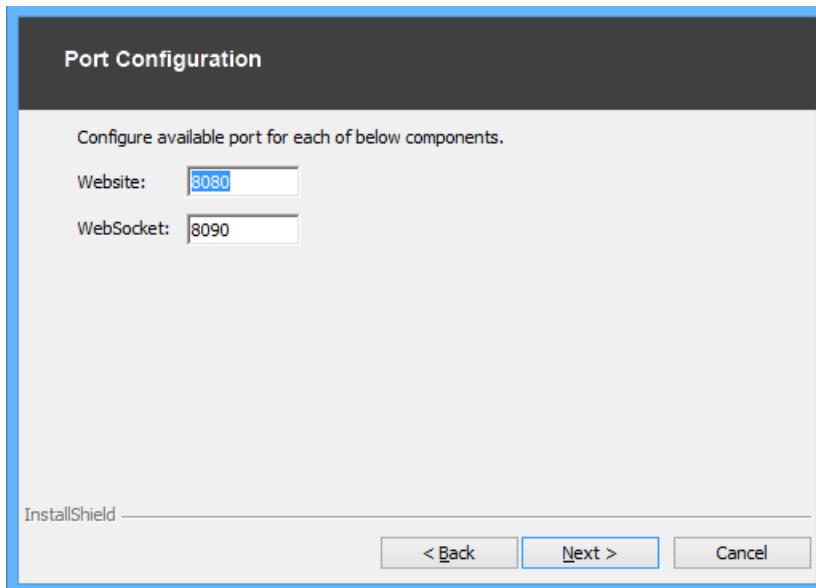
- Username: sa
- Password: aabots@123

This instance enables the Control Room administrator to create Non-Active Directory Users. All ports required to run the website and services are set to default.

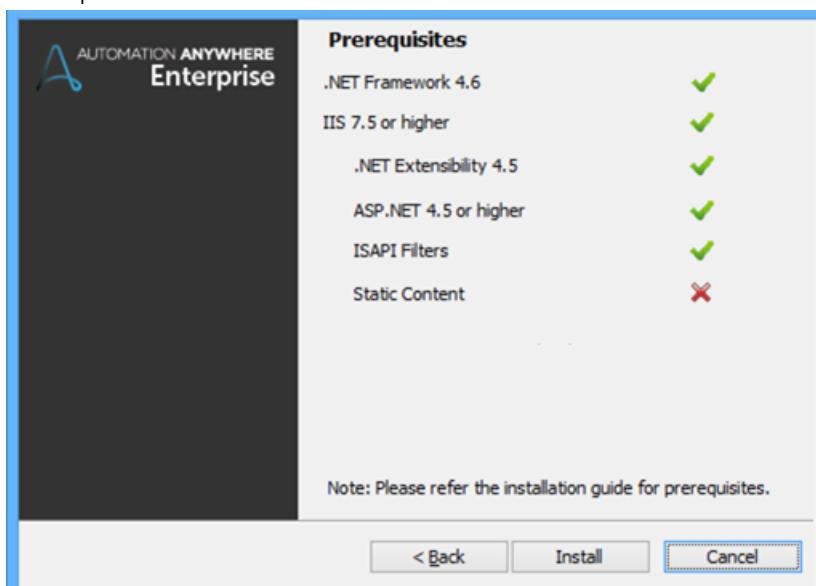
For more information on default settings, click on the information button:



**Note:** If any port required to setup the Website and WebSocket Service is unavailable, the field is highlighted.

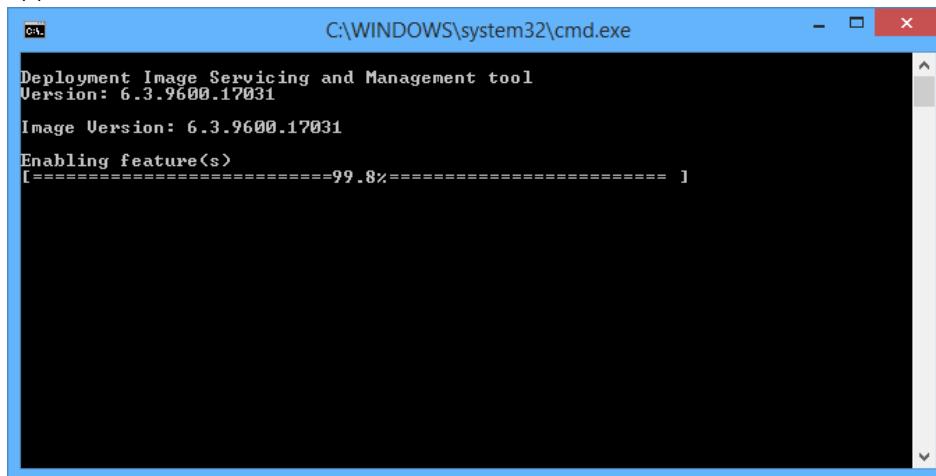


8. Specify an unassigned Port and click Next to continue.  
*Tip: For a new port you may have to create rules in Firewall to open the port.*
9. If any of the pre-requisites for IIS component is not met, you will be displayed the Prerequisites window.

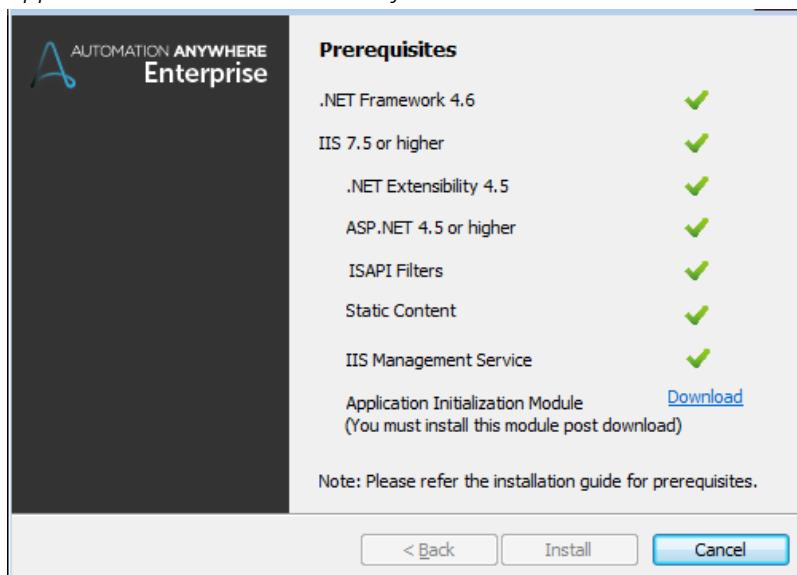


**Note:** An mark indicates that the component is not installed.

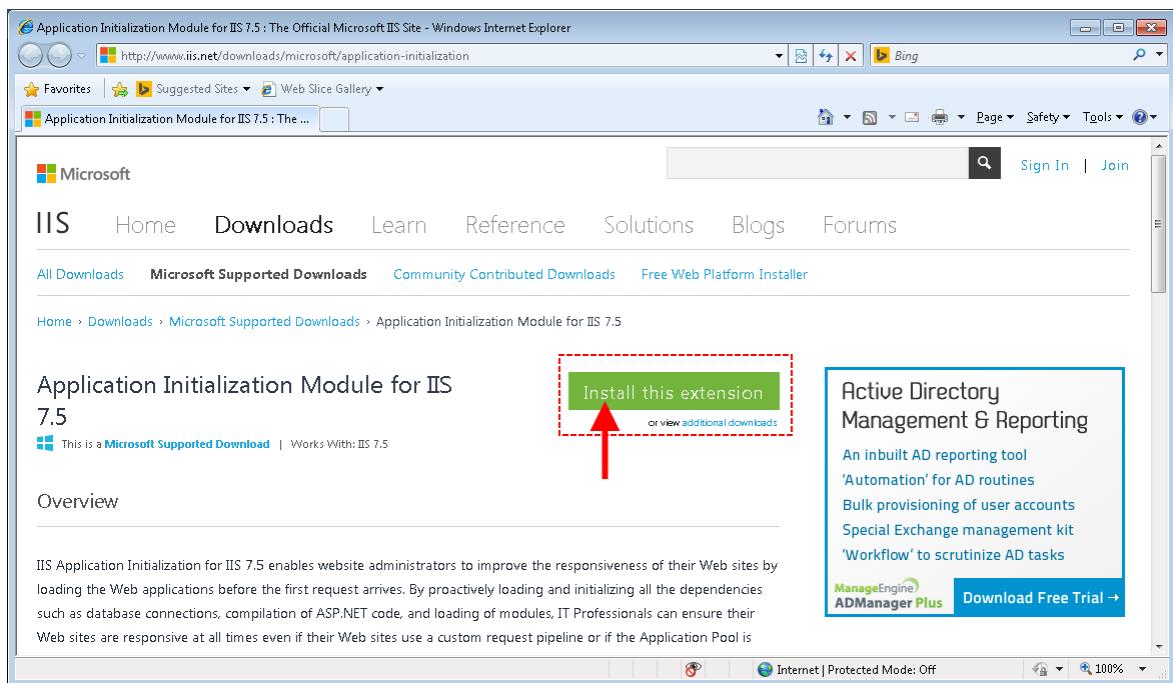
10. Click Install to install the IIS components automatically. A Windows Command prompt will appear. Do not close this window.



**Note:** If installing on Windows 7 SP1, you need to download and manually install the Application Initialization Module for IIS 7.5.



11. In the Application Initialization web-page that is launched in your default browser, click on 'Install this extension'.

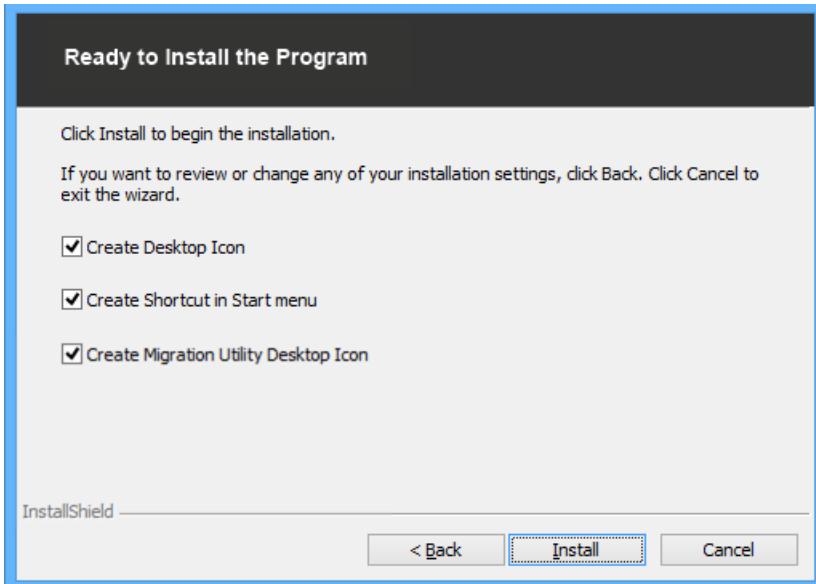


**Note:** For Windows 7 - 32 / 64 bit and Windows 2008 R2 64 bit, you can directly download the extension. Simply scroll down on the above web-page and select the download type:

The screenshot shows the 'Download Application Initialization for IIS 7.5' section of the web-page. It contains two download links: 'x86 for Windows 7' and 'x64 for Windows 7 or Windows Server 2008 R2'. A large red arrow points from the top of the page towards these download links.

IIS Application Initialization for IIS 7.5 enables website administrators to improve the responsiveness of their Web sites by proactively loading and initializing all the dependencies such as database connections, compilation of ASP.NET code, and loading of modules.

12. You can opt to create shortcuts on Desktop and/or Start menu for ease of access by marking 'Create Desktop Icon' and/or 'Create Shortcut in Start menu'. You can also opt to Create a shortcut for Migration Utility.

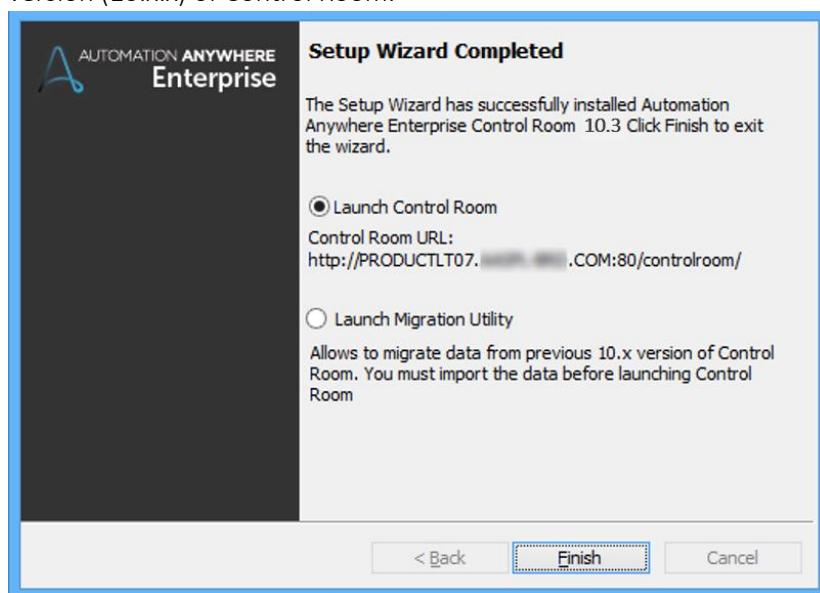


**Note:** By default, all options are enabled.

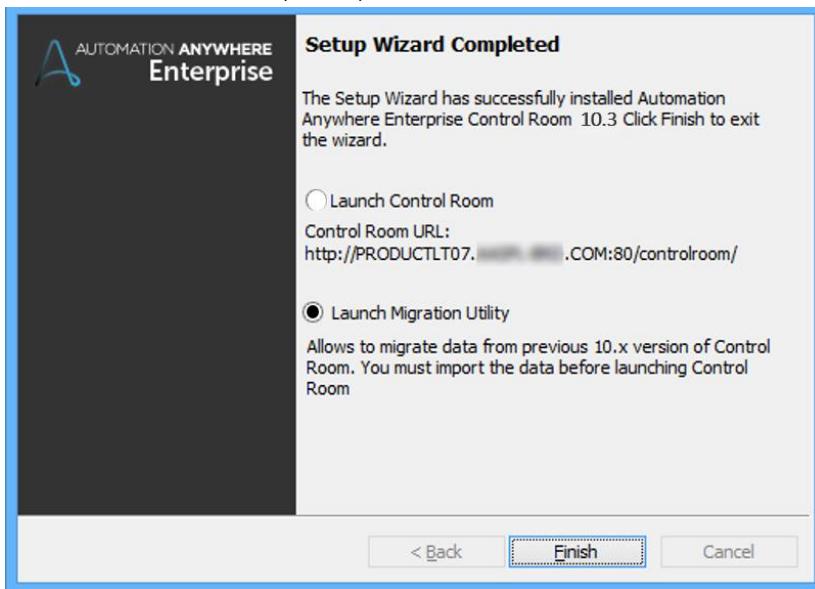
13. Click Install to begin installation of Control Room.

14. Once done, click on Finish.

- a. You can opt to launch the Control Room if no data needs to be migrated from an earlier version (10.x.x) of Control Room.



- b. Opt to launch the Automation Anywhere Data Migration Utility to migrate data from an earlier version (10.x.x) of Control Room database.



**Note:** The Control Room application will launch in the default browser if you opt to 'Launch Control Room'.

**⚠ Remember!** Note down the Control Room url as you will require the same post migration to finish the process of configuring Control Room settings.

You can begin using the Control Room by creating a Control Room administrator. Refer the section on [Launching Control Room for initial use](#).

### 3.4 CUSTOM INSTALLATION

The 'Custom' mode of installation enables you to install the Control Room using your choice of settings. This mode gives you the flexibility to select components for installation – Application or Shared Data & Services or both.

Hence you will be able to:

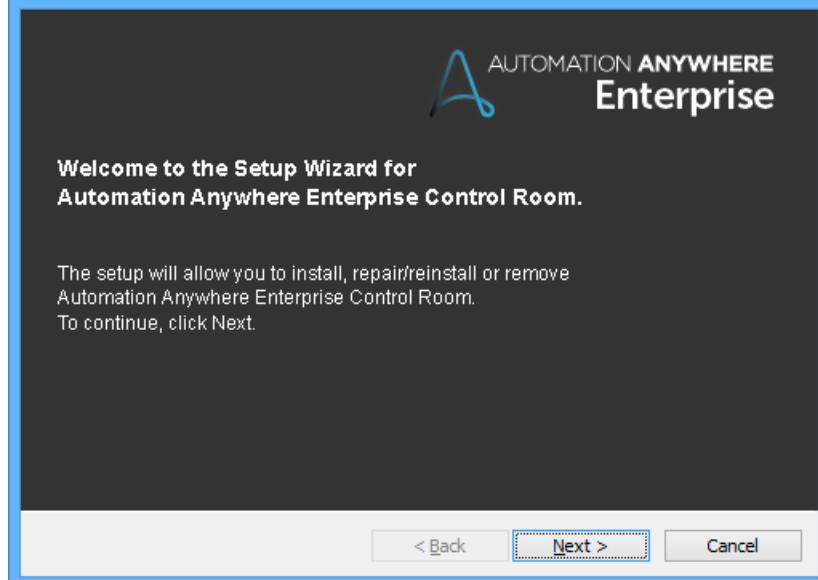
1. Choose which component to install – Application or Shared Data & Services or both
2. Configure the Website - http or https
3. Configure WebSocket – define port and select certificate if https is enabled
4. Define Control Room Database and User Credentials
5. Select the path of shared Repository
6. Define user types – Active Directory or Non-Active Directory
7. Choose an installation path

### 3.5 CUSTOM - STANDALONE MODE OF INSTALLATION

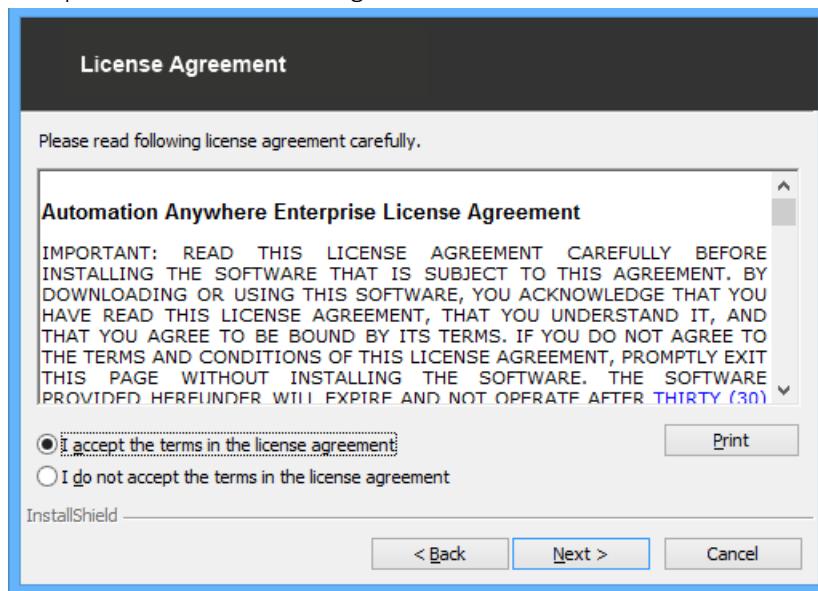
If you are configuring the Control Room database for the first time, ensure you have created an instance of a database in Microsoft SQL Server.

The following describes steps to install the Control Room in Custom mode:

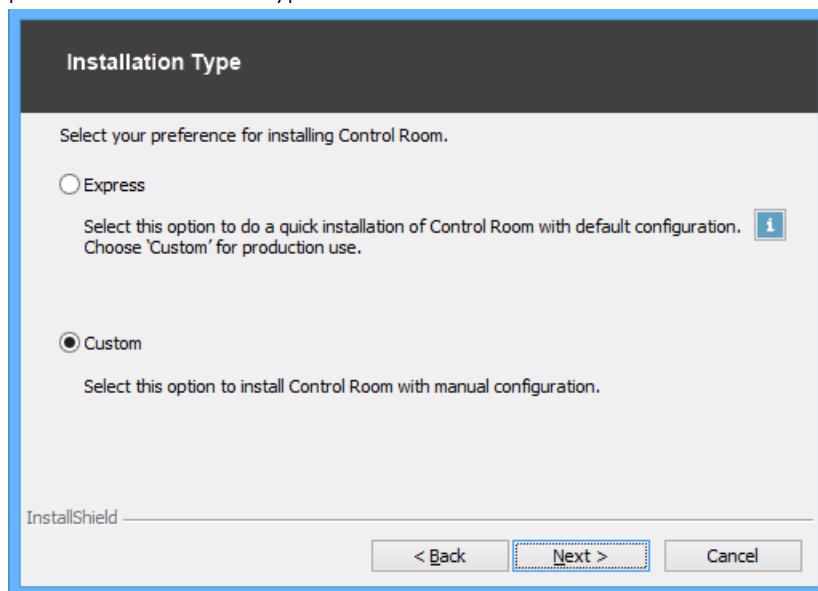
1. Run the Setup for Automation Anywhere Enterprise Control Room in Administrator mode.
2. You will be displayed the Welcome to Setup Wizard screen.



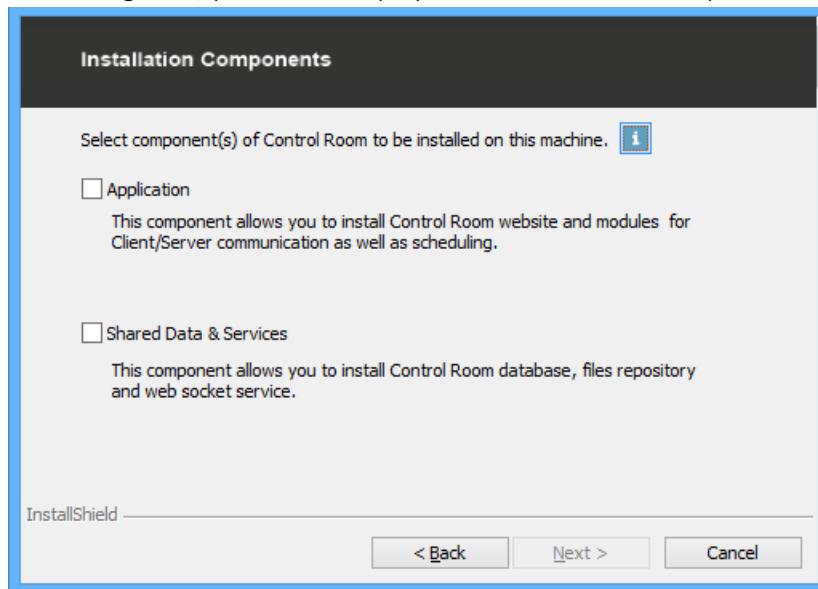
3. Accept the terms of licence agreement.



4. Click Next. You will be displayed the ‘Installation Type’ page. Select ‘Custom as your preferred installation type’

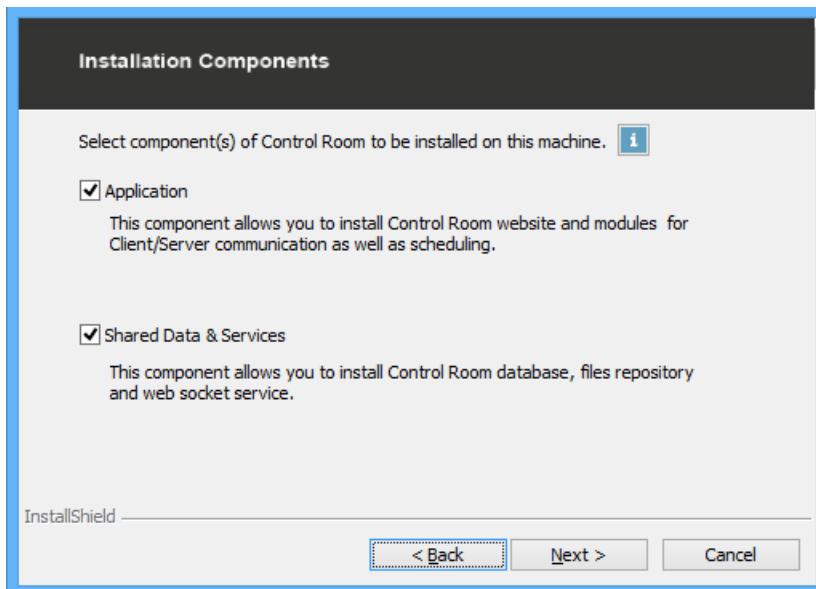


5. On clicking Next, you will be displayed the ‘Installation Components’ page.

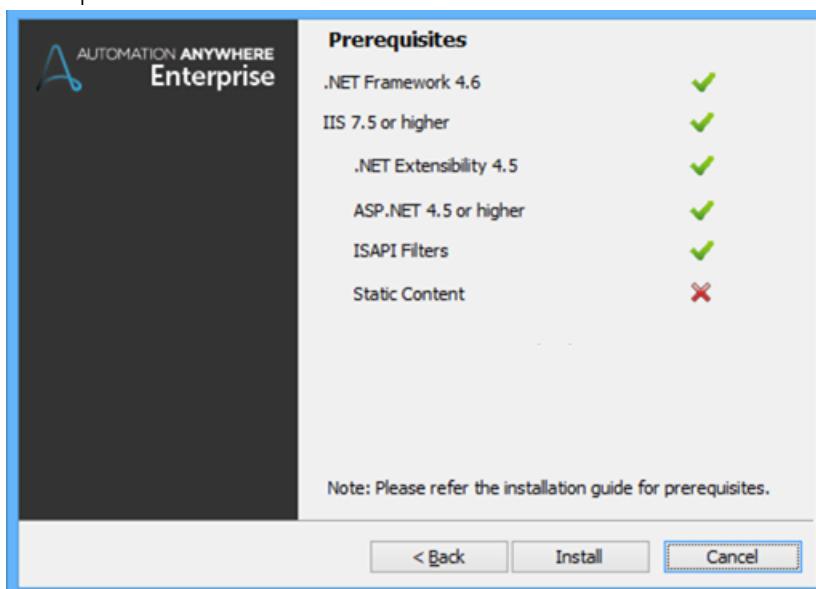


Based on component(s) selected for installation, two modes of installation – ‘Standalone’ and ‘Distributed’ are available.

1. To install Control Room in Standalone mode, select both the components – ‘Application’ as well as ‘Shared Data & Services’.

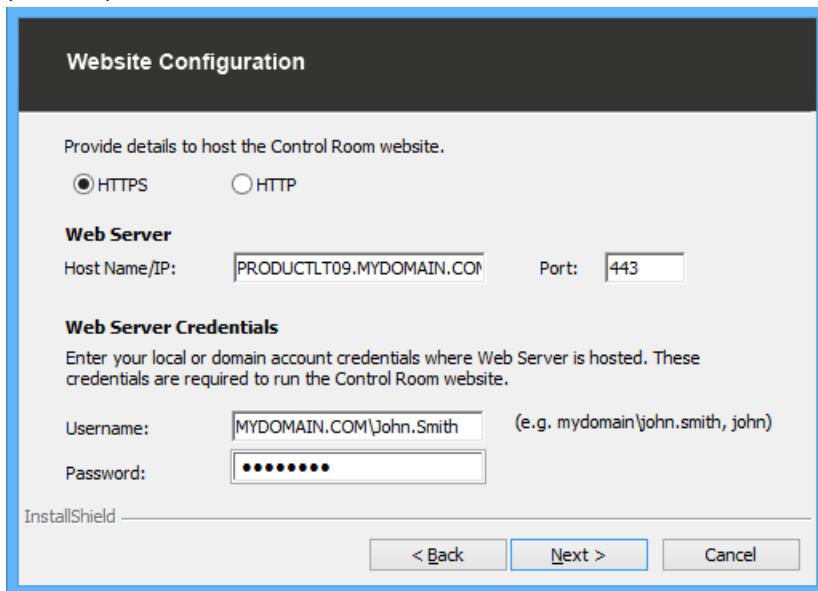


2. Click Next. If any of the pre-requisite for IIS component is not met, you will be displayed the Prerequisites window.



*Note: An ✗ mark indicates that the component is not installed.*

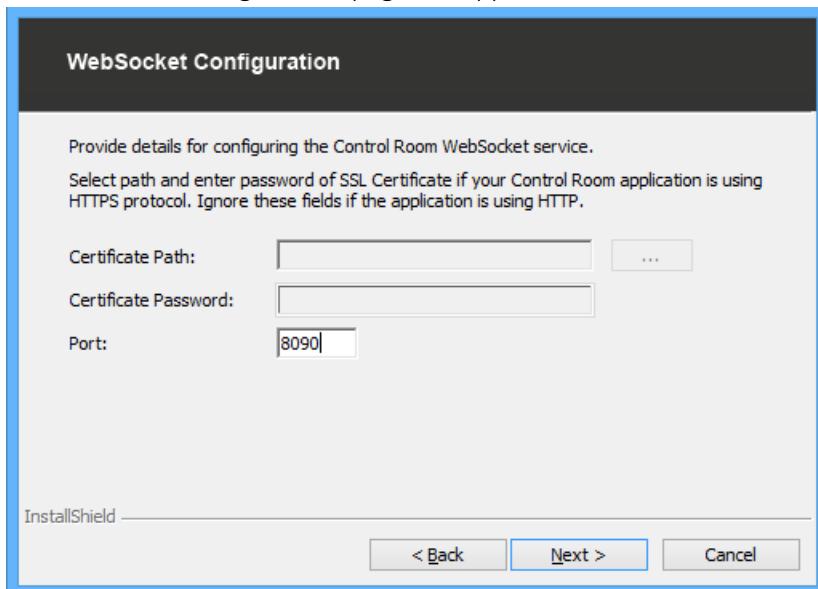
3. If all components are present, you will be displayed the Website Configuration page wherein you can provide details to host the Control Room website.



4. Select 'HTTP' or 'HTTPS'.  
If you wish to configure a secured site, select 'HTTPS'. Choose 'HTTP' for a non-secured site.  
**Note:** You will need a valid security certificate if you choose HTTPS. Refer section on [Site Bindings](#) to learn more.
5. Key in your Web Server Hostname; an IP or Server name.  
**Note:** By default, it displays fully qualified name of the local machine.
6. Key in Web Server Port. By default, the port is set to 80 (for HTTP) or 443 (for HTTPS).  
**Note:** It should be between 1 and 65535. Change the port if it is already in use.
7. Input your Web Server Credentials. Ensure to append the domain name, when configuring the Control Room in a multi-domain environment.  
**Note:** These credentials are required for an Account with administrator privileges. These will be your Windows credentials.

8. Click 'Next' to proceed.

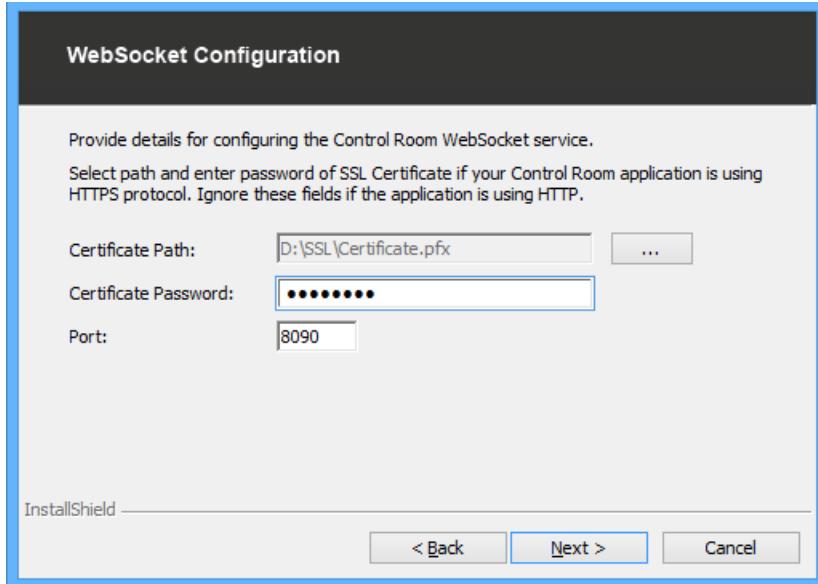
A 'WebSocket Configuration' page will appear:



If you have chosen 'HTTP' in Website Configurations, only the 'Port' needs to be configured:

**Note:** By default, it is set to '8090' and is used to host WebSocket Service. Change the port if it is already in use.

9. For 'HTTPS', you need to specify the Certificate Path and Password:

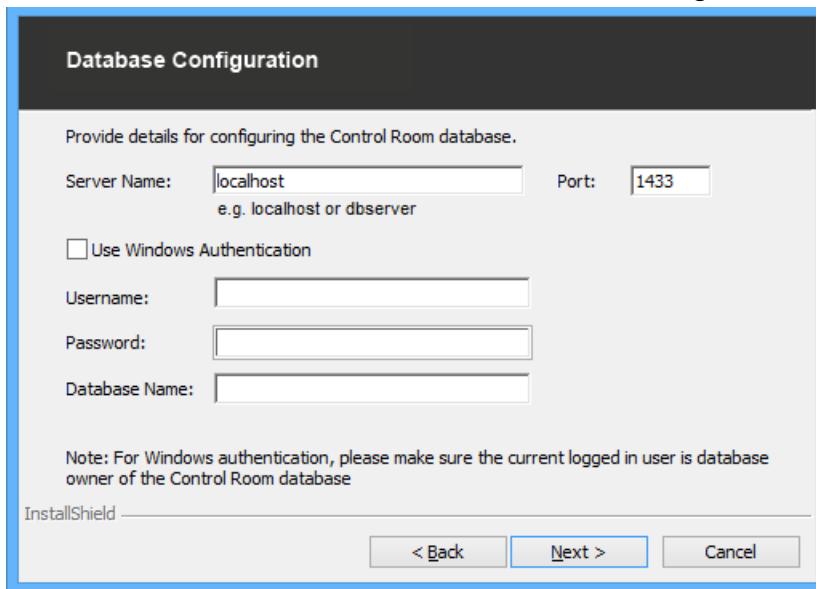


10. Browse to the folder and select the certificate file.

**Note:** The IIS that will host the Control Room website must have the SSL certificate installed. Refer section on [Site Bindings](#) to learn more.

11. Enter the password for the certificate and the port.

12. Click Next. A ‘Database Configuration’ page will appear. Input required data for configuring the Control Room database on localhost or the server using Microsoft SQL Server.



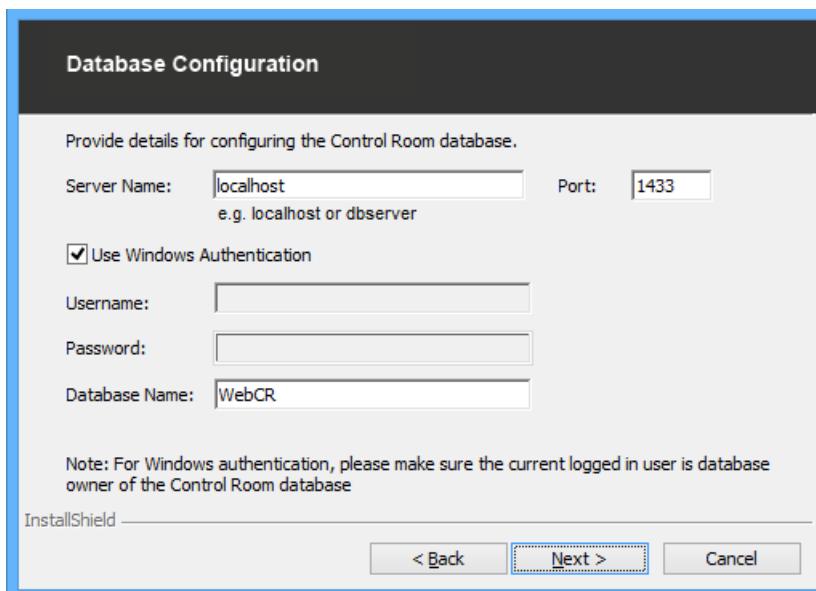
13. Key in the port number. By default, it is set to 1433 for Microsoft SQL Server.

**Note:** It should be between 1024 and 65535. The port can be changed from SQL Server Configuration Manager. Refer the section on [Enabling SQL Server Configuration](#) for details.

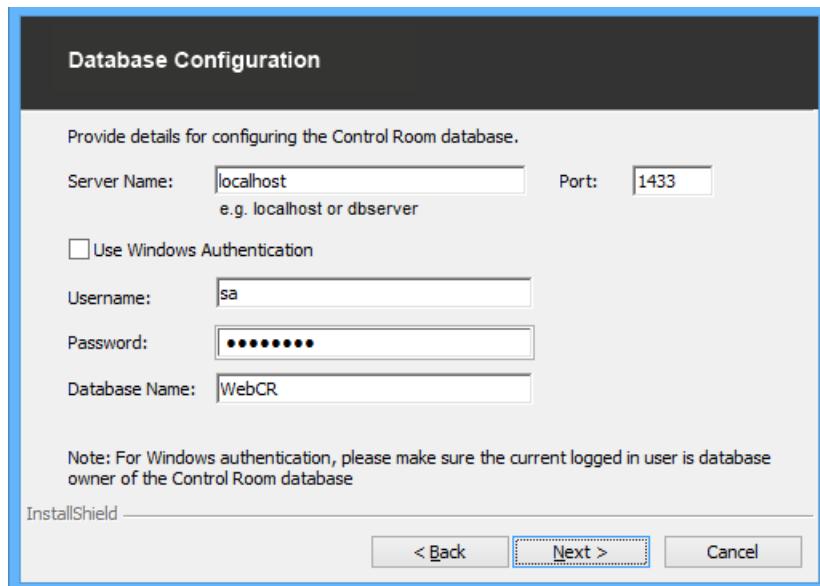
14. Select the ‘Database Administrator’ type to create an account to access the Control Room database. This must be created prior to configuring the Control Room.

- a. Select the option **Use Windows Authentication** if you have configured Windows users to an existing instance of the SQL Server. Here, the Username and Password fields are pre-filled and disabled. You simply have to input a Database Name.

**Note:** Ensure the database user defined for authentication has ownership privileges to the Control Room database.

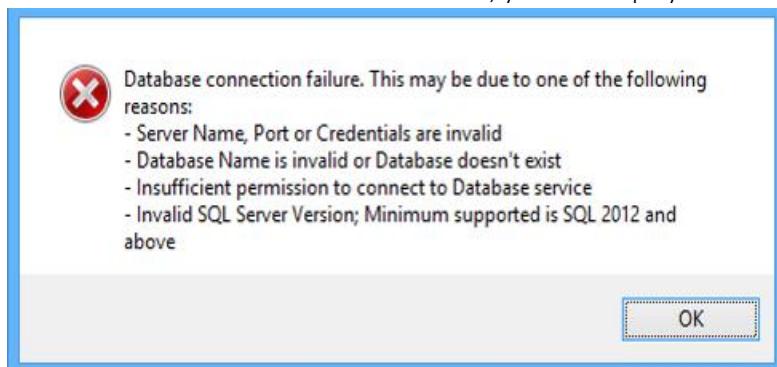


- b. Key in the Username, Password, and Database Name to connect to the SQL Server using the default database admin credentials.

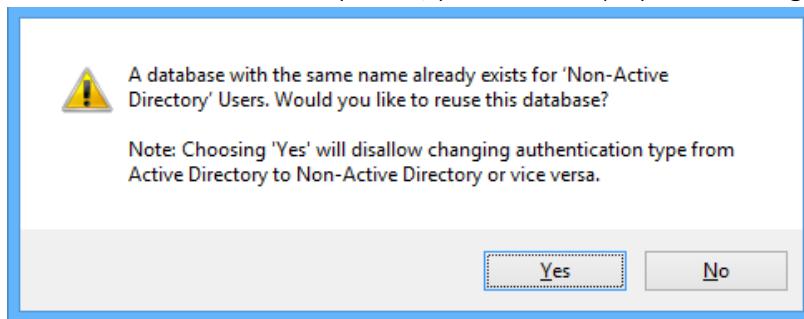


**Note:** If you are creating a dedicated SQL user or using an existing SQL user, provide the user database ownership privileges to Control Room database.

- If there is a connection error to database, you are displayed:



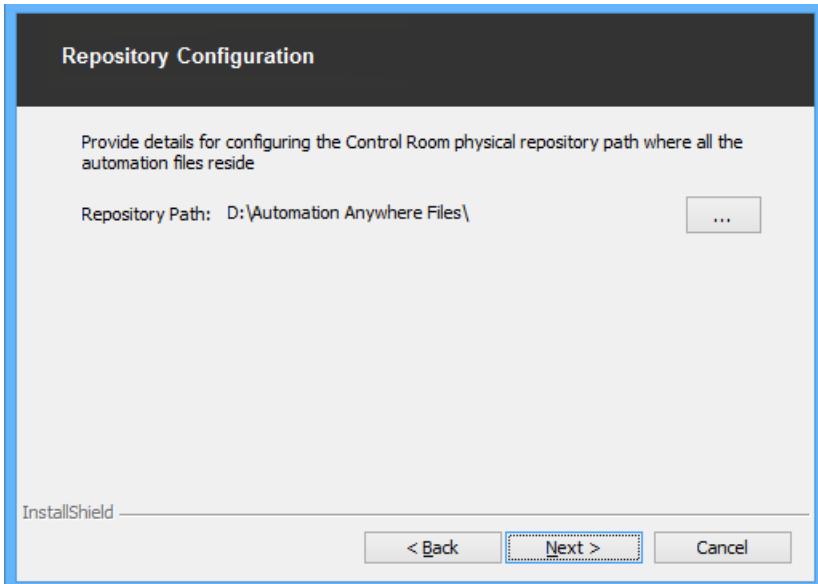
- If the database name already exists, you will be displayed a warning:



15. Click Next to set the Automation Anywhere Control Room Repository path. This is where your Automation Anywhere files are stored. You can opt to change the path in the installer by clicking the browse button.

**Note:** This configuration is available to users who are installing the Control Room with a new database.

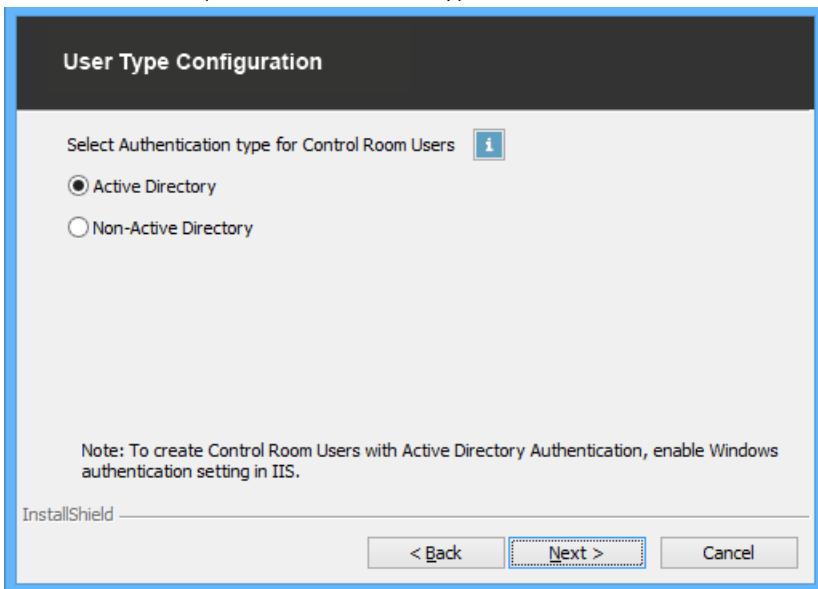
**Note:** You must have the required access privileges to a folder that you choose as Repository. The default path is set to "C:\Users\Public\Documents\Automation Anywhere Server Files".



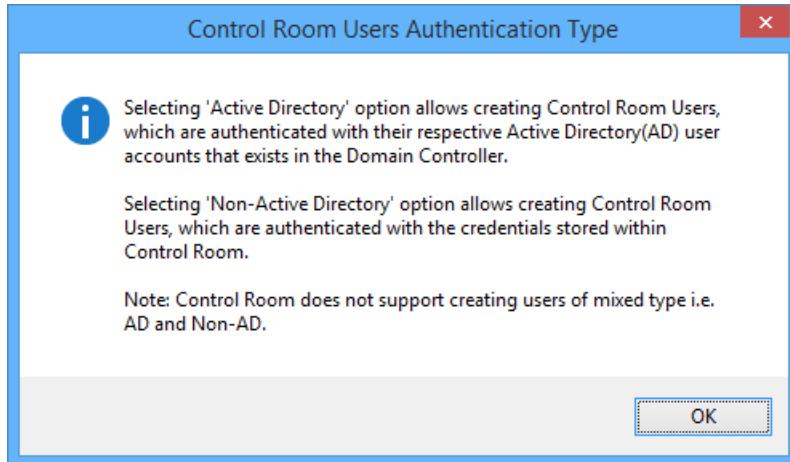
*Tip: You can also opt to edit the path from the Control Room settings, post installation.*

16. Click Next. If you have configured a new database or are installing the Control Room for the first time, you are displayed the 'User Type Configuration' page. Select User Type to configure in Control Room.

The Control Room database can be configured to allow creating either Active Directory (AD) users or non-AD (Non-Active Directory) users.

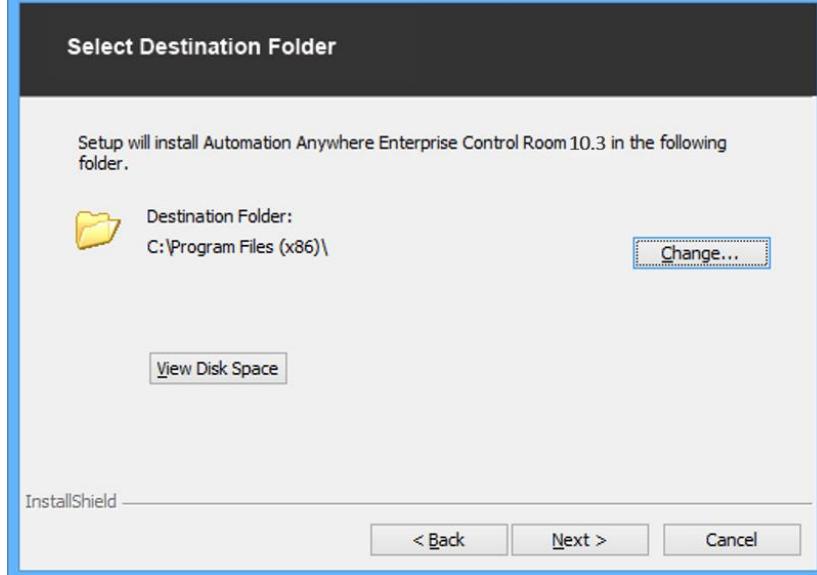


**Tip:** To help decide which to choose, click on the information button. You will be displayed the following information:

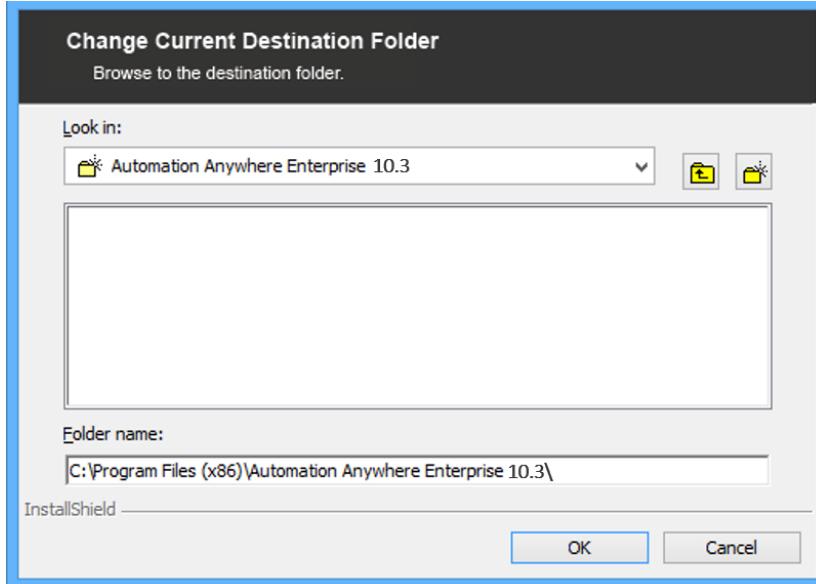


- **Active Directory Users** – Will be authenticated with their Active Directory credentials.
  - **Non-Active Directory Users** – Will be authenticated with credentials that are stored in the Control Room database.
17. Click Next. A 'Select Destination Folder' will appear. Here you can select the destination folder to install the Control Room application files.

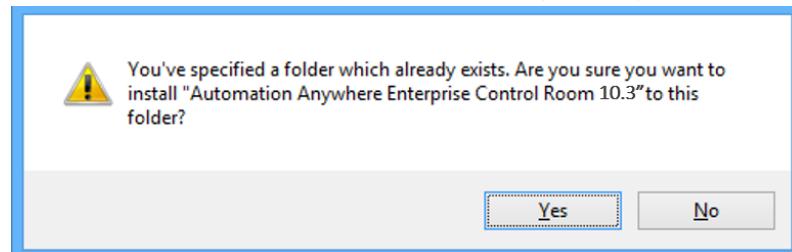
**Note:** By default, Control Room will be installed in C:\Program Files (X86)\



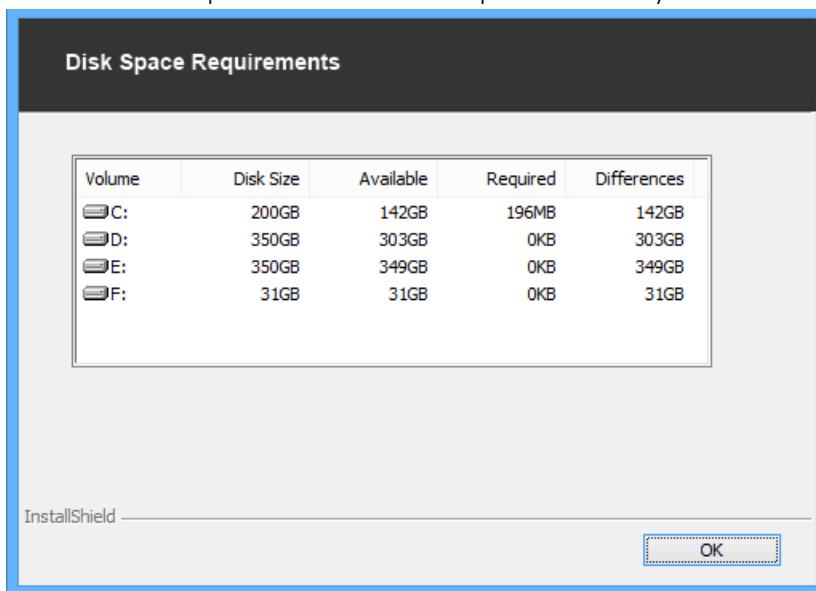
18. Click Change if you want to change the destination folder.



If the selected folder already exists, a warning message will be displayed:

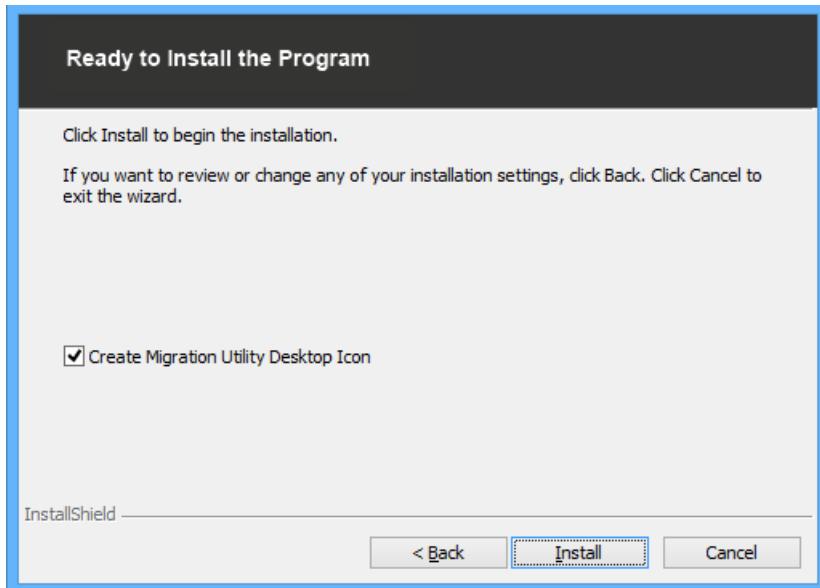


19. Click 'View Disk Space' to view the disk space availability.



20. Click Next. A ‘Ready to install the Program’ page will appear.

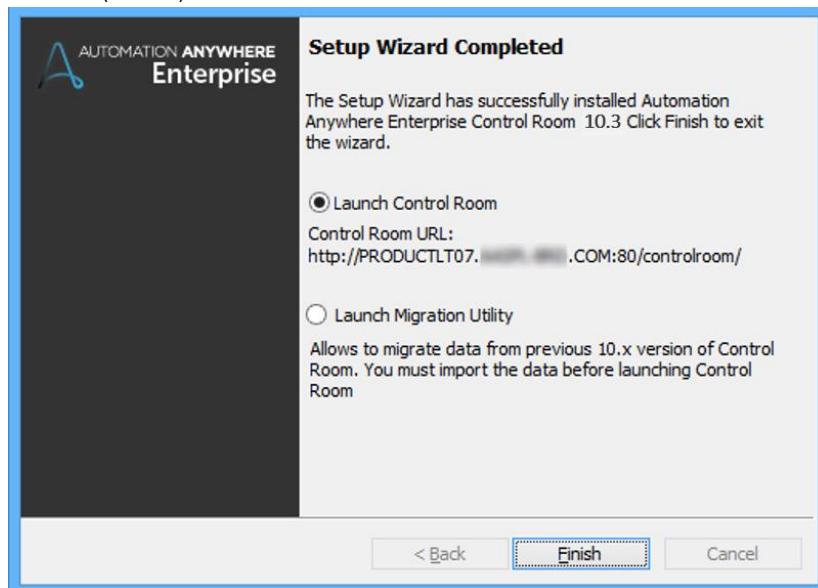
**Tip:** Select the option for creating a shortcut to access the Automation Anywhere Enterprise Data Migration Utility to enable you to migrate data from an earlier version of Control Room database.



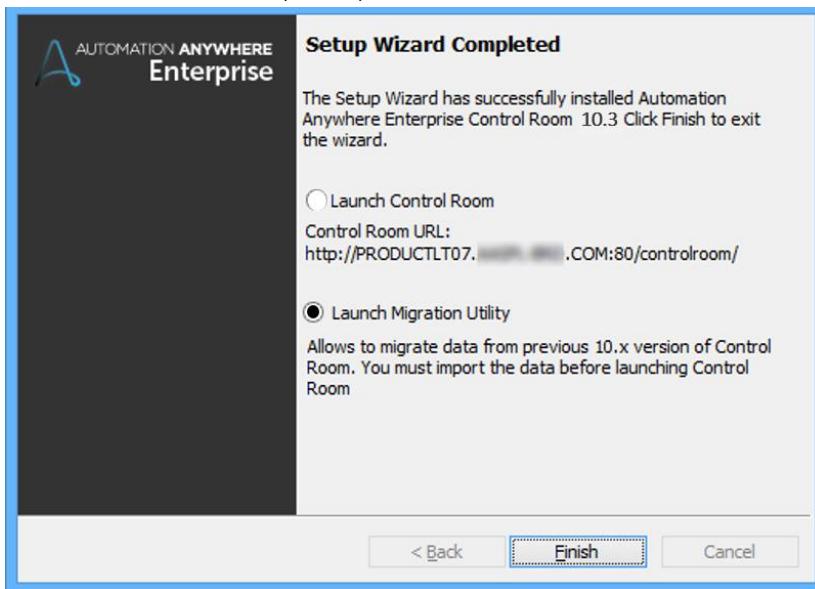
21. Click ‘Install’ to proceed.

22. Click Finish to complete the installation process.

- You can opt to launch the Control Room if no data needs to be migrated from an earlier version (10.x.x) of Control Room.



- b. Opt to launch the Automation Anywhere Data Migration Utility to migrate data from an earlier version (10.x.x) of Control Room database.



**Note:** The Control Room application will launch in the default browser if you opt to 'Launch Control Room'.

**⚠ Remember!** Note down the Control Room url as you will require the same post migration to finish the process of configuring Control Room settings.

You can begin using the Control Room by creating a Control Room administrator. Refer the section on [Launching Control Room for initial use](#).

## 3.6 CUSTOM - DISTRIBUTED MODE OF INSTALLATION

**Pre-requisite:** Before running the setup in this mode ensure that the folder which will be used to store Control Room files repository and Microsoft SQL Server database is shared across the network and the network drive is mapped.

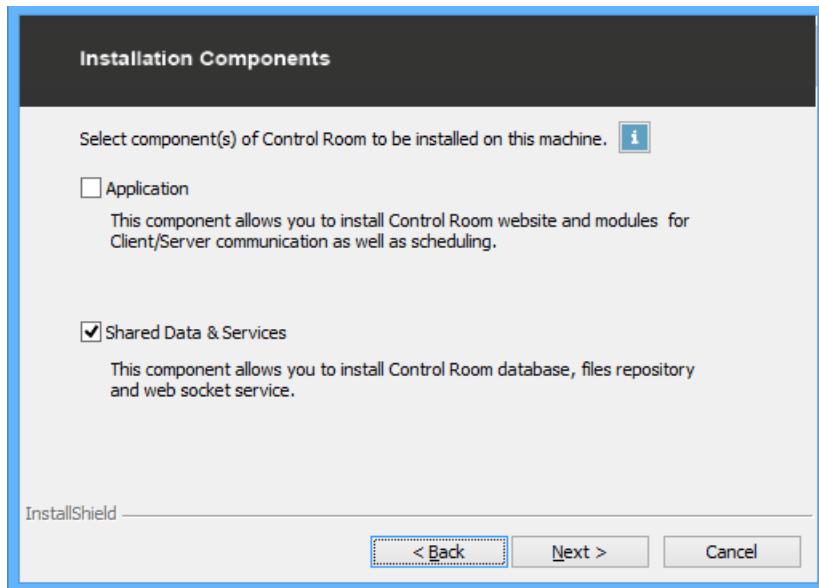
If you are configuring the Control Room database for the first time, ensure you have created an instance of a database in Microsoft SQL Server.

Also, if the Control Room is to be installed in a Multi-Domain environment, ensure all Control Room components (the Application and the Database layer) are installed in the same domain.

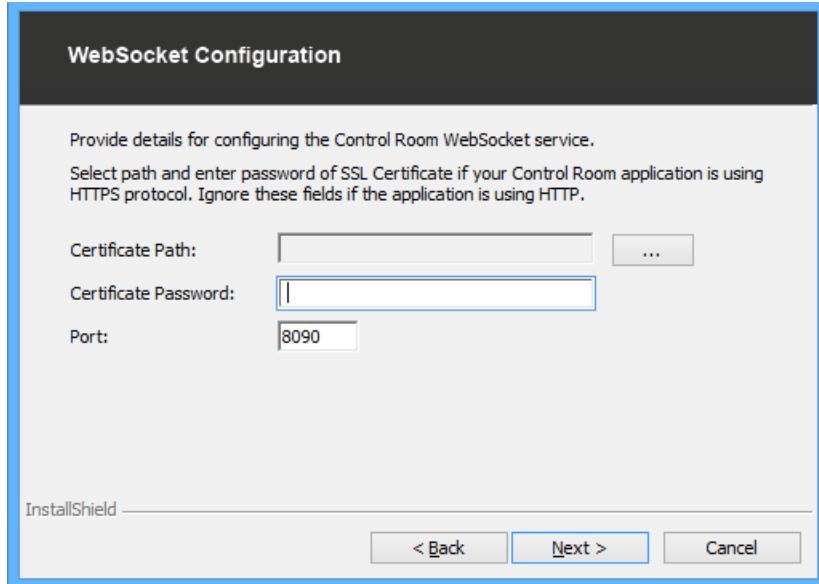
### 3.6.1 Installing Shared Data & Services component

- To install Control Room in Distributed mode, select first the 'Shared Data & Services' component for installation.

**Note:** Installation of 'Shared Data & Services' component should precede that of 'Application' component as the previous requires database credential input, which are then provided for installation of the latter.



- Click Next. The 'WebSocket Configuration' page will appear.

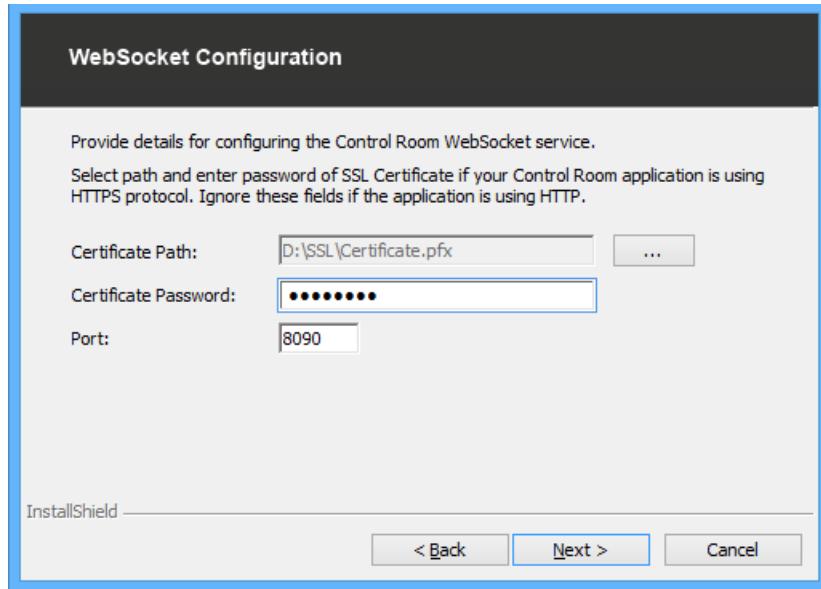


- If you opt to install Control Room Application component later with HTTP, then input the 'Port' number only.

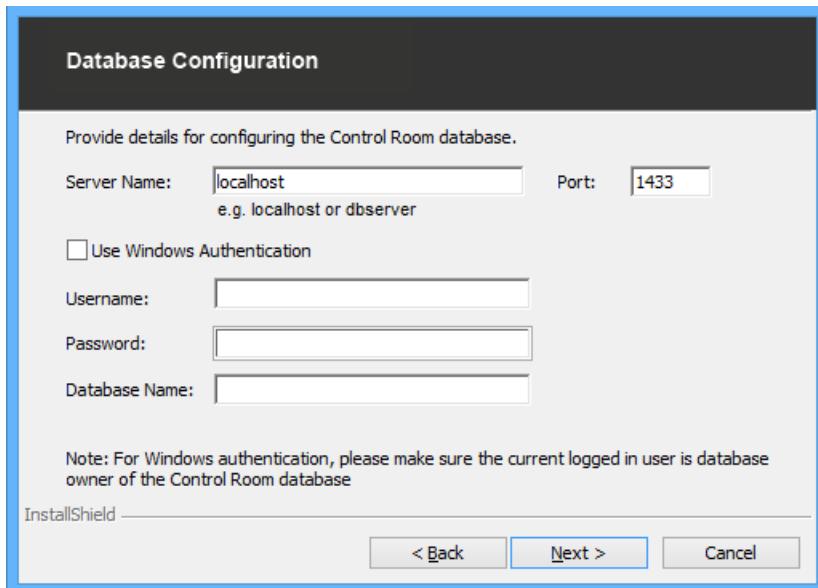
**Note:** By default, it is set to '8090' and is used to host WebSocket Service. Change the port if it is already in use.

**Tip:** Unblock the Control Room Services port by writing inbound/outbound rules in your firewall for shared data services.

- For 'HTTPS', you need to specify the Certificate Path and Password:



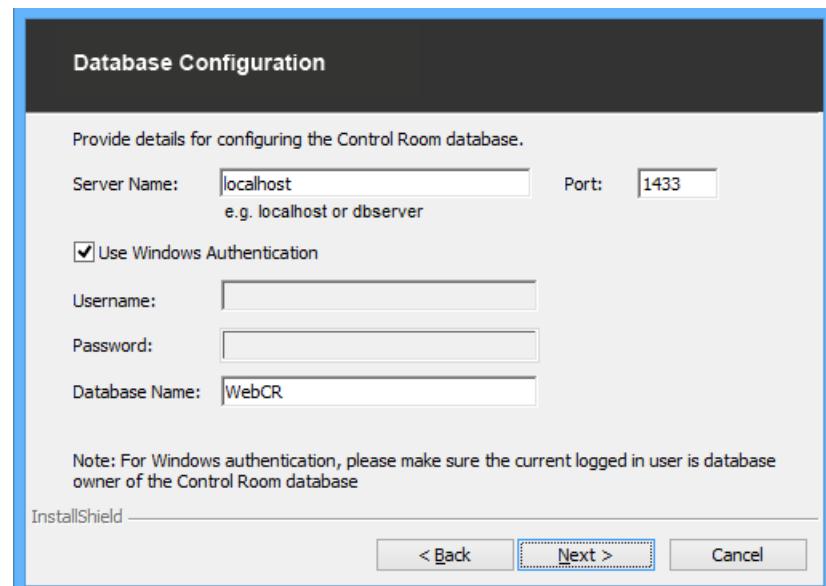
- Browse to the folder and select the certificate file.  
*Note that the IIS that will host the Control Room website must have the SSL certificate installed. Refer section on [Site Bindings](#) to learn more.*
  - Enter the password for the certificate and the port.
4. Click Next. A 'Database Configuration' page will appear. Input required data for configuring the Control Room database on localhost using Microsoft SQL Server.



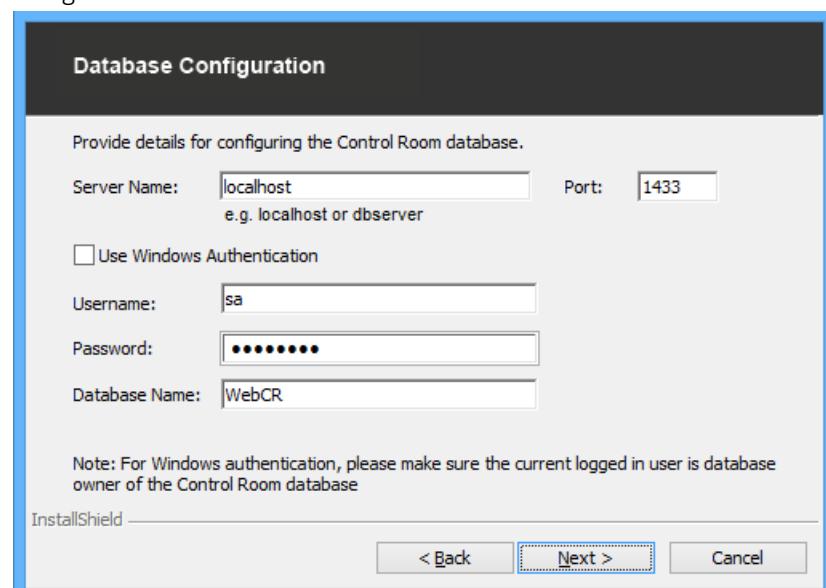
- Key in the port number. By default, it is set to 1433 for Microsoft SQL Server.  
*Note: It should be between 1024 and 65535. Change the port if it is already in use.*
- Select the 'Database Administrator' type to create an account to access the Control Room database.

- a. Select the option **Use Windows Authentication** if you have configured Windows users to an existing instance of the SQL Server. Here, the Username and Password fields are disabled. You simply have to input a Database Name.

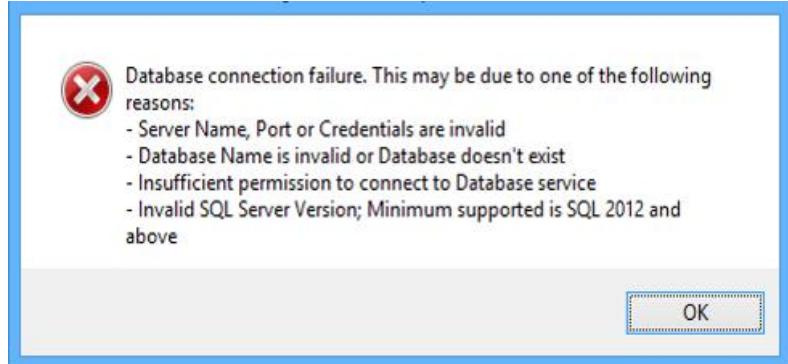
**Note:** Ensure the database user defined for authentication is also the owner of the Control Room database.



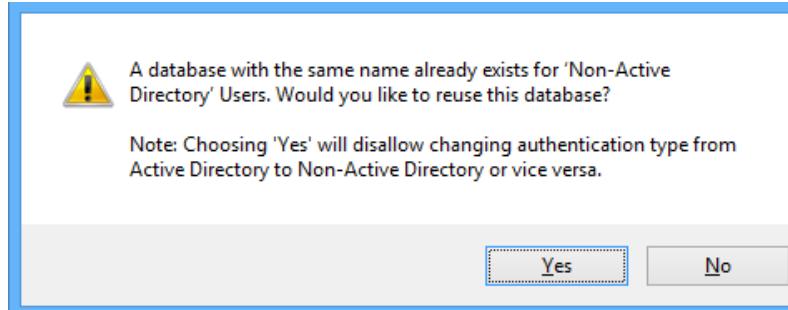
- b. Key in the Username, Password, and Database Name to connect to the SQL Server using the default database admin credentials.



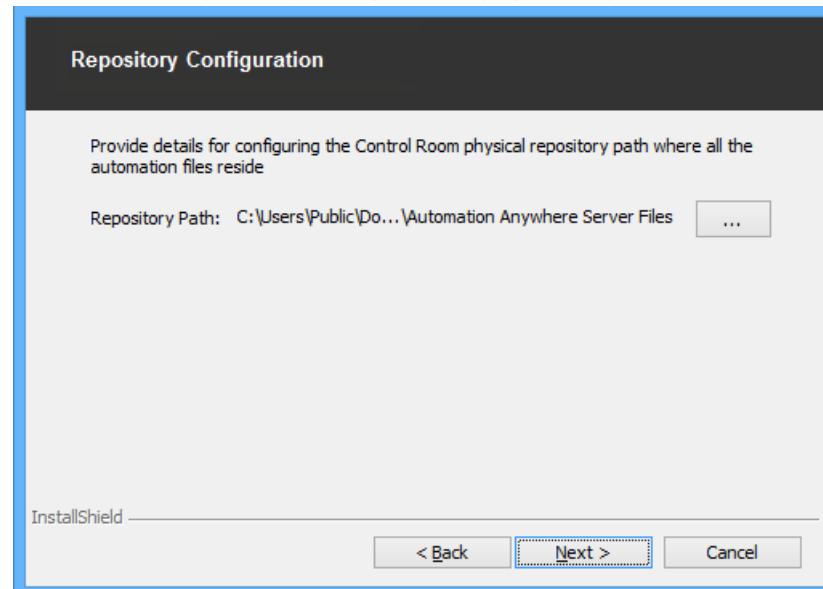
- If there is a connection error to database, you are displayed:



- If the database name already exists, you will be displayed a warning.



5. Click Next. A 'Repository Configuration' page will appear.



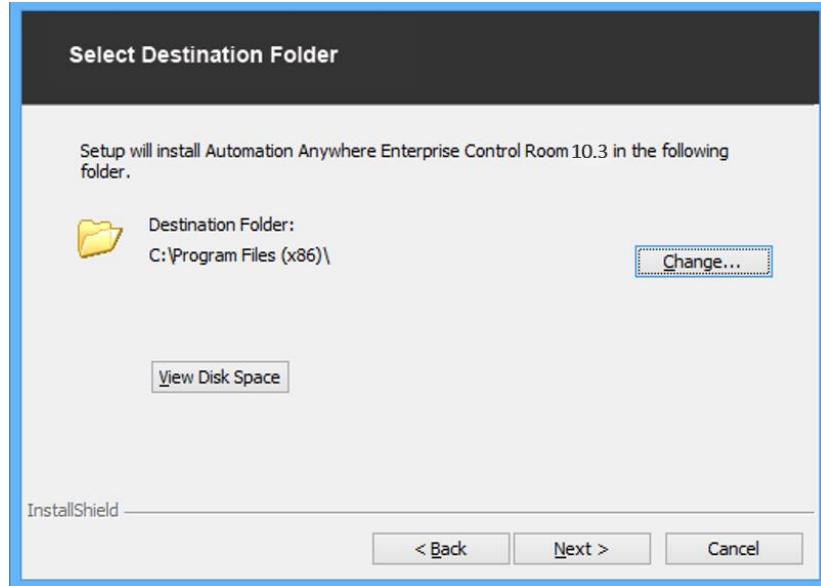
By default the Repository Path is set to "Automation Anywhere Server Files" folder under 'C:\Users\Public\Documents\'

6. Click the Browse button to browse to a different folder.

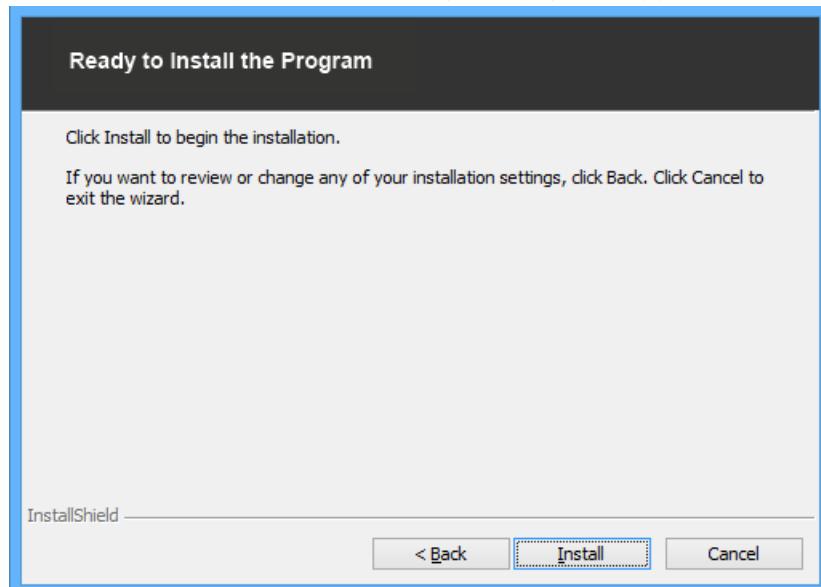
**⚠️ Important:** Ensure that the User session in which Control Room application will be installed has full access permissions for the Repository path you entered. See point on 'Website Configuration' in '[Installing Application Component](#)' section below.

7. Click Next. A ‘Select Destination Folder’ will appear. Here you can select the destination folder to install the Control Room application files.

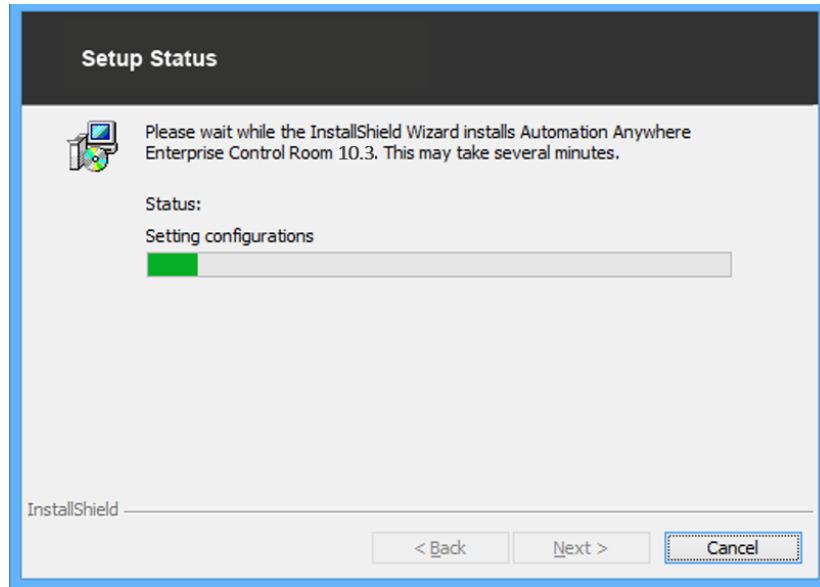
**Note:** By default, Control Room will be installed in C:\Program Files (X86) \



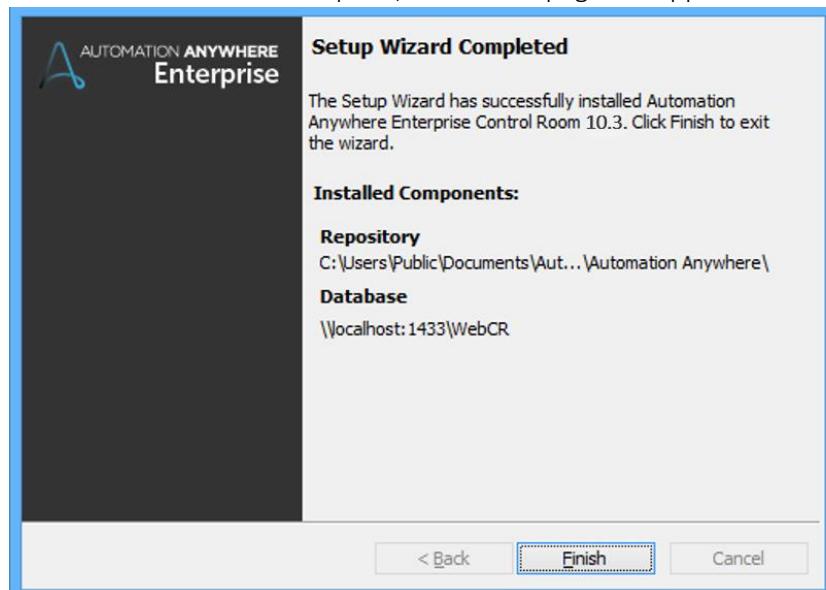
8. Click Change if you want to change the destination folder.
9. Click ‘View Disk Space’ to view the disk space availability.
10. Click Next. A ‘Ready to install the Program’ page will appear. Click ‘Install’ to proceed.



11. Click Install to proceed with the installation.



12. Once the installation is complete, the 'Finish' page will appear.

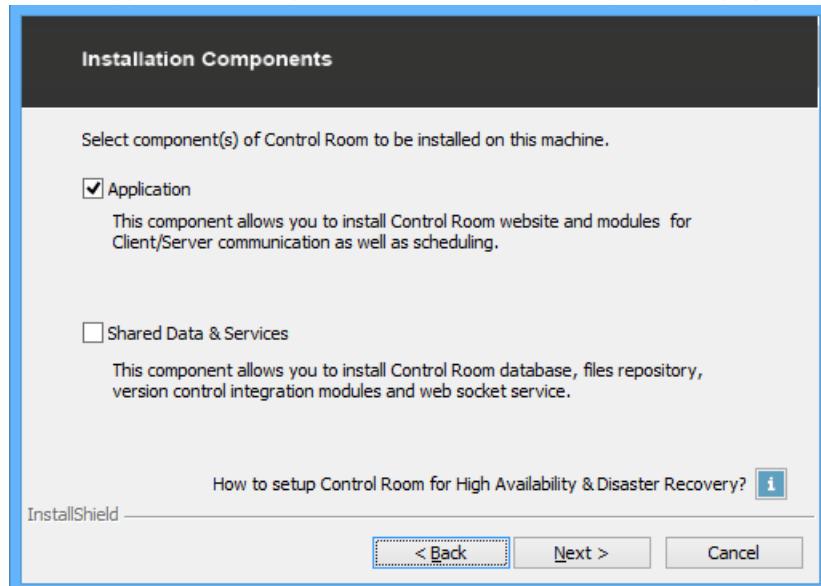


13. Click Finish to exit the setup.

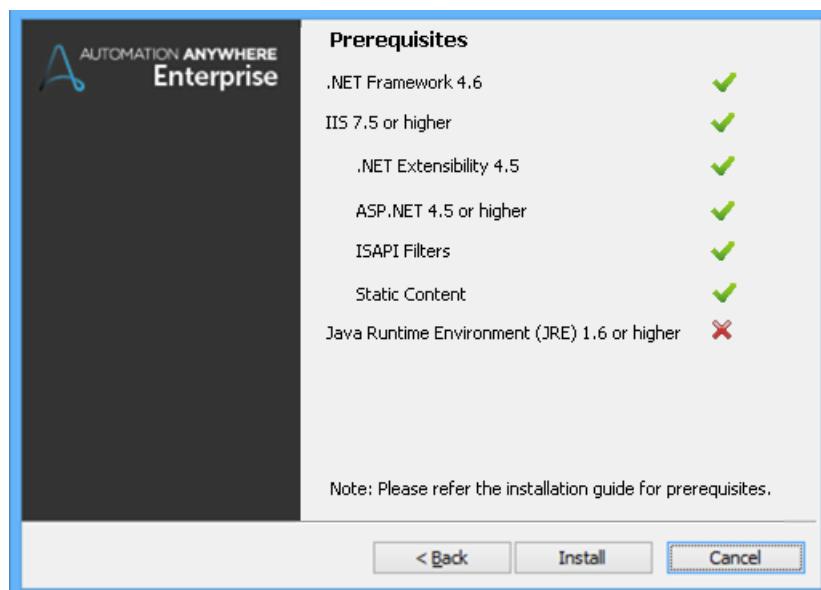
### 3.6.2 Installing Application component

**⚠ Important:** In Distributed Installation mode, all Control Room components (the Application and the Database layer) should be in one domain. Additionally, it is recommended that all IIS should have same version of JRE installed i.e. either JRE with 64 bit or with 32 bit.

- Once the 'Shared Data & Services' component is installed, run the setup on a machine where Application component needs to be installed.
- Select 'Application' component in 'Installation Components' page.

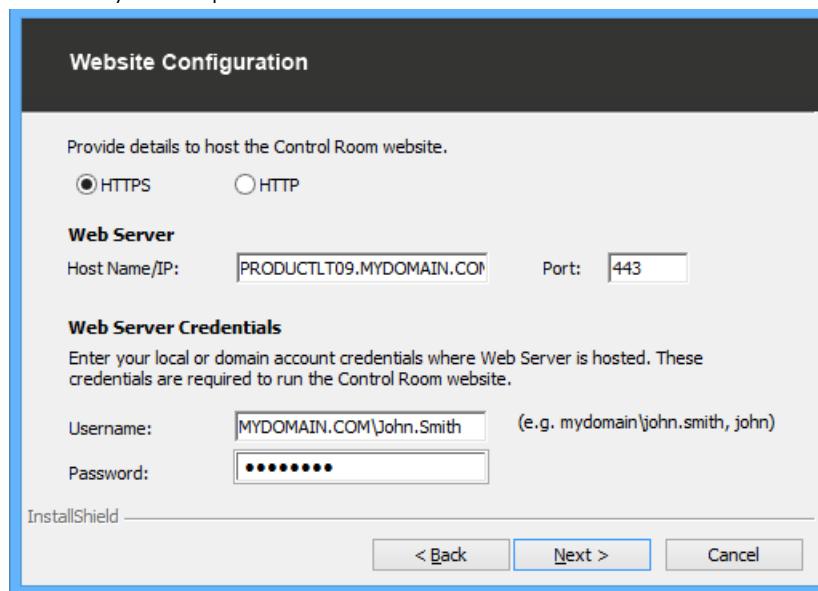


- Click Next. If any of the pre-requisite is not met, you will be displayed the Prerequisites window.



**Note:** An mark indicates that the component is not installed.

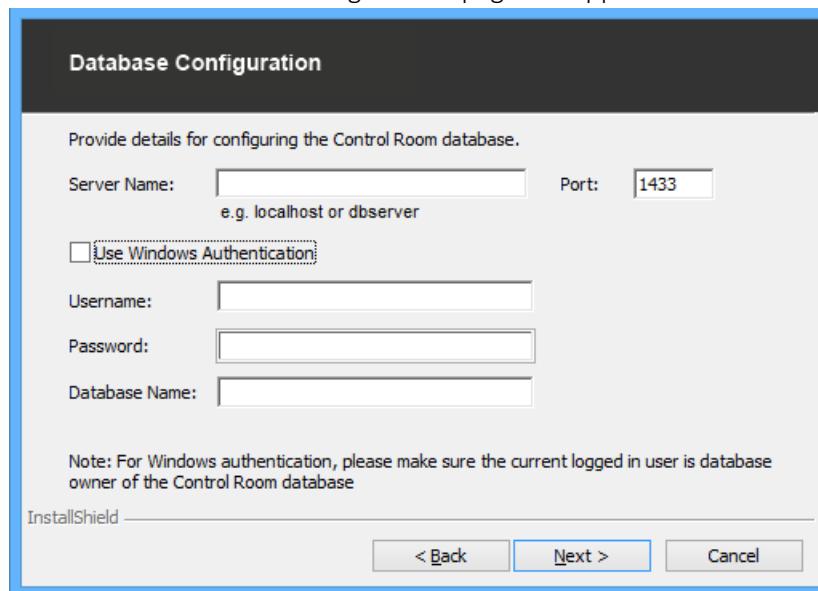
4. If all components are present, you will be displayed the ‘Website Configuration’ page wherein you can provide details to host the Control Room website.



5. Select ‘HTTP’ or ‘HTTPS’.  
If you select ‘HTTPS’, you must select the certificate
6. Key in your Web Server Hostname; an IP or Server name.
7. Key in Web Server Port.
8. Input your Web Server Credentials. Ensure to append the domain name, when configuring the Control Room in a multi-domain environment.

**Note:** These credentials are required for an Account with administrator privileges. These will be your Windows credentials.

9. Click Next. A ‘Database Configuration’ page will appear.



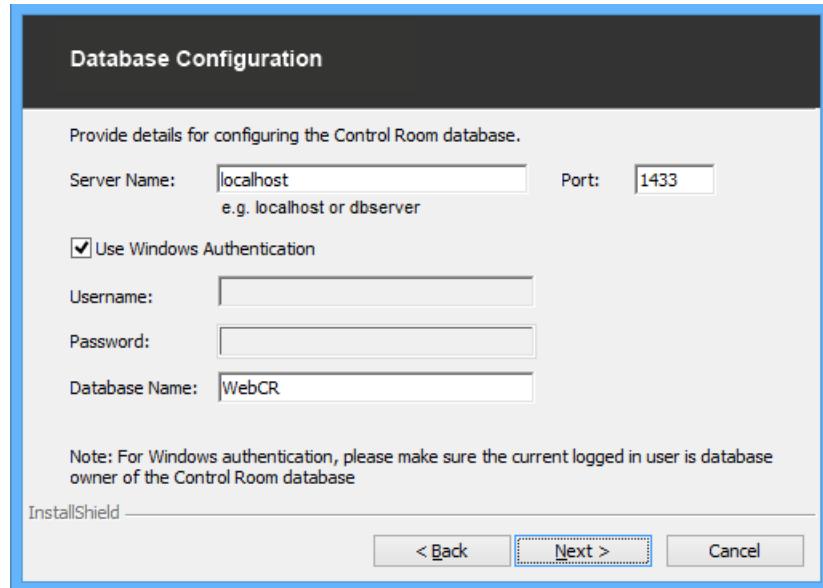
10. Key in the port number. By default, it is set to 1433 for Microsoft SQL Server.

**Note:** It should be between 1024 and 65535. Change the port if it is already in use.

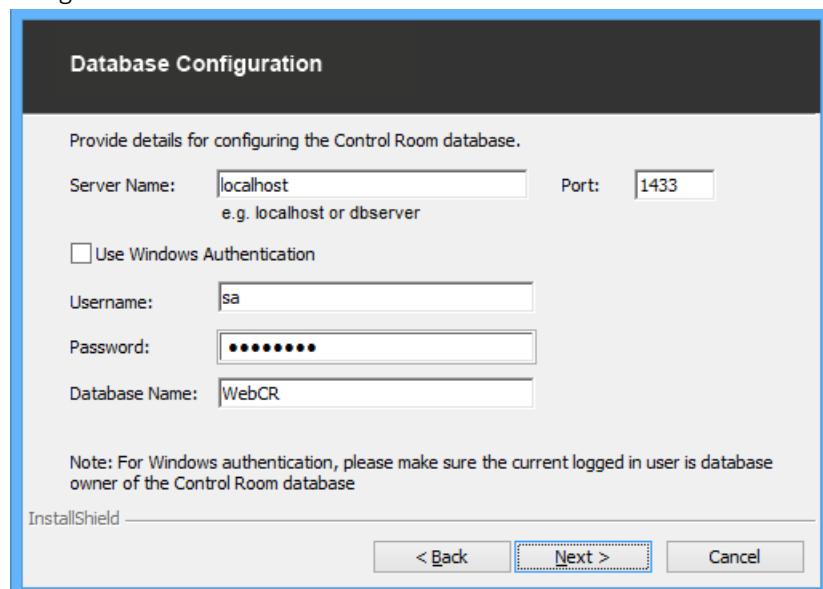
11. Select the ‘Database Administrator’ type to create an account to access the Control Room database.

- a. Select the option **Use Windows Authentication** if you have configured Windows users to an existing instance of the SQL Server. Here, the Username and Password fields are disabled. You simply have to input a Database Name.

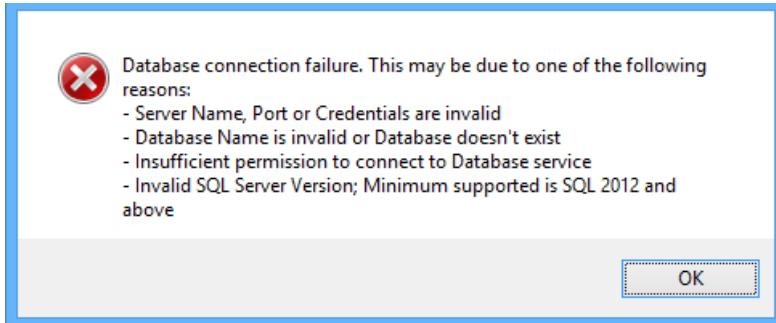
**Note:** Ensure the database user defined for authentication is also the owner of the Control Room database.



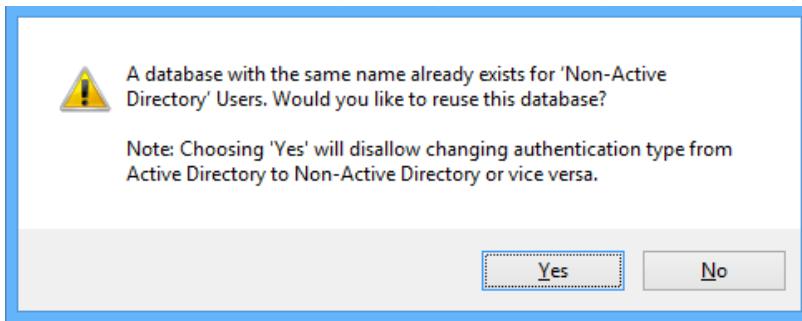
- b. Key in the Username, Password, and Database Name to connect to the SQL Server using the default database admin credentials.



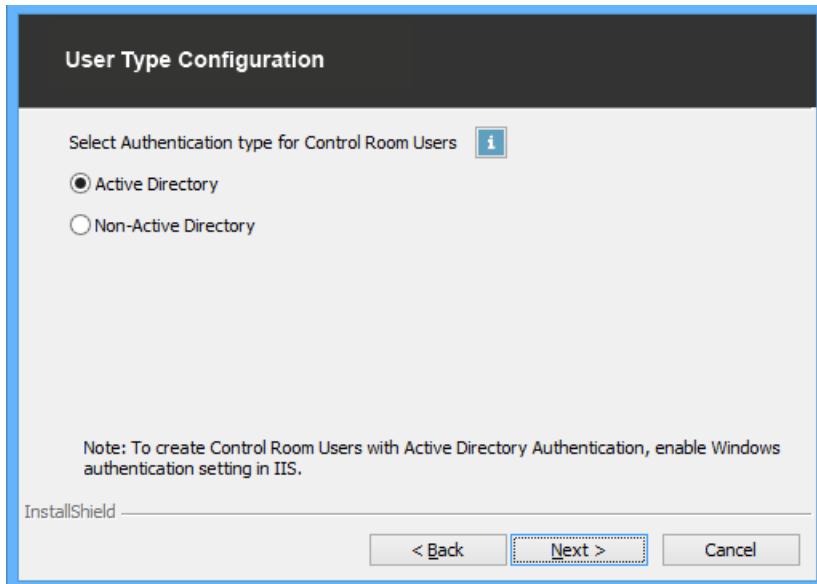
- If there is a connection error to database, you are displayed:



- If the database name already exists, you will be displayed a warning.



10. Click Next. A 'User Type Configuration' page will be displayed. Select User Type to configure in Control Room. The Control Room database can be configured to allow creating either Active Directory (AD) users or non-AD (Non-Active Directory) users.

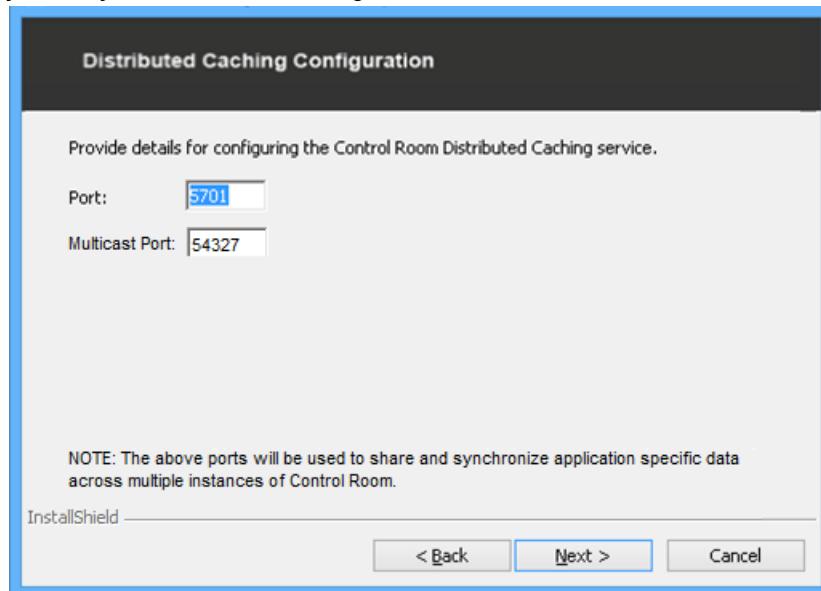


The next step involves setting up of a default port that will be used to share and synchronize application specific data across multiple instances of the Control Room in the 'Distributed Caching Configuration' window.

**Note:** The default port for sharing application specific data is set to '5701' and for synchronization, the Multicast port is set to '54327'.

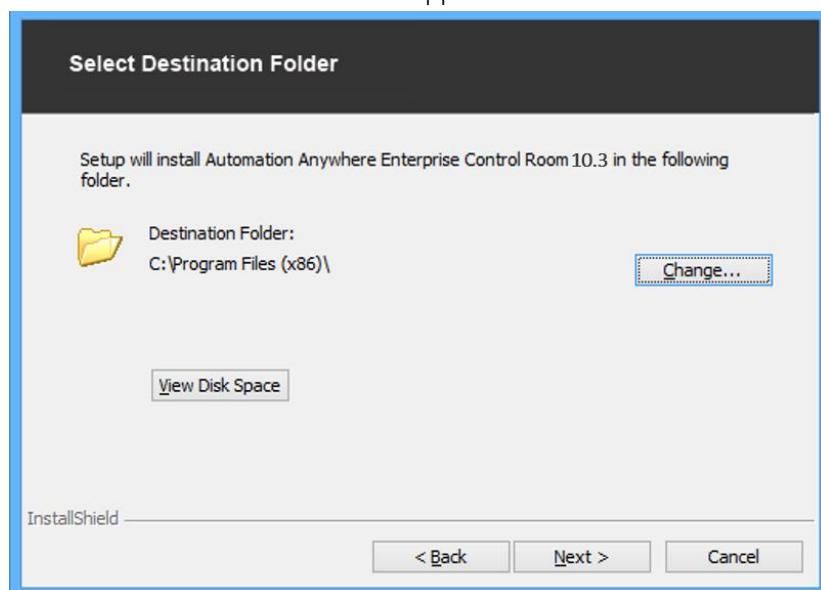
**Tip:** Ensure to unblock the Multicast port by writing inbound/outbound rules in your

firewall for distributed caching services.



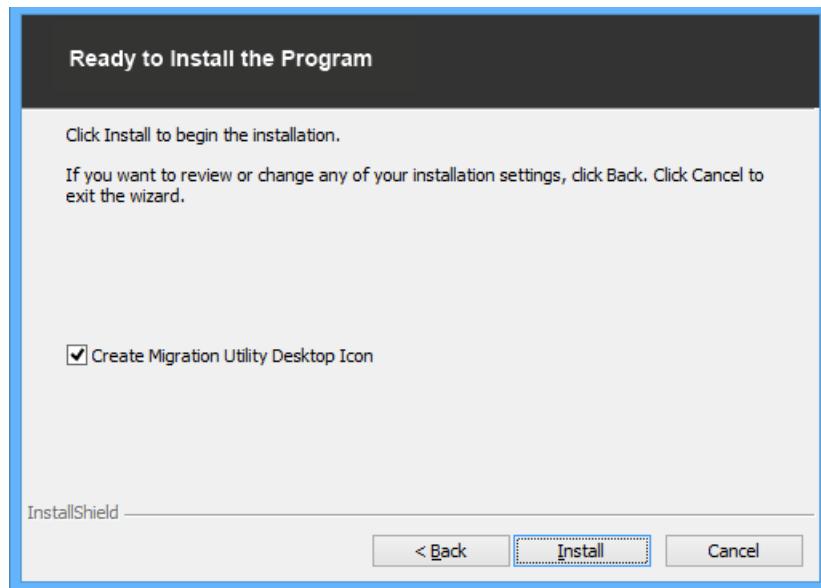
**⚠️ Important:** Ensure all Control Room instances are being installed within the same Subnet mask.

11. Click Next. A 'Select Destination Folder' will appear. Here you can select the destination folder to install the Control Room application files.



12. Click Next. A ‘Ready to install the Program’ page will appear.

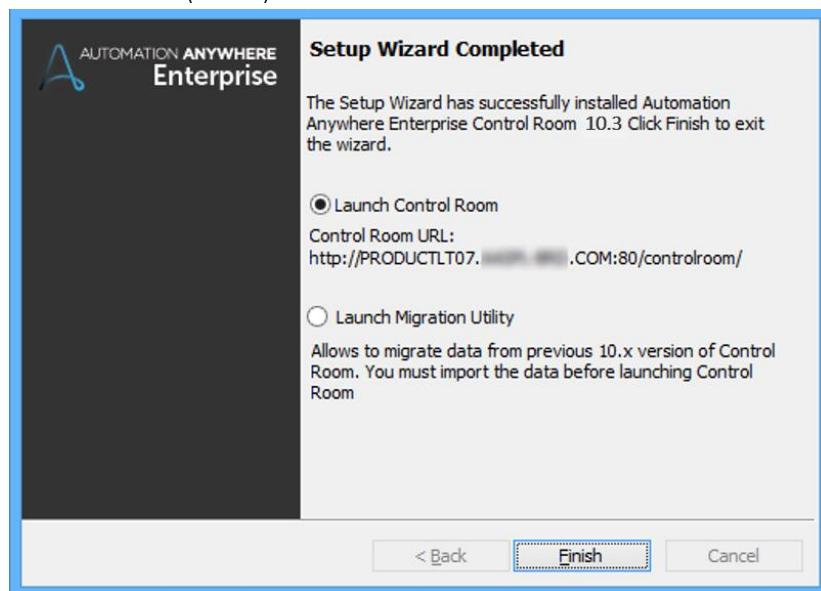
**Tip:** Select the option for creating a shortcut to access the Automation Anywhere Enterprise Data Migration Utility to enable you to migrate data from an earlier version of Control Room database.



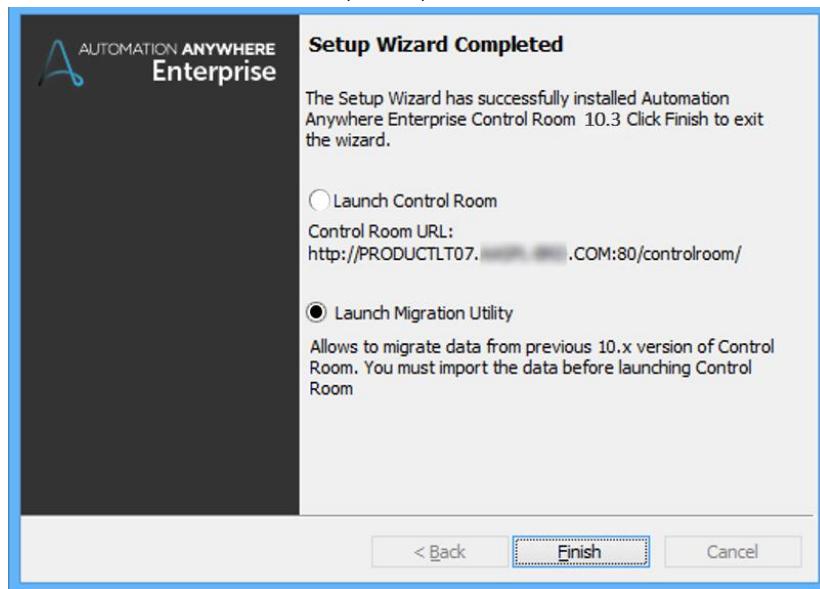
13. Click ‘Install’ to proceed.

14. Click Finish to complete the installation process.

- You can opt to launch the Control Room if no data needs to be migrated from an earlier version (10.x.x) of Control Room.



- b. Opt to launch the Automation Anywhere Data Migration Utility to migrate data from an earlier version (10.x.x) of Control Room database.



**Note:** The Control Room application will launch in the default browser if you opt to 'Launch Control Room'

**⚠ Remember!** Note down the Control Room url as you will require the same post migration to finish the process of configuring Control Room settings.

You can begin using the Control Room by creating a Control Room administrator. Refer the section on [Launching Control Room for initial use](#).

### 3.6.3 Setting up Https Site Binding

Follow below steps to bind Control Room website with secured (SSL) server certificate. This is prerequisite for configuring Control Room in HTTPS mode.

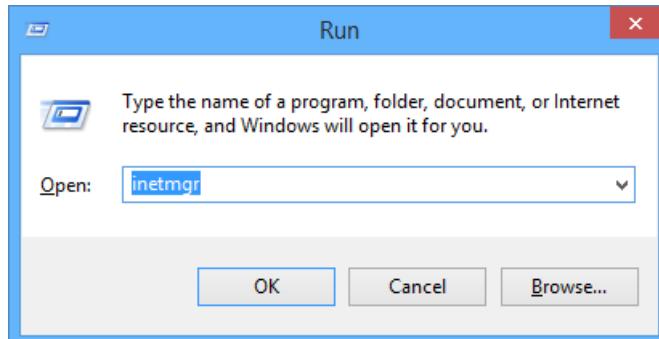
**Note:** For Control Room that is setup with multiple application layer (IIS), these steps should be repeated for each application layer.

**⚠ Important:** Ensure the server certificate is available to enable HTTPS site binding.

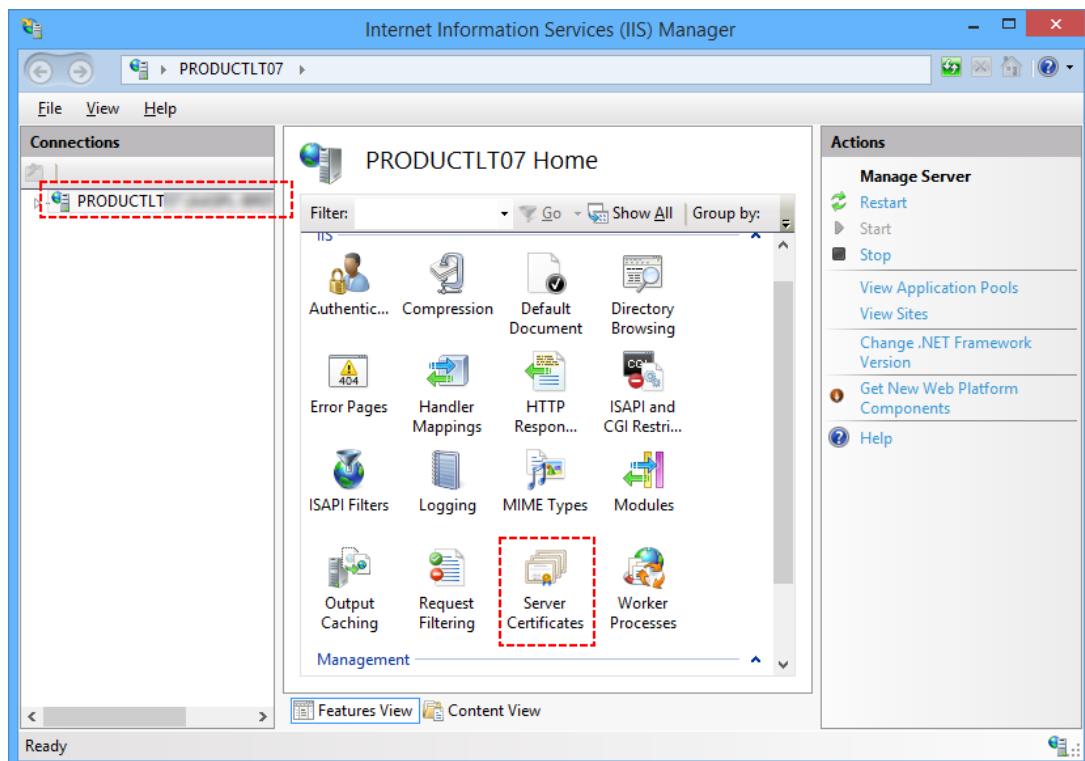
### A. Importing a Server Certificate

To import a Server Certificate using the Internet Information (IIS) Manager, you can do the following:

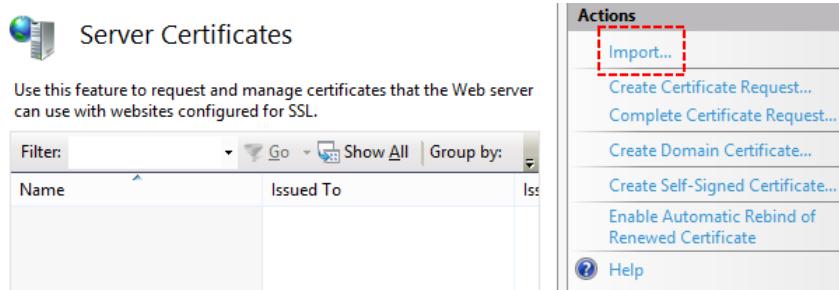
1. Invoke the IIS Manager using the short cut **Windows key + Run > "inetmgr"**



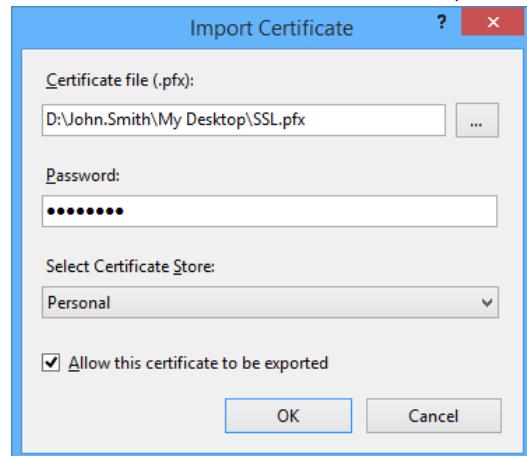
2. Go to the root directory and select 'Server Certificates' in IIS panel in 'Features View' as shown:



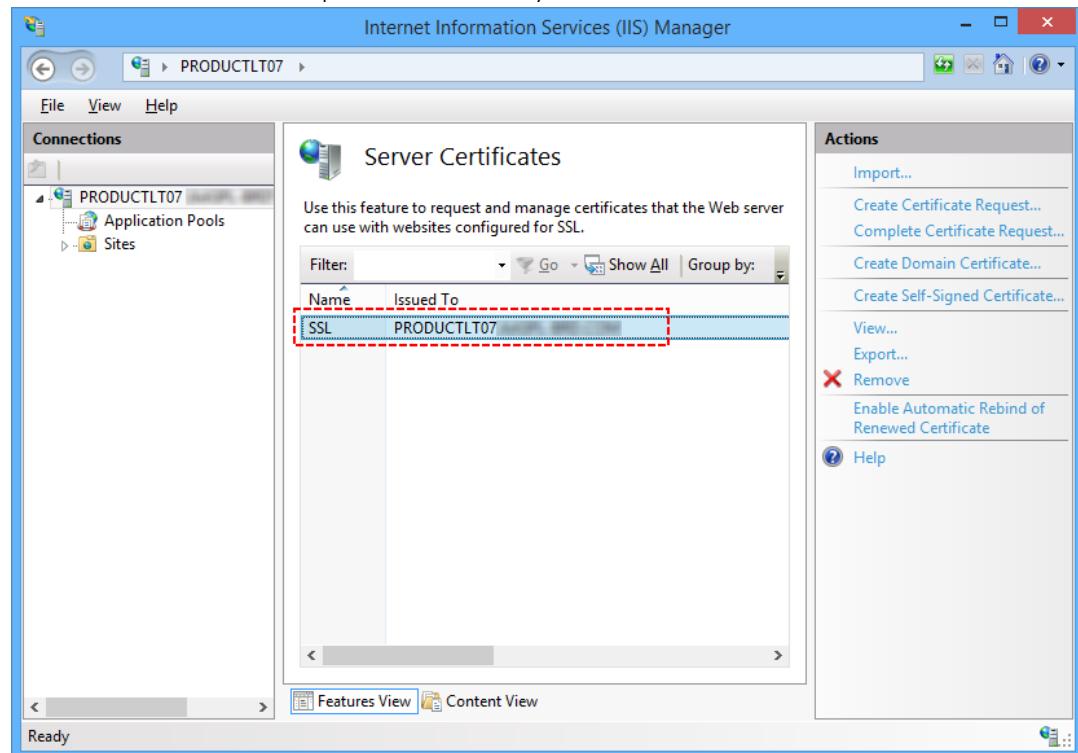
3. In the 'Server Certificates' window, click on 'Import' link to import an SSL Certificate.



4. Select the certificate and fill in the required details as shown:

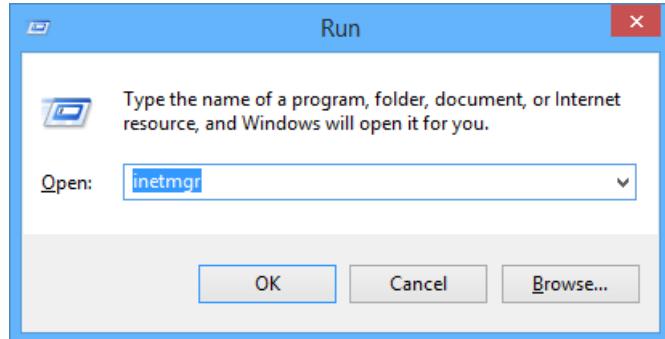


5. Click OK.
6. The server certificate is imported successfully:

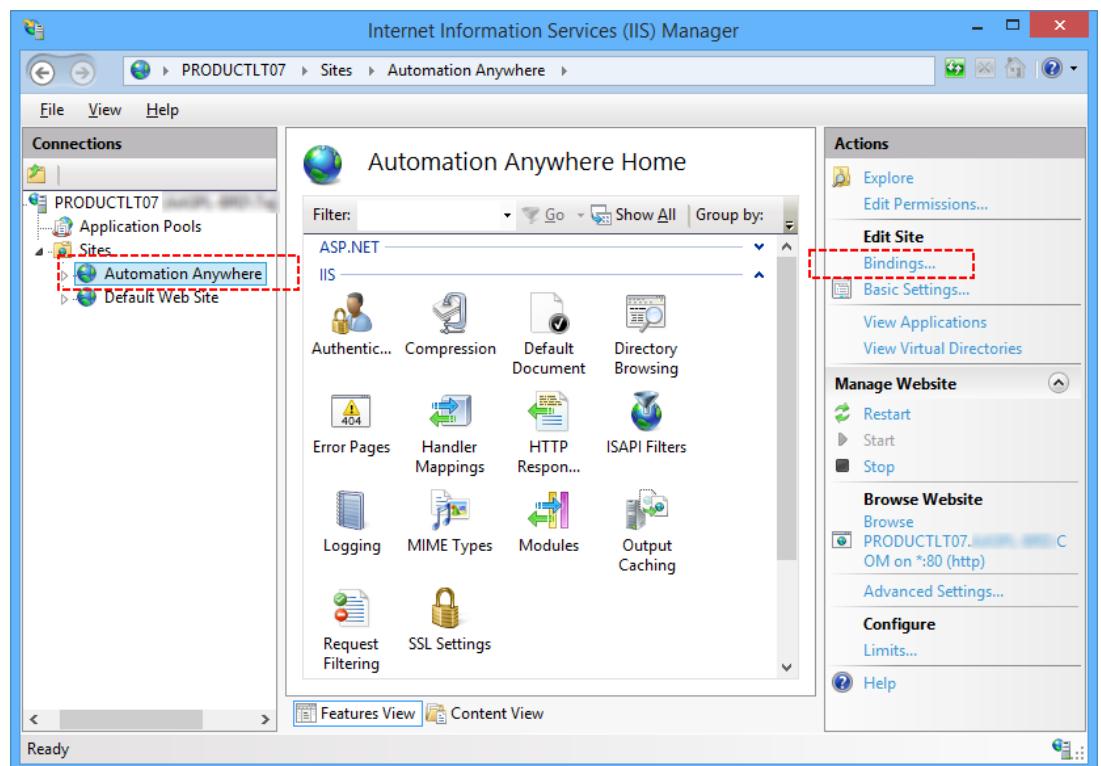


## B. Site Binding

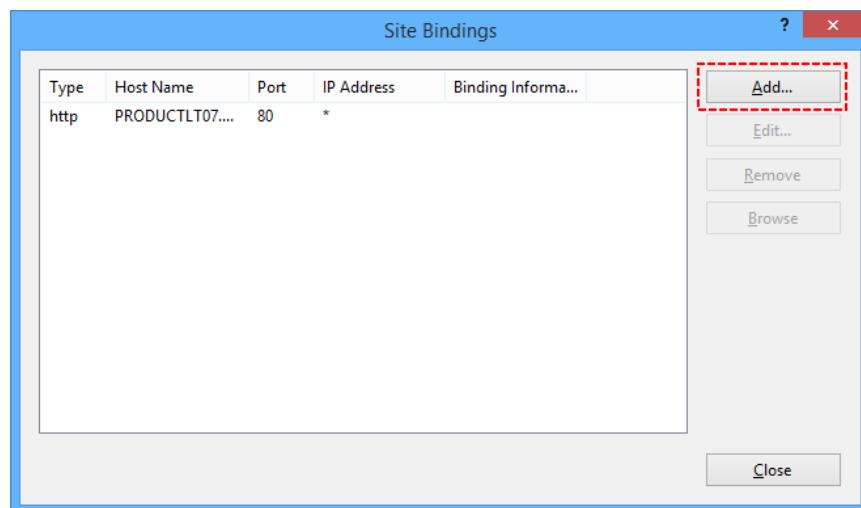
Site Bindings can be setup using the Internet Information Services (IIS) Manager, which can be invoked using the short cut **Windows key + Run > “inetmgr”**



1. In the Internet Information Services (IIS) Manager, select “Automation Anywhere” under ‘Sites’ and click on ‘Bindings...’ link in the right panel. (marked in image below):

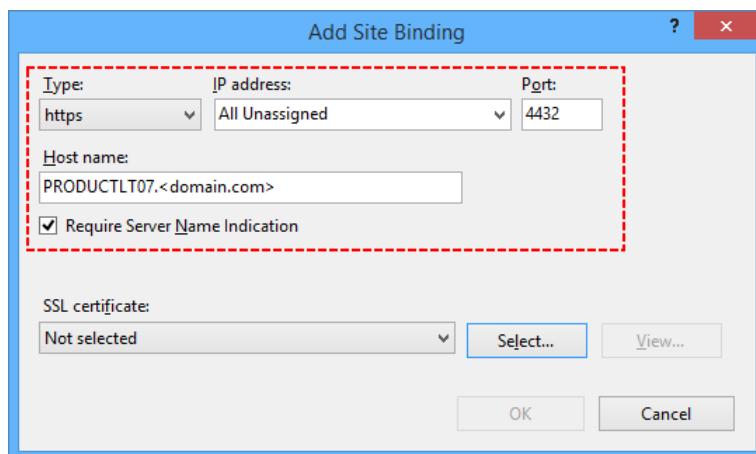


2. Click on Add button.

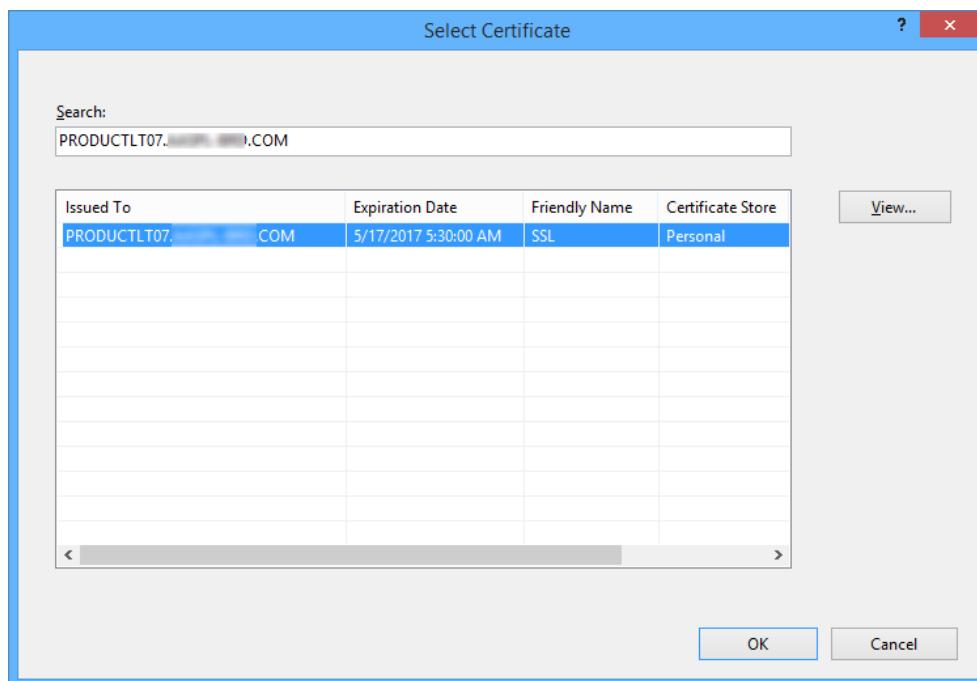


7. In the Add Site Binding window, select Type “https”, Host name. Input any *Port other than 443* as this is the default port for https.
8. Provide the Hostname. Ensure that this is the same as mentioned in Server Certificate.

**Note:** If the Host name should include ‘Server Name’ enable the ‘Require Server Name Indication’ option.



9. ‘Select’ the SSL certificate.



**Note:** The certificate will be visible only if it has been imported in IIS > Server Certificates.

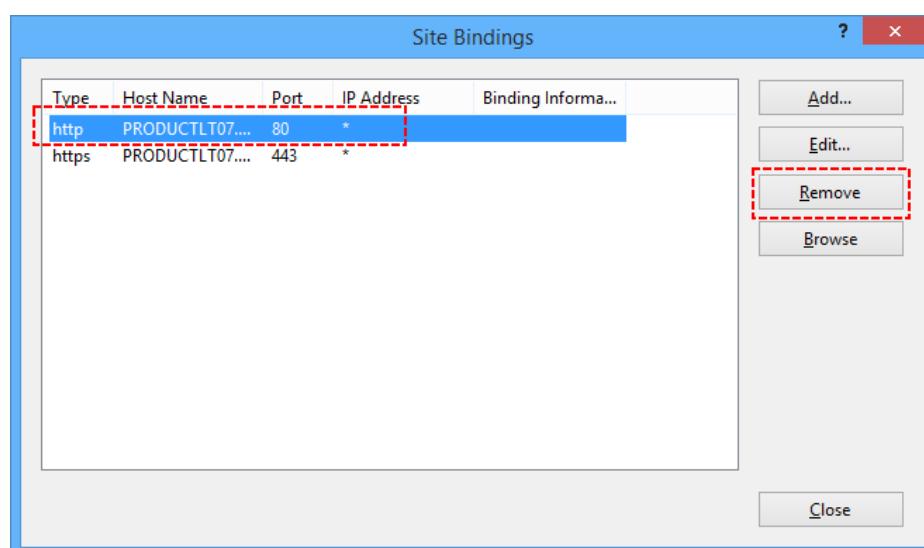
Refer the [steps](#) given at the beginning of this section to know how to import certificates.

10. Click on OK once done.

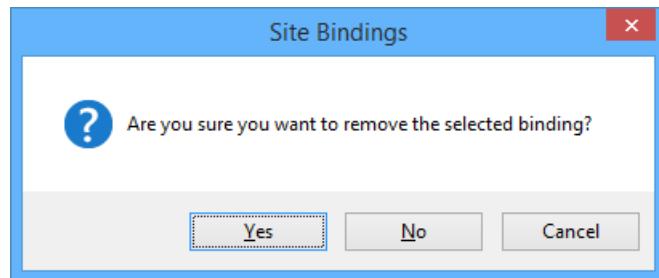
### C. Editing Https Binding

If you have an existing http binding, you will now have to delete it to keep a single binding.

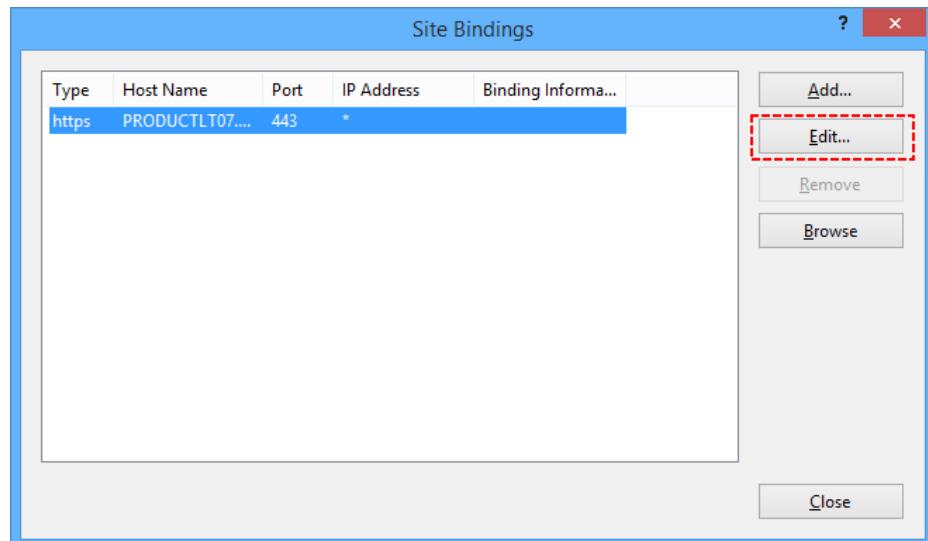
1. To delete existing http binding, go to IIS Manager and select ‘Bindings’ for ‘Automation Anywhere’ website.
2. Select the ‘http’ site binding and click on ‘Remove’.



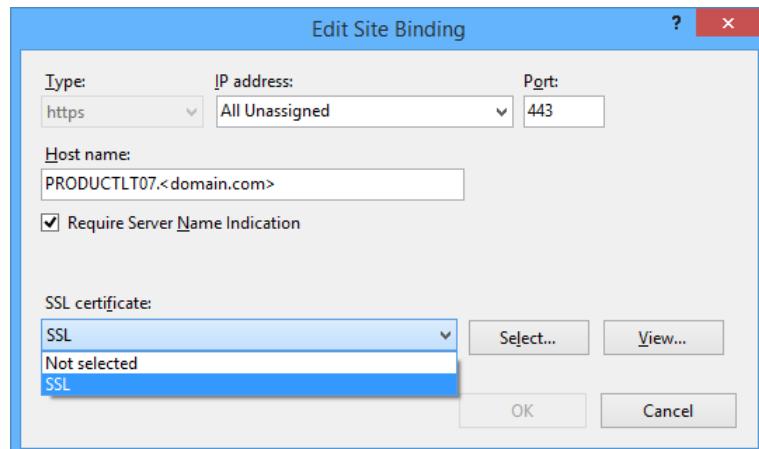
3. Confirm:



4. Now, select the 'https' site binding and click on 'Edit'.



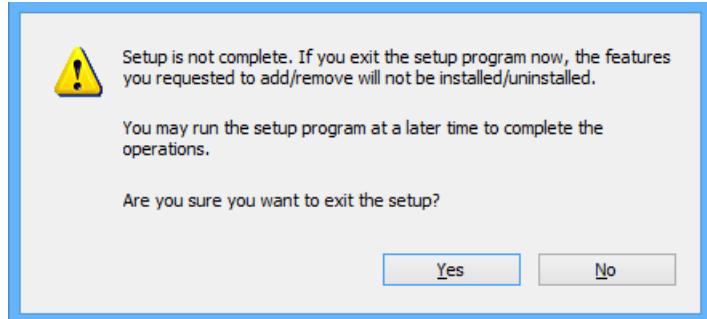
5. Select the website configured for https and edit the port; specify 443 in the Edit Site Bindings window.



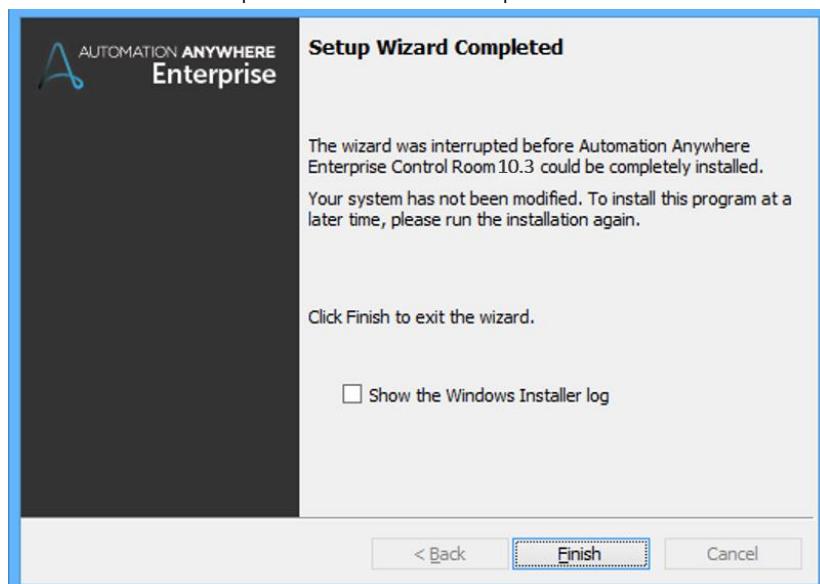
11. Save Bindings & restart Application from IIS Manager.

### 3.7 CANCELLING THE SETUP AT ANY POINT IN TIME

1. Click 'Cancel' at any point in time during installation.
2. Click 'Yes' to exit the current installation.



3. Click 'Finish' to complete the cancellation process.

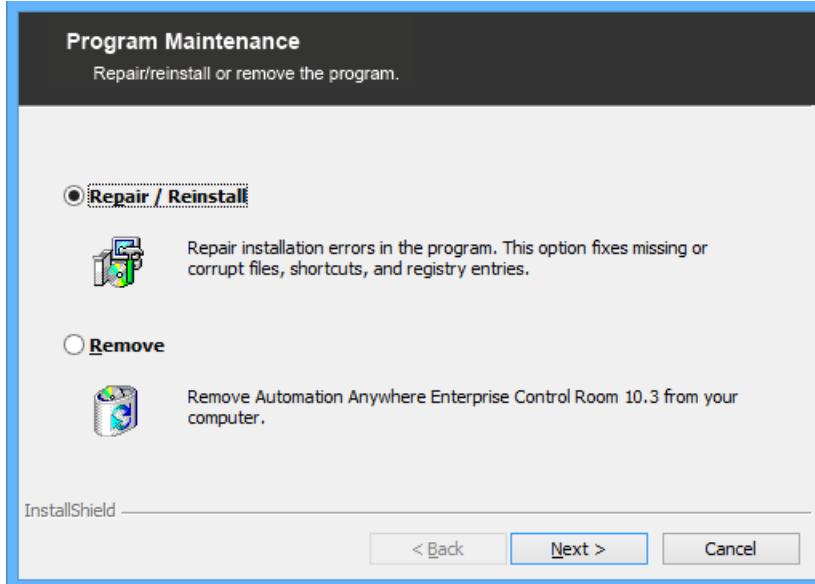


**Note:** To view the Windows installer logs, select the 'Show the Windows Installer log' option.

### 3.8 REPAIRING/REINSTALLING THE CONTROL ROOM

If for any reason you need to repair/reinstall the Control Room that you had setup earlier, run the installation setup in admin mode.

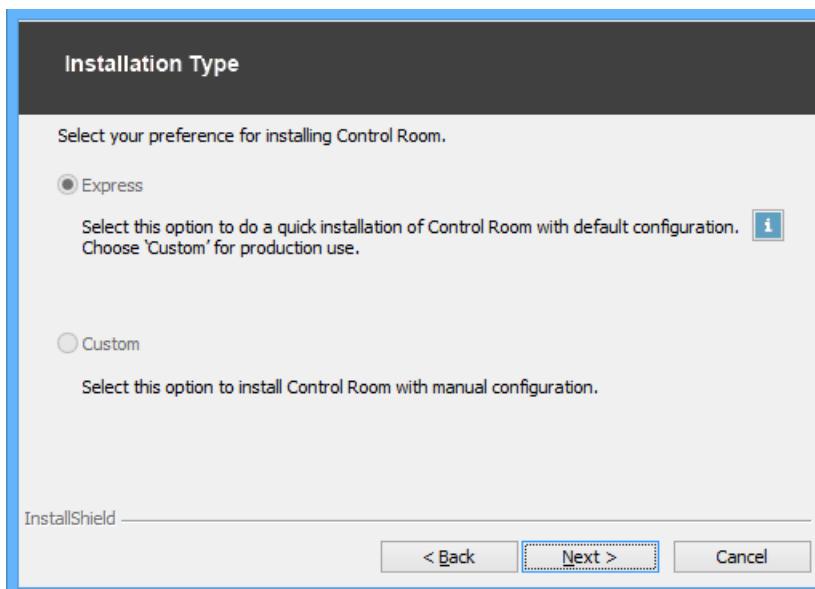
Select ‘Repair/Reinstall’ option.



**Note:** Use Repair/Reinstall if you want to fix missing or corrupt files, registry entries or update any of the existing configuration settings.

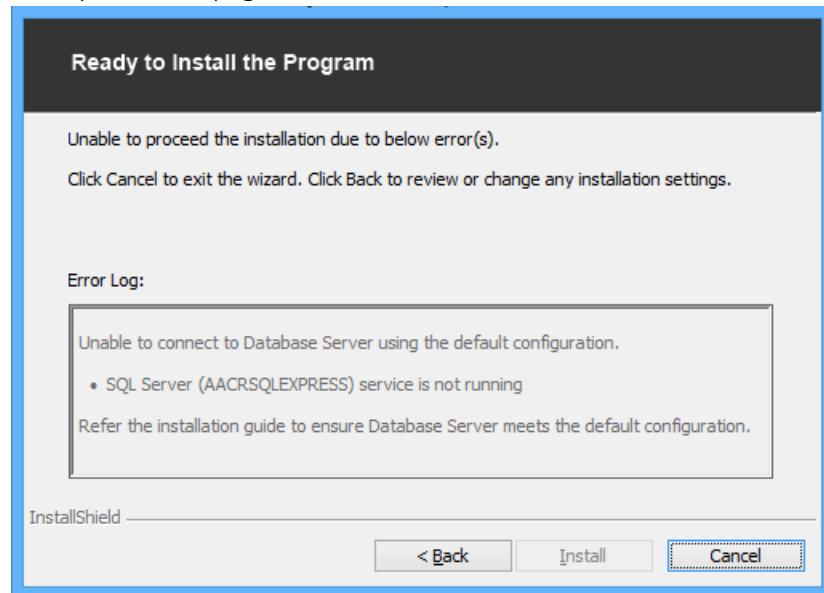
The process of repair or reinstall is similar to installation with a few differences:

The ‘Installation Type’ will default to the previous mode of installation. There is no option to switch from ‘Express’ to ‘Custom’ and vice versa.

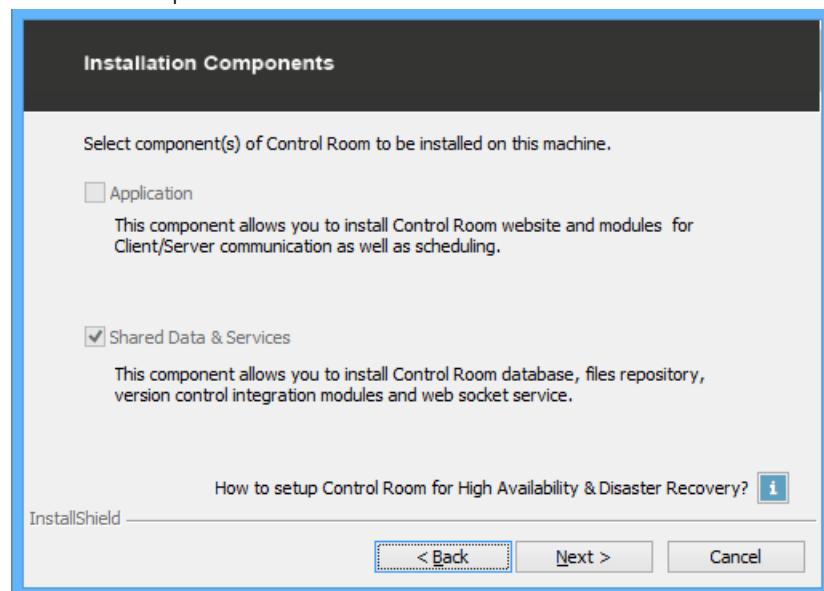


- In Express mode, the default configuration set previously will be reused. If the default configuration has changed before repair/reinstall, an error log will be displayed in

'Ready to Install' page.



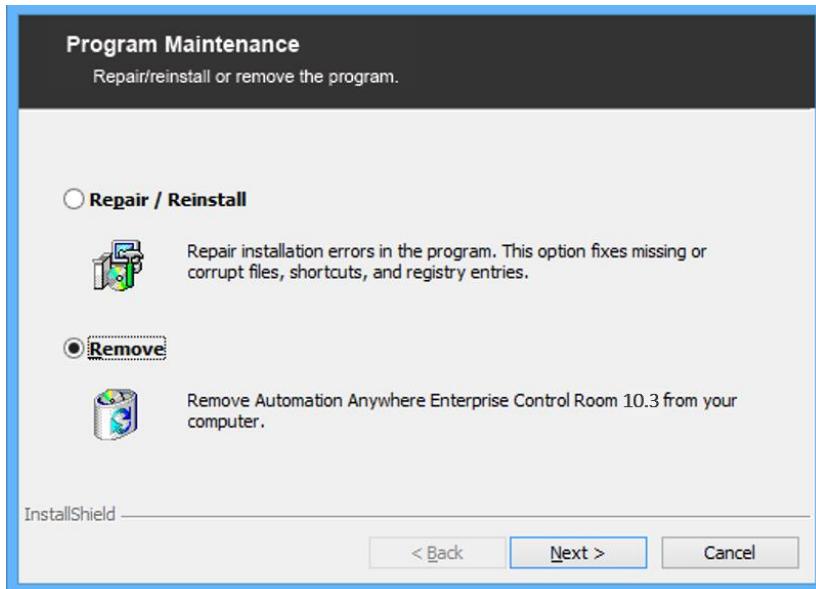
- In Custom mode, there is no option to switch from 'Application' to 'Shared Data & Services' component and vice versa.



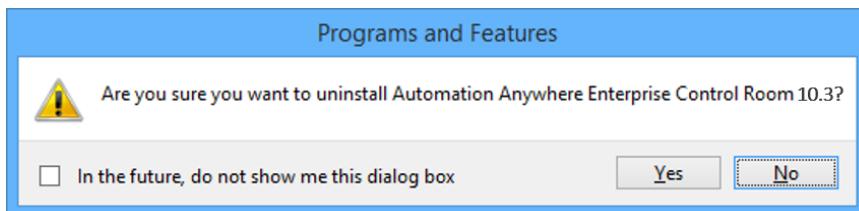
Fields that require input are pre-filled with the last saved inputs.

### 3.9 REMOVING THE CONTROL ROOM

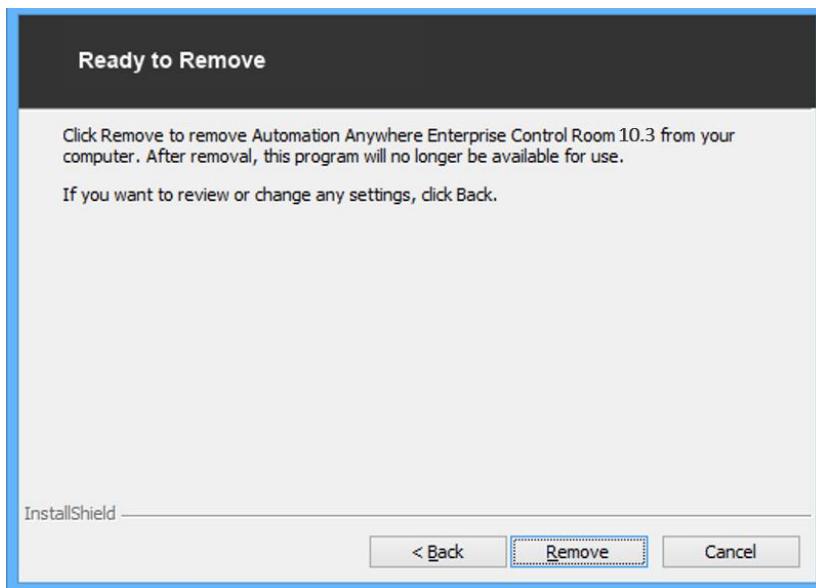
1. Run the installation setup in admin mode.
2. Select 'Remove' to uninstall the Control Room from your machine.



3. Alternatively, open Control Panel > 'Programs and Features', select 'Automation Anywhere Enterprise Control Room 10.2.0' and click Uninstall.

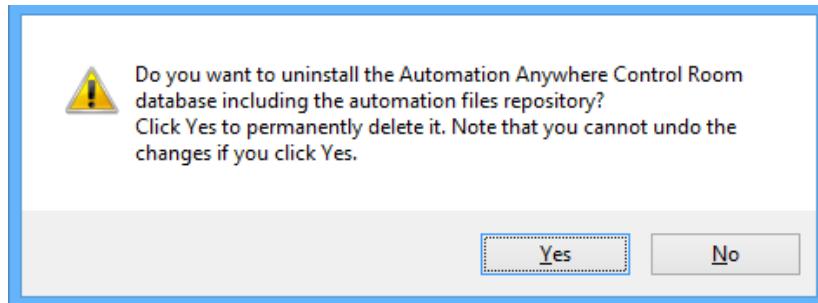


4. Click Yes to uninstall.
5. On clicking Next, the 'Ready to Remove' page is displayed.



6. Click Remove to uninstall Control Room.

**Note:** If Express mode was selected during installation then the Remove option will prompt a confirmation whether to remove the Control Room database and physical files repository.

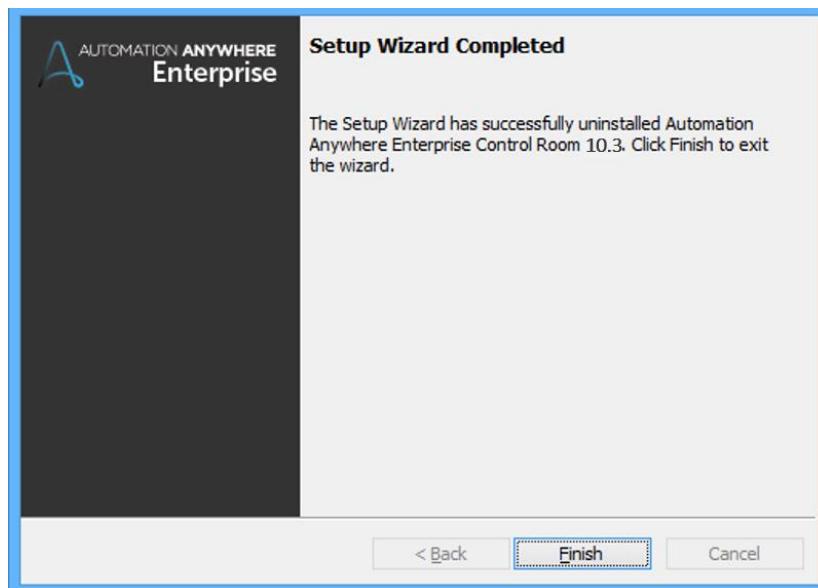


- Click Yes to delete it permanently, 'No' to ignore deletion.

If Custom mode was selected during installation, then the Remove option will remove the installed component – Application or Shared Data & Services or both.

**Note:** You can opt to remove the Control Room database from the Database Management System manually as it shall not be uninstalled.

7. Click 'Finish' when done.



## 3.10 LAUNCHING THE CONTROL ROOM FOR INITIAL USE

The Control Room launches in default browser. You must create a Control Room administrator before you can begin using the Control Room. Depending upon the user type selected during installation i.e. Active Directory user or Non-AD user, Control Room Admin creation differs.

### 3.10.1 Creating the Control Room Administrator

**For Active Directory Users, the Control Room Admin creation entails:**

1. Verifying the Username within the Domain.
2. Providing Windows credentials, which shall be used by the Control Room Admin to login to the Control Room.
3. Email for sending a link for user verification.

4. On submitting the information, a confirmation is denoted with a Login screen.

5. Click on 'Login' to configure the Credential Vault.

**For Non-Active Directory Users, the Control Room Admin creation entails:**



Sales hotline:  
Toll Free (USA):  
1.888.484.3535  
  
International Customers:  
1.408.834.7676

PO Box 24073,  
San Jose, CA 95154-4073  
  
Tel: 408.834.7676  
Fax: 1.408.834.7671

url:  
automationanywhere.com  
  
email:  
sales@automationanywhere.com

1. Inputting credentials – Username, First Name (optional), Last Name (optional), email, and password for the Control Room login.

**Control Room Admin Creation**

The form contains the following fields:

- Username: John Smith
- First Name: John
- Last Name: Smith
- Email: john.smith@automationanywhere.com
- Confirm Email: john.smith@automationanywhere.com
- Password: (Redacted)
- Confirm Password: (Redacted)

**Next**

2. Providing Q&A for enhanced security - Input your choice of security questions and their answers that will be used to verify the 'Admin' identity if the password is forgotten:

**Control Room Admin Creation**

### Security Questions

Provide three security questions of your choice and their answers.

Username: John.Smith

1. **\*Question?**  
\*Answer
2. **\*Question?**  
\*Answer
3. **\*Question?**  
\*Answer

**Back** **Submit**

**NOTE:** These questions will be asked to verify your identity in case you forget your password.

3. A confirmation is denoted with a Login screen.

**Confirmation**

Admin 'John Smith' has been created successfully. Click 'Login' to get started with Control Room.

**NOTE:**

- You will be logged into Control Room automatically in case you have installed Control Room in AD environment.
- You will receive an error in case you are not the Admin.

**Login**

4. Click on 'Login' and enter the Control Room admin credentials.

**Note:** You may have to assign a Control Room license after this step, if you are doing a reinstall

and your existing license has expired. Refer '[Installing Control Room License](#)' section for details.

- Now you can proceed to configure the Credential Vault.

### 3.11 CONFIGURING THE CREDENTIAL VAULT

On login to the Control Room **for the first time**, the Control Room Admin must configure the Credential Vault to create and store credentials that are required in automation tasks.

In order to connect to this Credential Vault, a 'Master Key' is used.

**Important:** An Admin must generate the master key and keep it in a safe place for future reference.

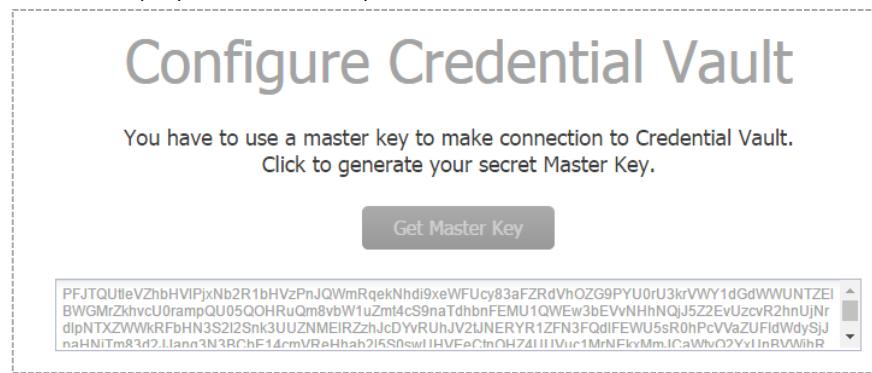
**Caution:** Ensure you **do not lose the key**. If you do, you will not be able to create another instance of Credential Vault or even delete one. In fact, you will not be able to access the Vault or the Control Room.

To configure your Control Room's Credential Vault, follow the steps mentioned below:

- Login to Control Room as Admin. A 'Configure Credential Vault' page is displayed.
- Click the 'Get Master Key' button to generate the master key, which allows you to connect to the Credential Vault.



- You are displayed a master key



- Select either 'Express' or 'Manual' mode of connecting to the Vault.

- Use the 'Express' mode if you want the Control Room to store the master key and automatically connect to the Vault.

**Note:** This mode is less secure and not recommended for Production environment.

## Configure Credential Vault

You have to use a master key to make connection to Credential Vault.  
Click to generate your secret Master Key.

[Get Master Key](#)

```
<RSAKeyValue>
<Modulus>w7Ix5cqKjbL2CLGbhjQEXAhbBN6rsiOpX8p+4zjALnJsLeVp/U4wtJKf16OjU1v/zqAh0w5uHYaqe2o9rYA
oINx5bjcXIUqupC1aOlwvIuaP3ifAX96dWlGS3MMiYUvX7P1NiaERMidVA9ldSTYDseukdc4hSxregCvNLfhheKa9vI
RRV/vNM2nvFAK1iGS8VRD5RMMiPX11naR5TnMik>.I.IhvR@o@O@48qFnhva257vH1VVWxViv/hnXn@NWshk@Rnm
```

- Express Mode** System will store your master key and auto connect to Credential Vault. 
- Manual Mode** You manually save the master key at a safe place and enter it when connecting.

- b. Use the ‘Manual’ mode if you want to secure the master key by yourself and use it to connect to the Vault manually.

**Note:** This mode is more secure and recommended for Production environment.

## Configure Credential Vault

You have to use a master key to make connection to Credential Vault.  
Click to generate your secret Master Key.

[Get Master Key](#)

```
<RSAKeyValue>
<Modulus>w7Ix5cqKjbL2CLGbhjQEXAhbBN6rsiOpX8p+4zjALnJsLeVp/U4wtJKf16OjU1v/zqAh0w5uHYaqe2o9rYA
oINx5bjcXIUqupC1aOlwvIuaP3ifAX96dWlGS3MMiYUvX7P1NiaERMidVA9ldSTYDseukdc4hSxregCvNLfhheKa9vI
RRV/vNM2nvFAK1iGS8VRD5RMMiPX11naR5TnMik>.I.IhvR@o@O@48qFnhva257vH1VVWxViv/hnXn@NWshk@Rnm
```

- Express Mode** System will store your master key and auto connect to Credential Vault.
- Manual Mode** You manually save the master key at a safe place and enter it when connecting. 

- c. Whether using ‘Express’ or ‘Manual’ mode of connecting to the vault, it is important to copy and paste the master key that you had secured earlier:

## Connect to Credential Vault

Enter Credential Vault master key that you generated while installing control room.

```
PJQTQUiteVZhbHVIPJxNb2R1bHVzPndmamY2d29lZm85cWdSNdNTxEvbHVgZUNsTH5OT4NjJTS0hpY2FORE
1x1FnSTZNTkRzcU04VTJGOHVieJoSkmPvnV6R1ZwbW1Scn0zaVYU2ICT01S2En9NEV3VHZWtjRZQ1F0enR
kr2RjeFppMS9nOTduS2QwZHzsWEfTno4UEZ5ZTFZM0VrWk53UW1M2Vyc0xkVWVdaVTIXK0wxRGt0eEVpcmFV
M1Y3WwpNN1k5TGHVzh6NklRkhklnJ0UHyvCErZeHvxafVEIEHNLSFdzejdQKVNL0VgbfU1R
1hmT0Z5dkZlV2k5RGPgLamM3cVlpLZEkoefFzbG21KzQ3Tp3dW1tSUZSWXF0d2LMxc2WKNJNDNMRk96RpR
Y3pQOVRZSJF2bDVkYTJodXRQTV1wYjgvREhYMDg2Qk5ZdmxnRVBRNTJOU2(Gdz09PC9Nb2R1bHVzPjxFeHBv
```

[Submit](#)

 **Important:** Ensure you do not modify the master key in any manner as you cannot connect to the Control Room with a key that is modified and considered invalid (see

message):

## Connect to Credential Vault

Enter Credential Vault master key that you generated while installing control room.

```
PFJTQU!leVzhbHVlPjxNb2R1bHVzPndmamY2d29lZm85cWdSNDNnTXEvbHVqZUNsTHk5OTI4njTS0hpY2FORE
1xT1FhST2NTkrZcU04VTJGOHVieJoSkpmWnV6R1ZwbW1Sc00zaVYYU2lCt01SE9nNEV3VHZWTjRZQ1F0enR
KR2RjeFppMS9hOTduSzQwZHzsWEfTno4UEZ5ZTFZM0VrWk53UW1M2YYc0xkVVdaVTIXK0wxRGloEVpcmFV
M1Y3WWpNN1k5TGhUTHpkQldHVzh6NklkRkhkNnJOUHYvcER2eHVxaFURIEENHNLsFfdzejdQKVNL0VGbFU1R
1hmT0Z5dkZlV2k5RGpLamM3cWpLZEkoEfzbGZ1KzQ3Tp3dW1SUZSWXFod2LMXc2WkNJNDNMRk96REpR
Y3pQOVRZSJF2bDVKYTJodXRQTW1wVjgvREhYMGd2Qk5ZdmxnRVBRNTJOU2lGdz09PC9Nb2R1bHVzPjxFeHBv
```

Error:  
There was a problem connecting to Credential Vault. Invalid Key. Please try again.

- d. Click on 'Submit'.
5. Click on  to navigate to the '[Getting Started](#)' page.

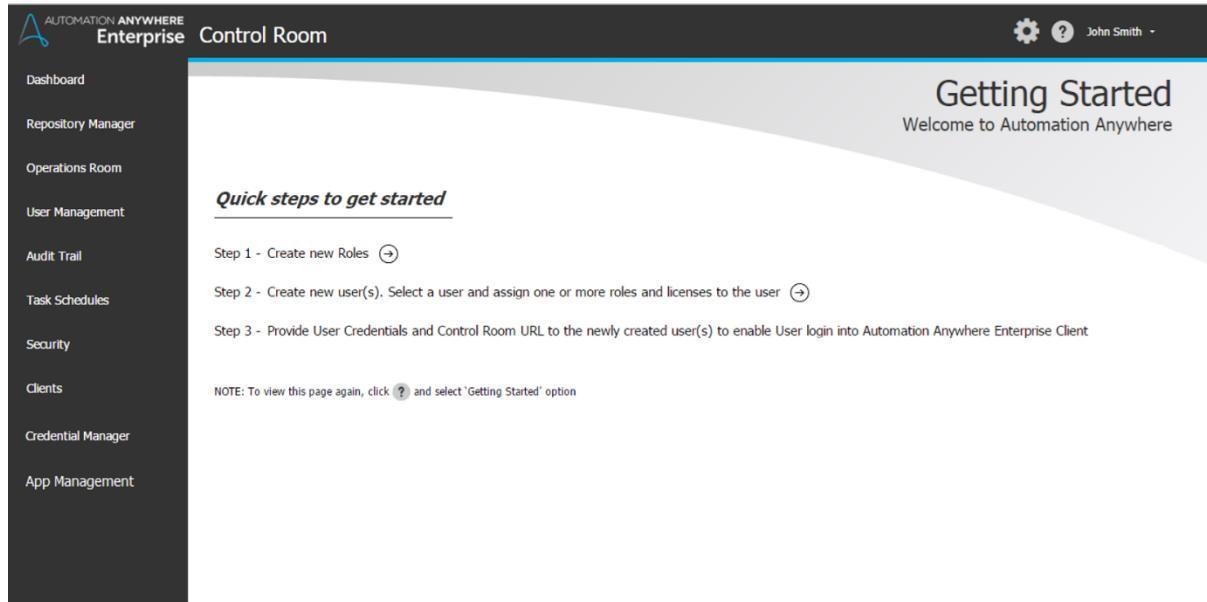
*Tip:* You can choose to switch between modes from the Control Room Settings page, if required at a later stage. Refer the section on [Control Room Settings](#) on how to switch modes.

## 3.12 GETTING STARTED

If Control Room is installed in Express mode or Custom – Standalone mode, then the ‘Getting Started’ page will be displayed upon first login of Admin account.

However, if Control Room is installed in Custom – Distributed mode, then the ‘Getting Started’ page will be displayed post configuring the Control Room Settings for Load Balancing.

The ‘Getting Started’ page that is visible to the Admin, displays quick steps on how to use the Control Room.



### 3.12.1 Configuring Control Room Settings

#### 3.12.1.1 Settings for Standalone Installation

When the Control Room is configured using the Standalone mode of installation, you can opt to update the Repository Path.

### Control Room Settings

#### Control Room Configuration

Repository Path :	<input type="text" value="D:\Automation Anywhere Files\Automation Anywhere Server Files"/>	<input type="button" value="Save"/>
-------------------	--	-------------------------------------

Before updating the path, ensure a backup copy of the repository is available at the target location. Ensure the Control Room is in maintenance mode and Clients are not connected to the Control Room when Repository path is updated.

Client Service Port :	<input type="text" value="8001"/>	<input type="button" value="Edit"/>	<input type="button" value="Save"/>
-----------------------	-----------------------------------	-------------------------------------	-------------------------------------

Backward compatibility of clients with this version would not be supported if port number is changed from 8001 to any other port.

While updating the repository path, you must ensure that the files in the earlier repository path are manually copied to the newer one. Also, you can map the path to a folder for which you have access privileges.

### 3.12.1.2 Settings for Load Balancing (Distributed Installation)

If Control Room is installed in Express mode or Custom – Standalone mode, then the Control Room Settings does not require configuration at the first login of Admin account.

However, if Control Room is installed in Custom – Distributed mode then post the first login of Admin account you will be prompted the Control Room Settings page, which you must configure else you will be restricted from navigating the Control Room application.

The screenshot shows the 'Control Room Settings' page. On the left is a sidebar with links: Dashboard, Repository Manager, Operations Room, User Management, Audit Trail, Task Schedules, Security, Clients, Credential Manager, and App Management. The main area is titled 'Control Room Configuration'. It contains four sections: 'Repository Path' (specifying the path to the Control Room repository), 'WebSocket Service' (specifying the host and port for the WebSocket service), 'Control Room Access URL' (specifying the host name or URL of the machine hosting the Control Room application), and 'Client Service Communication Port' (specifying the port number for client communication). A 'Save' button is located at the bottom right of the configuration area.

- Repository Path:** Provide the path of Control Room physical files repository. This must be a shared path so as to allow the Application to access the repository.
- WebSocket Service:** Provide the hostname and port of the machine where WebSocket service is running.
- Control Room Access URL:** Provide the hostname and port or URL of the machine hosting Control Room application or the Load Balancer through which the Client requests are routed to the application.
- Client Service Communication Port:** Control Room Administrator can configure the port number. Although, the default port is displayed as 8001; the Control Room administrator has the flexibility to edit the default port number and save it.

Click Save to save the configuration settings.

Upon successful configuration you will be displayed the ‘Getting Started’ page. Refer section on [‘Getting Started’](#) for details.

### 3.13 INSTALLING CONTROL ROOM LICENSE

You can install a license during evaluation, post-evaluation or if you have purchased more licenses to support growing number of Client users.

#### 3.13.1 Installing a purchase license during evaluation term

**Note:** You can evaluate Control Room for 30 days.

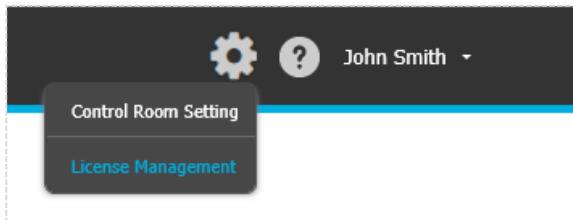
As a Control Room Admin you will be able to install licenses using any of the following methods:

- By clicking the 'Install License' button in the 'Evaluation' window.

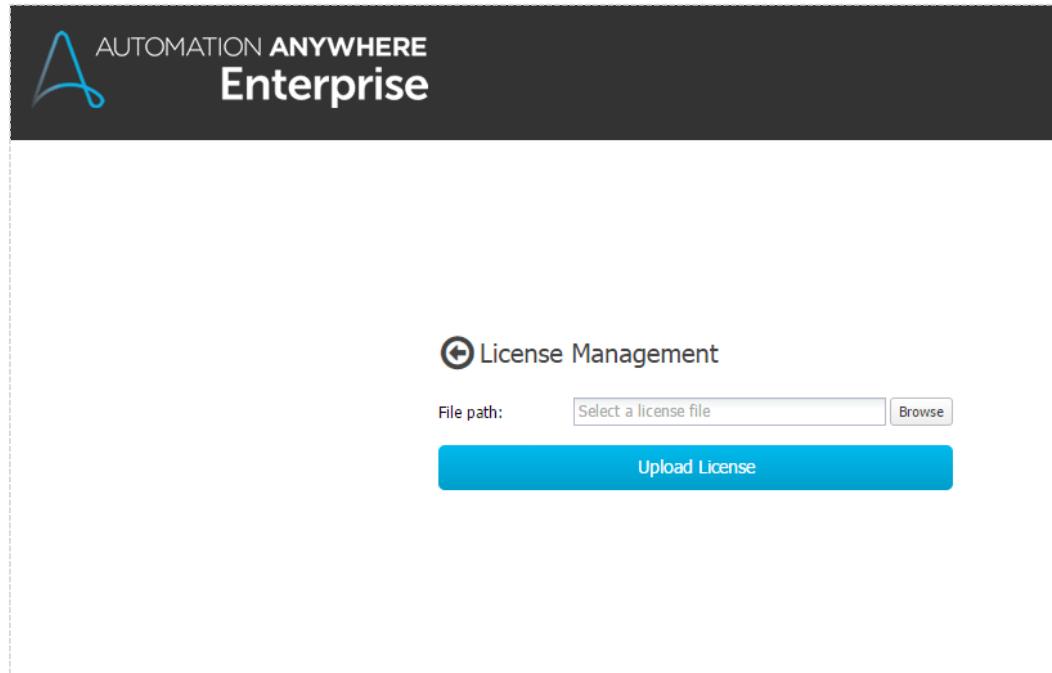


Or

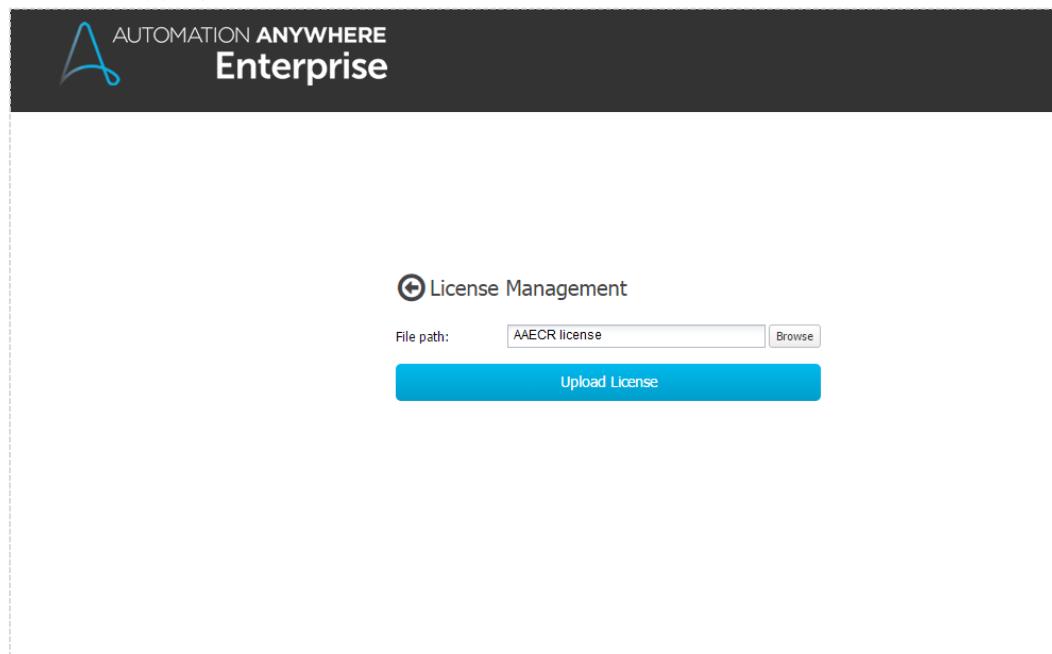
- By selecting 'Install New License' link in Settings > License Management.



1. Next, choose the purchase license file from a folder:



2. Select the appropriate file.



3. Click on 'Upload License'.
4. You are informed about successful installation of license through a message. Click 'OK' to confirm.



**Note:** You will have to re-login to Control Room after the license is uploaded successfully.

### 3.13.2 Installing a license on completion of evaluation term

In License Management, the Control Room Administrator can also view how many days are remaining for the license to expire.

If more than 30 days are left for license expiry, the License Management screen will be seen as follows:

The screenshot shows the 'Control Room' interface with a central modal window titled 'License Management'. The modal displays the message 'Your license expires in 121 day(s.)'. Below this, there are two tables: 'Client Usage Status' and 'App Usage Status'. The 'Client Usage Status' table shows usage for Development, Runtime, TaskBots, IQBots, and Metabots. The 'App Usage Status' table shows usage for Analytics, Operational, Business, and BotFarm. At the bottom, there is a 'License Allocation' table listing users Mike Lee, Tom Watson, and Amy Chen with their respective roles and status. The sidebar on the left lists various management modules: Dashboard, Repository Manager, Operations Room, User Management, Audit Trail, Task Schedules, Security, Clients, BotFarm Management, Credential Manager, and App Management.

If less than 30 days are left for license expiry, the License Management screen will be seen as follows:

License Type	Purchased	Used
Development	100	2
Runtime	100	1
TaskBots	100	1
IQBots	50	0
Metabots	50	0

Applications	Purchased	Used
Analytics		
Operational	Yes	No
Business	Yes	No
BotFarm	No	No
Client Block of Hours	0:00:00	0:00:00

On completion of the evaluation term, Automation Anywhere Control Room Administrator can continue using the purchased version only after the Control Room Administrator installs appropriate license.

When less than 30 days are left for license expiry, you will be notified on the Dashboard.

Client	Task Name	Started On	Progress	Actions

Schedule Name	Recurrence	Next Occurrence
SCH06	Daily	2015-12-26 12:1...
SCH89	Monthly	2016-02-21 15:1...
SCH65	Daily	2016-01-02 15:2...

Total files in repository	My Docs	My Exes	My IQBots	My Lists	My Metabots	My Reports	My Scripts	My Tasks	My Workflow
50	0	3	0	0	0	0	0	47	0

**Note:** The license expiry information will be seen on your Dashboard only if you have Admin privileges.

Admin - the Control Room Administrator can install a new license from License Management console. [Learn More](#).

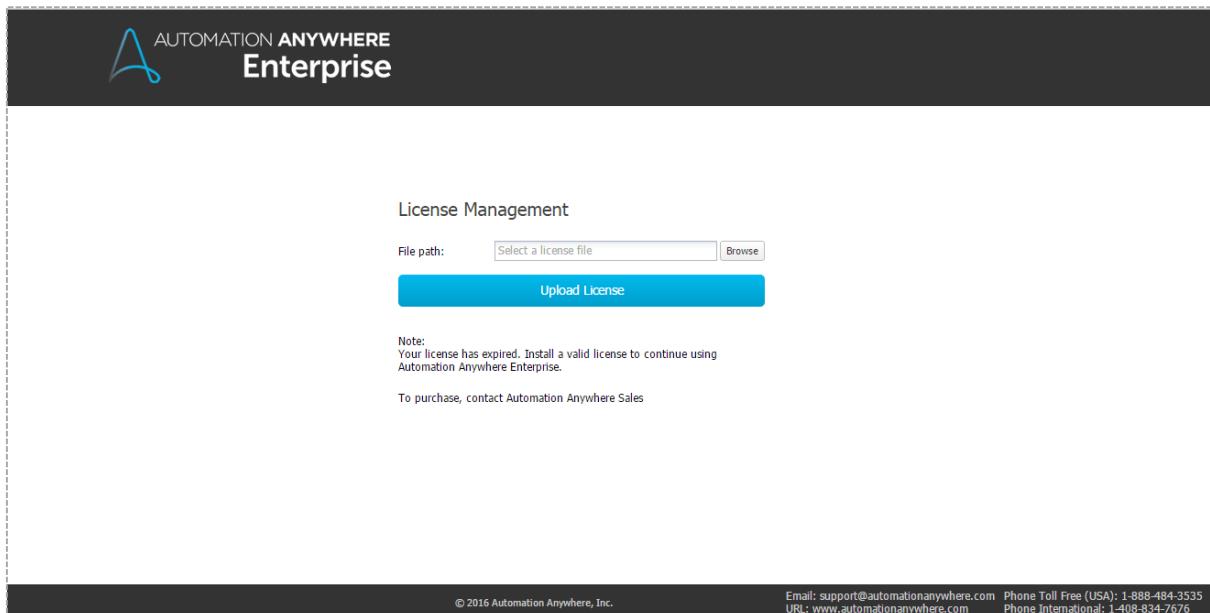
However, if your Control Room License has expired before you were able to install a new license, then you will be shown the below screen during Control Room login:



Sales hotline:  
Toll Free (USA):  
1.888.484.3535  
  
International Customers:  
1.408.834.7676

PO Box 24073,  
San Jose, CA 95154-4073  
  
Tel: 408.834.7676  
Fax: 1.408.834.7671

url:  
automationanywhere.com  
  
email:  
sales@automationanywhere.com



To purchase a license, the Control Room Administrator will have to contact Automation Anywhere Sales on [sales@automationanywhere.com](mailto:sales@automationanywhere.com).

After the completion of your order, you will receive an email from Automation Anywhere containing a registration license file. Download and save the file to a desired location on your computer.

Once you have uploaded the valid license file, you will be able to login to the Control Room and continue monitoring activities.

### 3.14 LAUNCHING THE CONTROL ROOM TO CREATE USER ROLES AND PRIVILEGES

Launch the Control Room in your default browser.

**Tip:** Use the link that's displayed on install setup completion.

You are now ready to create roles and assign necessary permissions to the users.

**Note:** Examples given in this document are for reference only. You can create and define roles according to your organizational structure and requirements.

Activities and access to Control Room for Users (Administrators, Clients and non-Clients) are governed by the role defined for each. The role based accessibility model ensures each User has controlled-access, to view information or data that is relevant to the role assigned by the Control Room Administrator.

User Roles and relevant privileges are assigned from the Security page.

The screenshot shows the Control Room interface with the 'Security' tab selected in the sidebar. The main content area displays a table titled 'Roles and Permissions' with the following data:

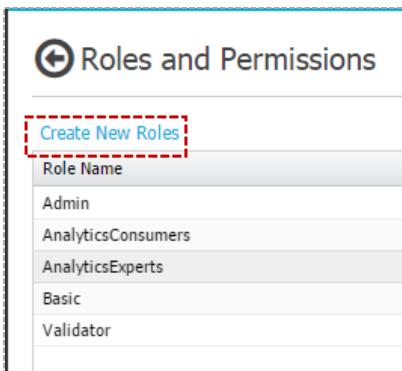
Role Name	Admin	Basic	BotCreator	BotRunner	Automation Champion	Automation Consumer	Automation Expert
Admin	✓	✓	✓	✓	✓	✓	✓
Basic	✓	✓	✓	✓	✓	✓	✓
BotCreator	✓	✗	✓	✗	✓	✗	✓
BotRunner	✓	✗	✓	✗	✓	✗	✓
Automation Champion	✓	✗	✓	✗	✓	✗	✓
Automation Consumer	✓	✗	✓	✗	✓	✗	✓
Automation Expert	✓	✗	✓	✗	✓	✗	✓

Admin and Basic Roles are defined by default in the Control Room.

- The Admin permissions in Control Room are granted to the Control Room Admin by default.
- Basic permission is essentially for Users that have been imported from earlier versions (8.x.x and 9.x.x) of Control Room to the browser based Control Room, using the migration utility. Such users have access rights to the 'My Tasks' folder only.

### 3.15 CREATING NEW ROLES AND ASSIGNING PERMISSIONS

To define a new user 'Role', click on 'Create New Roles'.



In the 'Create Role' page input the required information:

You can choose to assign permissions based on user roles in your organization.

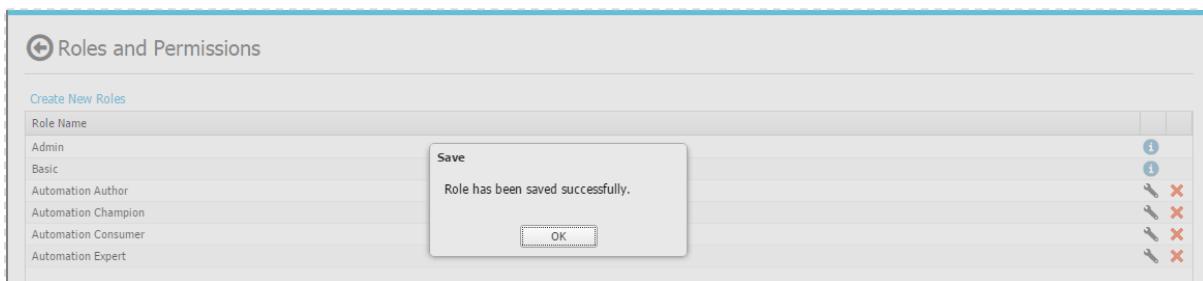
For instance, you can permit the new User to manage a repository only; in which case you can select the Repository Manager folder.

You can then assign the User access rights that could include any or all - Upload, Download, and Delete permissions for different folders.

For instance, you can assign a User 'Upload' and 'Download' permission to the 'My Tasks' folder only.

**Tip:** Some users such as Bot Runners - Users who use Enterprise Client to simply run tasks, can be given 'Folder Access Rights' only.

'Save' the new role.



Verify whether the User Role has been created in the 'Roles and Permissions' list. The User Roles are listed in the chronology that they are added and updated.

**Note:** Control Room users with task run and scheduling permissions can run and/or schedule tasks only on those Bot Runners that are assigned to their role. Refer the article on 'Assigning Bot Runners to Run/Scheduling Role.'

The screenshot shows the 'Control Room' interface with a sidebar containing links like Dashboard, Repository Manager, Operations Room, User Management, Audit Trail, Task Schedules, Security (which is selected), Clients, Credential Manager, and App Management. The main content area is titled 'Roles and Permissions: Create Role - Access to Bot Runners'. It shows two tables: 'Available Bot Runners' (Client, Client2) and 'Selected Bot Runners' (Client). Between them are buttons: 'Add >', '< Remove', 'Add all >>', and '<< Remove all'. At the bottom are '< Back' and 'Save' buttons.

### 3.16 MANAGING USER PERMISSIONS

You can reassign or revoke permissions to the user.

To view permissions and access rights available to an admin user, click the information icon .

Similarly, you can also view permission and access rights for the 'Basic' role.

**Note:** Though in edit mode, you will not be able to update the permissions and access rights of Admin and Basic

To edit the User roles and permissions, click on and to delete.

To return to the Dashboard, click on .

Refer the article on [User Roles and Permissions](#) in the online knowledge base for details.

### 3.17 ROLES AND PERMISSIONS MATRIX

The roles and permissions matrix published here will enable you to create a combination of roles and permissions that suit your organizational requirements.

Role	Description
User Management	User can add, update and/or delete Control Room users.
Repository Manager	User can run, force unlock and/or set production versions of tasks available in the Control Room repository.
Task Scheduling	User can add, update, delete and manage all tasks for scheduling to Bot Runner machines.
Client Management	User can view the Clients that are registered to the Control Room and export Client details to a CSV file, if required.
Roles and Permissions Management	User is granted privileges to manage roles and permissions to other Control Room users.
Audit Trail	User can review all Control Room relevant activities.
Credential Manager	User can create, edit, and delete credentials in the Control Room
License Management	User can allocate/deallocate licenses to Client users.

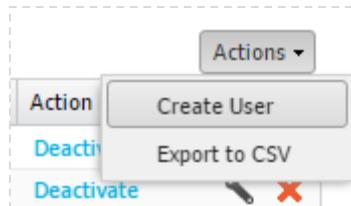
### 3.18 CREATING USERS IN THE CONTROL ROOM

Client User management involves creating users after defining specific roles as soon as the Control Room is hosted. These users can be either Non-Active Directory Users or Active Directory Users, as configured during installation.

Ideally, a 'Control Room Administrator' or Users assigned 'Admin' rights can create Users/Clients. These are then assigned roles depending upon access privileges.

User Name	First Name	Last Name	Email	Roles	Licenses	Action
John Smith	John	Smith	john.smith@automation...	Admin		<a href="#">Deactivate</a>
Tom Watson	Tom	Watson	tom.watson@automation...	BotCreator	Development	<a href="#">Deactivate</a>
Amy Chen	Amy	Chen	amy.chen@automationan...	BotRunner	RunTime (TaskBots, IQBots, MetaBots)	<a href="#">Deactivate</a>
Ellie Brown	Ellie	Brown	ellie.brown@automation...	BotRunner	RunTime (TaskBots, IQBots)	<a href="#">Deactivate</a>
Jason Goodman	Jason	Goodman	jason.goodman@automat...	BotRunner	RunTime (TaskBots, MetaBots)	<a href="#">Deactivate</a>
Mike Lee	Mike	Lee	mike.lee@automationany...	Basic		<a href="#">Deactivate</a>

1. To start creating a user, click on Create User under 'Actions'



2. Input the required information:

**Tip:** *Firstname and Lastname are optional. If you do opt to have Firstname and Lastname, you are allowed to include Numbers, Spaces ( ), Period (.), Hyphen (-), and Underscore (\_).*

3. For a Non-Active Directory User, provide information in each field:

User Name:	Ellie Brown
First Name:	Ellie
Last Name:	Brown
Email:	ellie.brown@automationanywhere.com
Role:	Automation Champion
Licenses:	<a href="#">Allocate License</a>

[Save and Add Another](#)    [Save](#)

The information for an Active Directory User gets auto-populated when you input the User Name and click 'Check Name':

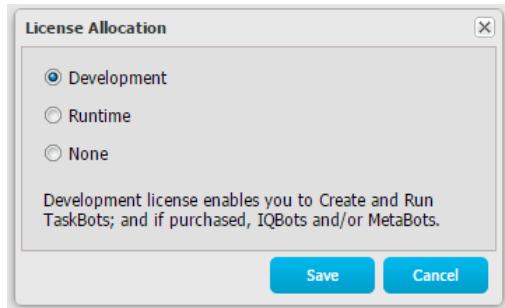
Domain:	AASPL-BRD
User Name:	AASPL-BRD\Ellie.Brown
(e.g. mydomain\john.smith)	
First Name:	Ellie
Last Name:	Brown
Email:	ellie.brown@automationanywhere.com
Role:	BotCreator
Licenses:	<a href="#">Allocate License</a>

[Save and Add Another](#)    [Save](#)

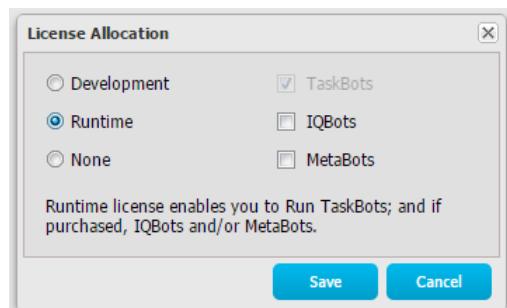
**Note:** If the Control Room is configured for a multi-domain environment, the 'Domain' is auto-populated with the domain name that you append for the user.

- Select either one or multiple Roles from the list as required. To delete the selection, use the cross-mark.
- An email is sent wherein the user will use the link to:
  - Verify the email id and set the Control Room access password, if the Control Room is configured for 'Non-Active Directory' users.  
OR
  - Verify the email id, if the Control Room is configured for 'Active Directory' users.
- Now allocate licenses based on the role by clicking 'Allocate License' link;

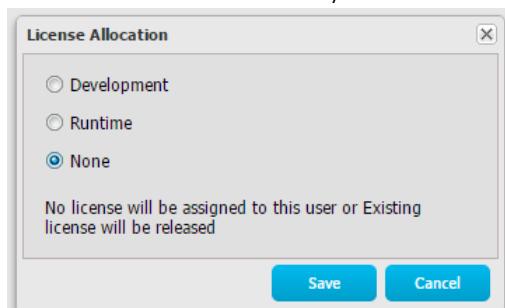
- a. For instance, a Bot Creator role can be allotted a 'Development' license:



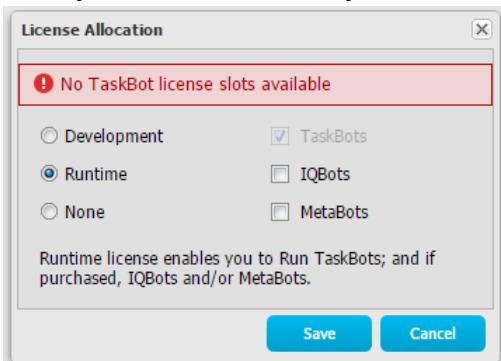
- b. While a Bot Runner role can be allotted a Runtime license:



- c. Or a Control Room user only would not require any Client license:



**Note:** If no slots are available for license usage, you are displayed:

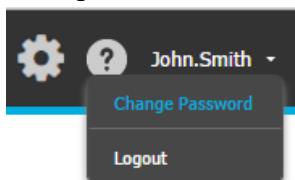


7. Click to 'Save'.

**Tip:** You can choose to switch a user type i.e. from Development (Bot-Creator) to Runtime (Bot-Runner) or vice versa as per organization's automation requirements by updating the license type from '[License Management](#)'.

### 3.19 SETTING USER PASSWORD

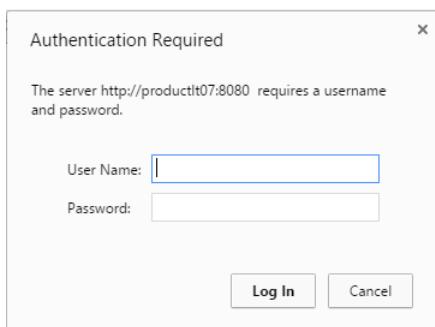
Control Room Users can change the password from within the Control Room by clicking on 'Change Password':



Set the new password:

 A screenshot of a modal dialog box titled "Change Password". It contains three input fields with asterisks: "\*Current Password", "\*Password", and "\*Confirm Password". Below the fields is a blue "Update" button.

The AD user will be able to login directly to the Control Room. However, user may have to input the Windows Credentials in case the browser settings are set to prompt.



### 3.20 FORGOT PASSWORD?

**Note:** Applicable to Non-Active Directory Users only

The Control Room Administrator can reset the password for login using the 'Forgot Password?' link:

1. Click on the 'Forgot Password?' link provided beneath the 'Login' button.

 A screenshot of the "Control Room Login" page. It shows a login form with a placeholder "John.Smith" in the username field and an empty password field. Below the form is a large blue "Login" button. To the right of the button, the text "Forgot Password?" is underlined in blue.

2. You are displayed a confirmation message for resetting your password.



## Confirmation

An email has been sent to you on the below email address to reset your Automation Account password.  
'john.smith@automationanywhere.com'

3. Click the 'Reset your password' link in the email that you have received.

Hello John Smith,

You have requested a password reset. Please follow the link below to choose a new password.

[Reset your password](#)

In case you face any issues, contact your Admin.

Happy Monitoring!

Regards,  
Automation Admin

**Note:** If you have not configured outgoing mail server, you will not receive an email notification. Instead, you will be displayed the set of 'Security Q&A' on clicking 'Forgot Password'.

4. In the Security Q&A section, input the required information.

## Forgot Password

Provide answers to the security questions below to verify your identity.

Username: John.Smith

1. Username

2. Persona

3. Location

[Back](#)

[Submit](#)

**NOTE:**

- Answers are case insensitive.
- Password reset is not allowed in case you forget answers to your questions.

5. On 'Submit', you will be redirected to the Login page wherein you can set your password:

**Set Password**

Username: John.Smith

\*Password

\*Confirm Password

Submit

6. On clicking 'Submit' you will be able to login to the Control Room using the new password.

### 3.21 UPDATING USER DETAILS

The Control Room administrator can update user details. User details such as alias names, email and roles can be modified; users can be activated, deactivated or even deleted if necessary.

To update user details, go to User Management, select the user and click

User Name	First Name	Last Name	Email	Roles	Licenses	Action
John Smith	John	Smith	john.smith@automation...	Admin		<a href="#">Deactivate</a>
Tom Watson	Tom	Watson	tom.watson@automation...	BotCreator	Development	<a href="#">Deactivate</a>
Amy Chen	Amy	Chen	amy.chen@automation...	BotRunner	RunTime (TaskBots, IQBots, MetaBots)	<a href="#">Deactivate</a>
Ellie Brown	Ellie	Brown	ellie.brown@automation...	BotRunner	RunTime (TaskBots, IQBots)	<a href="#">Deactivate</a>
Jason Goodman	Jason	Goodman	jason.goodman@automat...	BotRunner	RunTime (TaskBots, MetaBots)	<a href="#">Deactivate</a>
Mike Lee	Mike	Lee	mike.lee@automationany...	Basic		<a href="#">Deactivate</a>

Update required information and save.

User Name:

First Name:

Last Name:

Email:

Role:

Licenses:

**Save**

**Note:**

- If you have not configured Outgoing Mail Server, you will be allowed to set the password for a User who has forgotten the same. The User can then reset it during Control Room login.

User Name:

First Name:

Last Name:

Email:

Role:

Password:

Confirm Password:

Licenses:

**Save**

- You can also choose to reallocate license to switch user from Bot-Creator (Development) to Bot-Runner (Runtime) or vice versa by clicking on . Refer section on '[License Allocation](#)' for more information.

To activate a user, click **Activate**; to deactivate click **Deactivate** in the Actions column.

**Note:** To enable a Client User to register to the Control Room, it is important to 'Activate' the user. Use the 'Deactivate' option only if the Client user needs to be made inactive temporarily.

You can verify whether a user is 'Verified' and 'Registered' in License Management as shown:

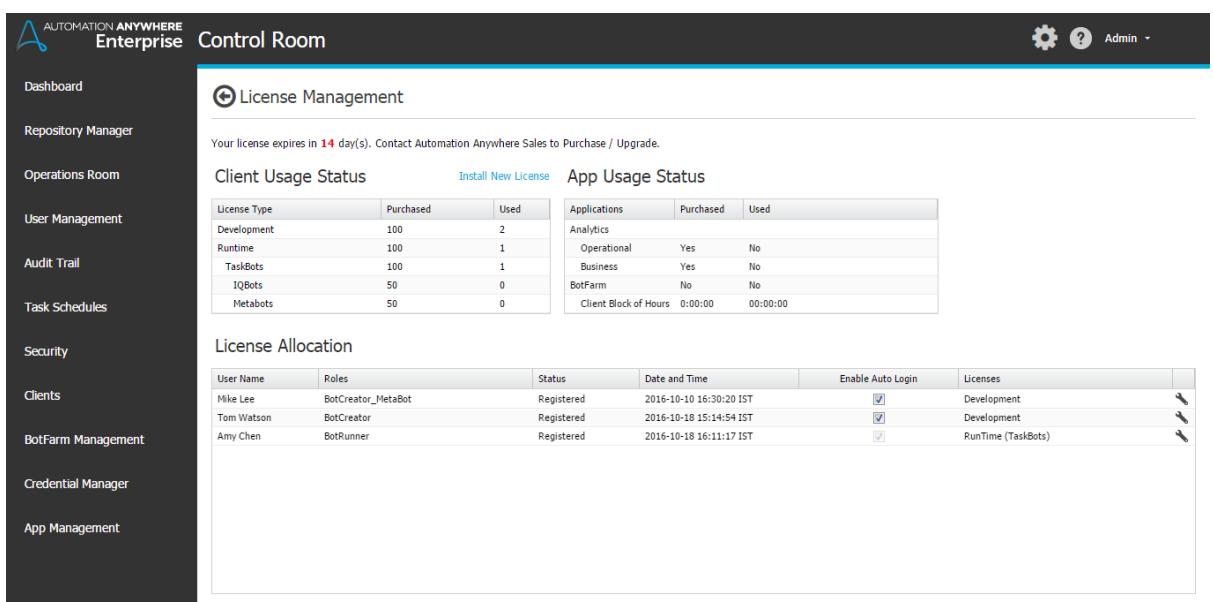
License Allocation						
User Name	Roles	Status	Date and Time	Enable Auto Login	Licenses	
Tom Watson	BotCreator	Registered	2016-06-29 15:15:19 IST	<input checked="" type="checkbox"/>	Development	
Amy Chen	BotRunner	Registered	2016-06-29 15:16:03 IST	<input checked="" type="checkbox"/>	RunTime (TaskBots, IQBots, MetaBots)	
Ellie Brown	Basic	Verified	2016-06-29 15:22:15 IST	<input type="checkbox"/>		
Jason Goodman	BotCreator	Verified	2016-06-29 15:23:12 IST	<input checked="" type="checkbox"/>	Development	
Mike Lee	BotRunner	Verified	2016-06-29 15:24:08 IST	<input checked="" type="checkbox"/>	RunTime (TaskBots)	
IQBotUser	BotRunner	Verified	2016-06-29 15:30:25 IST	<input checked="" type="checkbox"/>	RunTime (TaskBots, IQBots)	
MetaBotsUser	BotRunner	Verified	2016-06-29 15:31:07 IST	<input checked="" type="checkbox"/>	RunTime (TaskBots, MetaBots)	

To delete the user, click .

### 3.22 INSTALLING AND ALLOCATING LICENSES IN CONTROL ROOM

The Control Room administrator manages the installation, distribution, and allocation of licenses to Clients. Two aspects of Licensing can be managed from the License Management console:

1. New License Installation
2. License Allocation



User Name	Roles	Status	Date and Time	Enable Auto Login	Licenses	
Mike Lee	BotCreator_MetaBot	Registered	2016-10-10 16:30:20 IST	<input checked="" type="checkbox"/>	Development	
Tom Watson	BotCreator	Registered	2016-10-18 15:14:54 IST	<input checked="" type="checkbox"/>	Development	
Amy Chen	BotRunner	Registered	2016-10-18 16:11:17 IST	<input checked="" type="checkbox"/>	RunTime (TaskBots)	

**Note:** Purchase and subsequent license allocation is subject to the type of Enterprise Clients that need to be defined – Bot Creator (Development) or Bot Runner (Runtime).

### 3.22.1 Viewing License Usage

Once the license is installed, you can verify the Client usage status:

License Type	Purchased	Used
Development	25	0
Runtime	2	0
TaskBots	2	0
IQBots	0	0
Metabots	0	0

Here you can view:

- License Type** - Basically you can allocate licenses to two Client User types – Bot Creator (Development) and Bot Runner (Runtime).
 

Bot Creator Clients are the ones who are given the privilege of creating tasks in Enterprise Client. They can be allotted ‘Development’ license type.

Bot Runner Clients are run-time users who are allowed to run tasks only. They can be allotted ‘Runtime’ license types.
- Purchased** - Displays the number of licenses that have been purchased for Development Clients and Runtime Clients.
 

Bot Creator Client Users can be allowed to create tasks that could include IQBot and/or MetaBot if the required plug-ins have been installed.

The Bot Runner Client Users can be allocated licenses to enable the Scheduling Manager - User with scheduling privileges, to run tasks on Runtime Client User machines.

You can allocate licenses to Bot Runners depending upon your requirements. For instance, you could either allocate all Runtime licenses to TaskBot Clients or divide the licenses between IQBot and/or MetaBot if the plug-ins have been installed.
- Used** - Displays the number of licenses that have been consumed by Development and Runtime Clients (including IQBots and MetaBots).

### 3.22.2 App Usage Status

You can monitor your App - Analytics and BotFarm Usage status in License Management.

App Usage Status		
Applications	Purchased	Used
<b>Analytics</b>		
Operational	Yes	No
Business	Yes	No
BotFarm	No	No
Client Block of Hours	0:00:00	00:00:00

**Tip:** You need to register your applications App Management to be able to monitor your app usage.

Here, you can view:

- **Application License Type** - The status of licenses for Analytics and BotFarm are displayed in the Applications column.  
When you purchase a license for Operational and/or Business Analytics, the status under Purchased column is displayed as Yes.  
The BotFarm license needs to be purchased separately. It also displays Yes status if purchased.
- **Usage Status** - The status for Operational and Business Analytics is based upon license allocation to AnalyticsExpert and AnalyticsConsumer.

**Note:** The Operational Analytics license is assigned to the Analytics Expert, while the Business Analytics license is assigned to the AnalyticsConsumer. Refer the article on [Managing Roles and Permissions](#) for details.

Similarly, the Used column shows Yes as and when a license is assigned to a BotFarm Agent.

- **Client Block of Hours** - This indicates the hours purchased and utilized by BotFarm Agents.

### 3.22.3 License Allocation and Re-allocation

You can allocate and reallocate licenses to your Clients from the License Management view. Here, you can allocate or reallocate licenses to users that are already created.

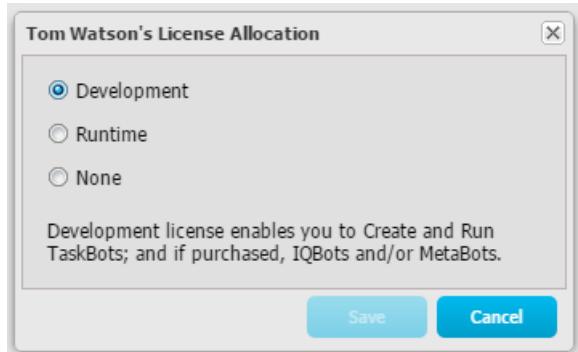
The User list depicts all the Clients that are registered to the Control Room.

License Allocation						
User Name	Roles	Status	Date and Time	Enable Auto Login	Licenses	
Tom Watson	BotCreator	Registered	2016-06-29 15:15:19 IST	<input checked="" type="checkbox"/>	Development	
Amy Chen	BotRunner	Registered	2016-06-29 15:16:03 IST	<input checked="" type="checkbox"/>	RunTime (TaskBots, IQBots, MetaBots)	
Ellie Brown	Basic	Verified	2016-06-29 15:22:15 IST	<input type="checkbox"/>		
Jason Goodman	BotCreator	Verified	2016-06-29 15:23:12 IST	<input checked="" type="checkbox"/>	Development	
Mike Lee	BotRunner	Verified	2016-06-29 15:24:08 IST	<input checked="" type="checkbox"/>	RunTime (TaskBots)	
IQBotUser	BotRunner	Verified	2016-06-29 15:30:25 IST	<input checked="" type="checkbox"/>	RunTime (TaskBots, IQBots)	
MetaBotsUser	BotRunner	Verified	2016-06-29 15:31:07 IST	<input checked="" type="checkbox"/>	RunTime (TaskBots, MetaBots)	

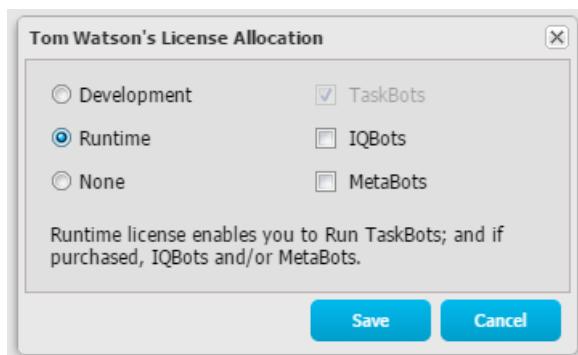
**Note:**

- A Client cannot connect to the Control Room until the user has been allocated a license. Once the Client logs in, that user is registered to the Control Room and the license is indicated as consumed.
  - You can choose to switch Client user types i.e. Development to Runtime or vice versa. Simply click on  to change the user type.
1. To allocate a license to a Client, click on  to launch the Client 'License Allocation' window and select the Client type:

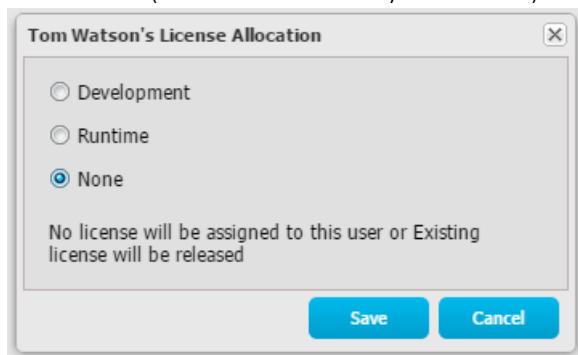
- You can select Development type for Bot-Creators:



- You can select Runtime for Bot-Runners:

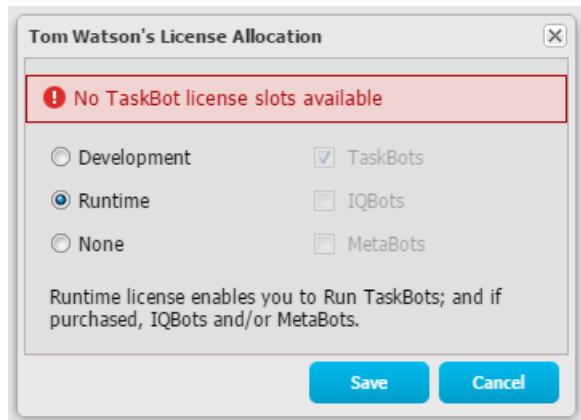


- None, when you want to either not allocate a license to the user i.e. create a Control Room user only or to release an existing license in order to convert a Bot-Creator to Bot-Runner (works the other way round also):



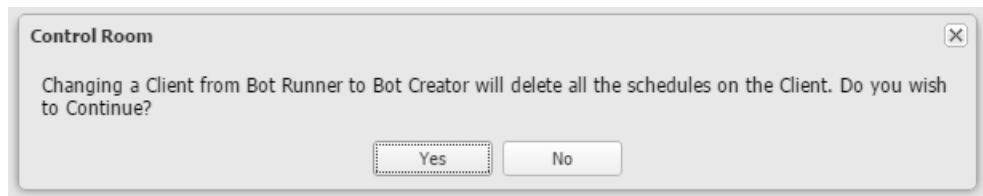
2. Click to 'Save'.

**Note:** If licenses are unavailable for consumption, you will be notified on license allocation:

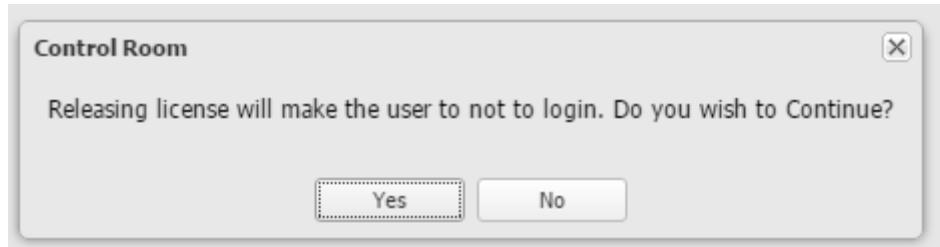


3. You can also modify the type of licenses allocated by clicking .

- If you modify a Bot-Runner Client to Bot-Creator, the existing schedules for that Client will be deleted.

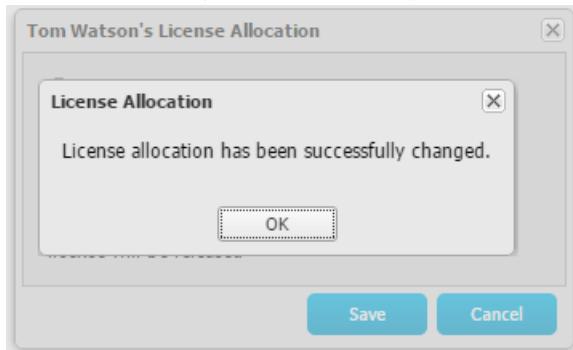


- If you select the 'None' option for an existing Client user who has been allocated Development or Runtime license, the license will be released:



The user will, however, not be able to login to the Client.

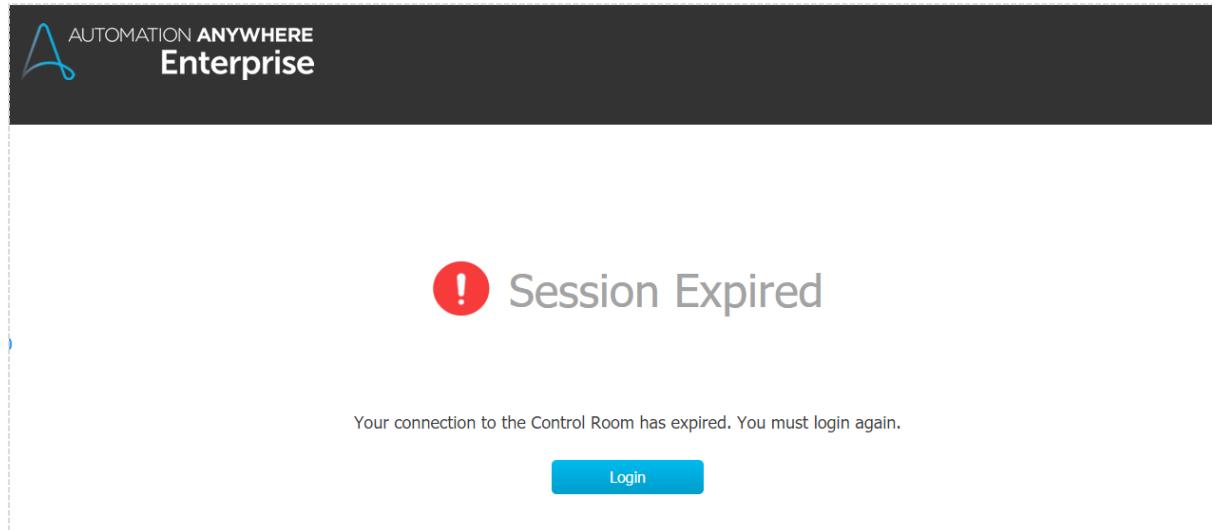
4. A success message indicates the updates are saved:



*Tip: If you run out of licenses, contact [support@automationanywhere.com](mailto:support@automationanywhere.com)*

### 3.23 SESSION EXPIRY

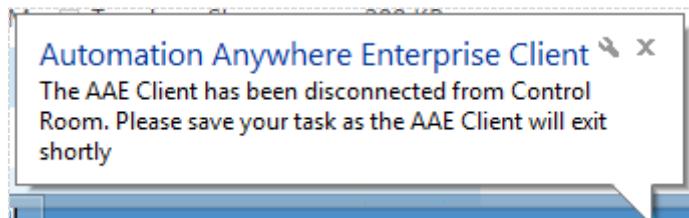
To preserve web server's resources, the Control Room's session expires after certain time of inactivity. By default, Automation Anywhere Enterprise Control Room session will expire after 20 minutes of inactivity.



To continue monitoring the Control Room, Non-Active Directory users will have to re-login after session expiry.

**Note:** After session expiry, the Active Directory users will be auto-logged in to the Control Room and the login entry can be seen in Audit Trail.

Users connected to the Control Room through Automation Anywhere Enterprise Client will be disconnected after some time:



You may also get 'Session Expired' screen if there is Multiple concurrent logins to Control Room using a user's credentials on the different machine / browser.

For Instance, User1 successfully login Control Room in Browser1/Machine1, and just a minute later if User2 successfully login in browser2/Machine2 using User1 login credentials, then User1 will be shown 'Session Expired' page on click of his next action in Control Room.

### 3.24 CONFIGURING VERSION CONTROL

To manage controlled edits of files that could include TaskBots, VisionBots, Reports, and Workflows, you can configure Version Control in Control Room Settings page.

The Control Room is tightly integrated with SubVersion version control system so that the versioning, checkin/checkout and other functionality can be leveraged with ease for all files.

### 3.24.1 Version Control Pre-requisites

For Version Control to be enabled and integrated from Control Room, it is necessary that SVN (SubVersion) should be installed and configured.

**Note:** Automation Anywhere supports Subversion v1.8.13 and v1.8.14 with Visual SVN Server 3.3.x.

An SVN Administrator user should be created with required permissions.

An SVN repository should be created, which can be used to store all version control files.

Control Room will be the basis of communication with SVN. Clients will not communicate with SVN directly.

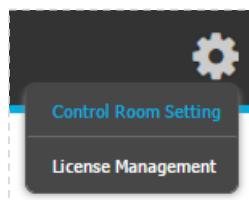
**Note:** Once the Control Room integration with SVN is up and running, all communication for version control operations from Enterprise Client to SVN will take place via Control Room only.

### 3.24.2 Enabling 'Version Control'

To be able to use 'Version Control' you need to 'Enable' the feature from the Control room.

Follow the below mentioned steps to enable Version Control:

1. Click on  button on the top right on the Control Room panel and select Control Room Settings.



Following image shows the default view of the Control Room Settings.

2. Click on Version Control Settings tab.

**Control Room Settings**

**Control Room Configuration**

**Version Control Configuration**

Version Control:  Enable  Disable

Use Secure Connection

\*SVN Server Name or URL: PRODUCTLT07

\*SVN Repository Path: 80

\*DomainUsername: John.Smith

\*Password:

**Connect**

Server Path:  
Local Path: C:\Users\Public\Documents\Automation Anywhere Server Files\Default  
Repository Uploaded on

3. Input the required details and click 'Connect'.
4. Once the connection is established successfully, the Server path will be auto-populated.

### 3.24.3 Uploading the Base Version

Before enabling Version Control, it is essential to upload a base version of all the files in the repository. Base version essentially serves as a basis for defining change and all the Version Control operations will be done on the defined base version only.

Though creating base version is optional, for existing users it is highly recommended as the first step towards versioning.

When a Client performs the first version control operation on a file, it will automatically be reflected in the Version Control Repository.

**Control Room Settings**

**Control Room Configuration**

**Version Control Configuration**

Version Control:  Enable  Disable

Use Secure Connection

PRODUCTLT07

svn\SVN 80

John.Smith

**Connect**

Server Path: http://productlt07/svn/SVN  
Local Path: C:\Users\Public\Documents\Automation Anywhere Server Files\Default  
Repository Uploaded on 09/21/2015 15:54

**Outgoing Mail Server Configuration**

**Note:** The upload Date and Time are displayed after the files are uploaded to SVN.



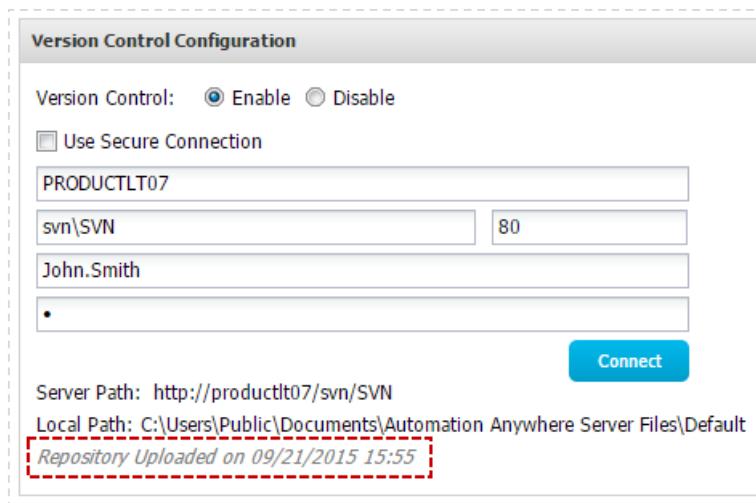
Sales hotline:  
Toll Free (USA):  
1.888.484.3535  
  
International Customers:  
1.408.834.7676

PO Box 24073,  
San Jose, CA 95154-4073  
  
Tel: 408.834.7676  
Fax: 1.408.834.7671

url:  
automationanywhere.com  
  
email:  
sales@automationanywhere.com

The total files on SVN will be same as the Repository Manager.

**Note:** Uploading base version may take time since it depends on the size of local repository being uploaded. Once the uploading is completed, the timestamp is set beside the Upload files link for the last upload process.



### 3.24.4 Un-map and Remap Server Path to Local Path

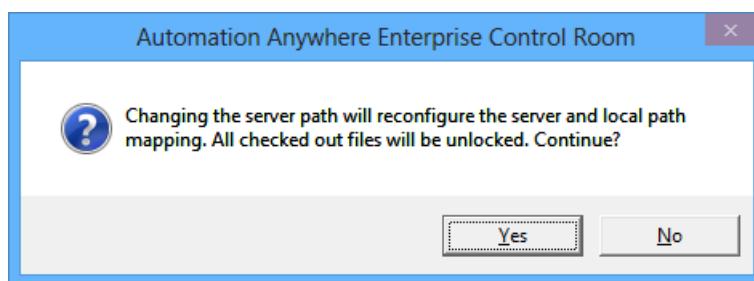
In case, your SVN Repository has moved to a new address/path, you will need to change the mapping of your server path to local path (application path).

**Note:**

- When changing only the URL Parameters, the current mapping will remain intact; however, a connection to the new URL will be re-established.
- When changing the path for SVN repository, the current mapping will be un-mapped and the new mapping will be established.

Remember, while re-mapping the SVN Repository should not comprise any file(s).

To change the server path, simply change the Path field to another SVN repository and click OK. In the ensuing message, select 'Yes' to continue.



On confirmation, the existing mapping will be removed, all checked out files will be forcefully unlocked by the Control Room Administrator and the new mapping will be created.

If the change in server path mapping fails, then an error "Unable to map the new Server path with Local path. Verify your path settings" will be displayed and the old mapping will be restored.

### 3.24.5 Verifying Version Control is enabled in Client

To confirm that Version Control has been integrated properly, simply launch the Enterprise Client. Learn how to launch the Client.

If Version Control is enabled, then you can see **+** sign in front of all the new tasks, which were not available on the Control Room when base version was uploaded.

**Note:** **+** indicates a new Task.

The screenshot shows the Automation Anywhere Enterprise Client interface. On the left, there's a sidebar with sections like AUTOMATE, MANAGE, DEFINE, and DISCOVER. The main area displays a table titled "Sample Tasks" with columns: File Name, Created At, Type, Repeat, Status, and Last Run Time. Several entries have a blue plus sign before them, indicating they are new tasks. Below the table, there's a "PROPERTIES" tab open, showing details for a task named "Download\_File.atmx". The "General" section includes fields for File Name, Repeat, Speed, Notification, Hotkey, and Security. The "Task Report" section shows metrics like Mouse Clicks, Keystrokes, and Total Clicks. A "Description / Notes" box provides a brief explanation of the task. At the bottom, it says "Enabled by SMART Automation Technology".

### 3.24.6 Using Version Control in Enterprise Client

With Version Control enabled you can perform controlled edits to your files - TaskBots (including IQBots), Docs, Reports, and Workflows.

This screenshot shows the same client interface as above, but with a context menu open over the "Download\_File.atmx" task in the list. The menu options include Run, Edit, Check Out, Upload, Version History, Copy, Rename, Locate on Disk, Send To, and Delete. The "PROPERTIES" tab is also visible at the bottom.



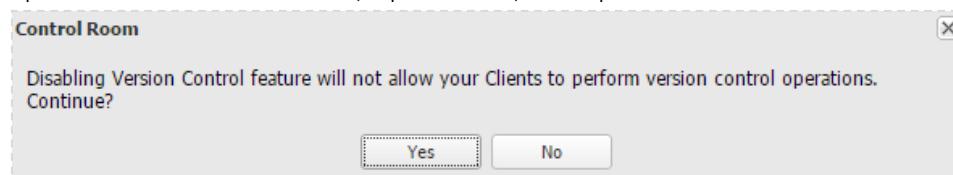
Use Version Control to perform following operations:

1. **Create:** You can create a new file in the local repository. A plus sign (+) indicates the file is new.
2. **Edit:** You can edit a file only if it has been 'Uploaded' and 'Checked Out'.
3. **Check Out:** A file that already exists in the server repository can be checked out for editing. A check mark (✓) indicates the file is checked out
4. **Upload:** Post editing, you can upload a file to the server repository with comments. No prefixed icon/sign denotes a successful upload. You can also upload files from a specific folder from the Tasks List/Repository.
5. **Version History:** You can view revisions to a file and if required, roll back any updates.
6. **Copy and Rename:** You can make a copy of a selected file in the local repository provided it has not been checked out.
7. **Delete:** You can delete a file from the local repository provided it has not been checked out.

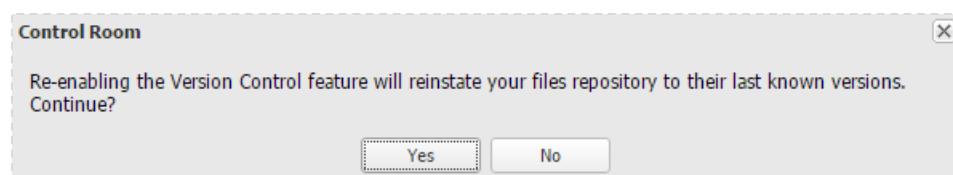
### 3.24.7 Disabling Version Control

The Control Room Admin has the privilege of disabling and re-enabling the Version Control feature.

Clicking 'Disable' will not allow Clients configured to the Control Room to perform versioning operations such as Check Out, Upload Files, and Upload Comments & view Version History.



**Note:** It's possible to re-enable Version Control at a later stage if required. Simply click 'Enable' to continue using versioning operations from where you left off!



**Note:** Disabling Version Control will also disable the Configure and Upload files link.

## 3.25 SMTP MAIL SERVER CONFIGURATION

This configuration is required for email notification from Control Room to Control Room Users.

**Note:** This setting is optional. However, we recommend configuring SMTP Mail Server as the Control Room Administrator will not be able to convey important information regarding account creation, credentials, resetting password and account deactivation, separately.

For SMTP mail server configuration, you will need the following information:

1. Host Name
2. Port Number
3. Email Id
4. Username
5. Password

The screenshot shows the 'Control Room Settings' interface with the 'Outgoing Mail Server Configuration' tab selected. Under 'Email Configuration', the 'Enable' radio button is selected. The 'From:' field is empty. The 'Host:' field contains 'my.myISP.com' and the 'Port:' field contains '25'. Below these fields is a note '(e.g. my.myISP.com or LocalSMTPServer)'. There are two checked checkboxes: 'My server uses secure connection (SSL/TLS)' and 'My server requires authentication'. The 'Username:' field contains 'abc@myISP.com' and the 'Password:' field is empty. A 'Save changes' button is located at the bottom right of the configuration section.

Select the 'My Server uses a secure connection' option to establish a secure connection to the SMTP server.

Alternately, in case the SMTP server does not require authentication, disable the 'My server requires authentication' option to allow the Control Room to bypass authentication to the SMTP Server for sending email notifications.

**Note:** Both options are enabled by default.

On saving the configuration, the Control Room verifies the authentication details and provides the required response.

### 3.26 CONFIGURING THE CREDENTIAL VAULT FROM CONTROL ROOM SETTINGS

As mentioned earlier, to configure settings for Credential Vault, an Admin has to choose between Express or Manual mode during setup and can opt to switch modes in the Control Room Settings, later.

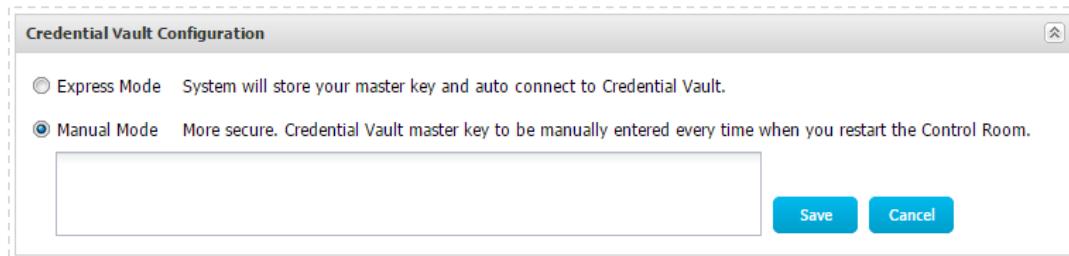
**⚠️ Important:** If the Control Room is setup using '[Distributed Mode](#)', you can switch modes only after configuring the Control Room for '[Load Balancing](#)'.



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**⚠️ Important:** Store the master key at a secured location. Any modification or loss may result in your losing complete access to the Control Room.

1. **Express Mode** - Use this to auto connect to the Credential Vault with the master key that is stored in the system during Control Room configuration.
2. **Manual Mode** - Use this to manually connect to the Credential Vault using the master key that was available during Control Room configuration.

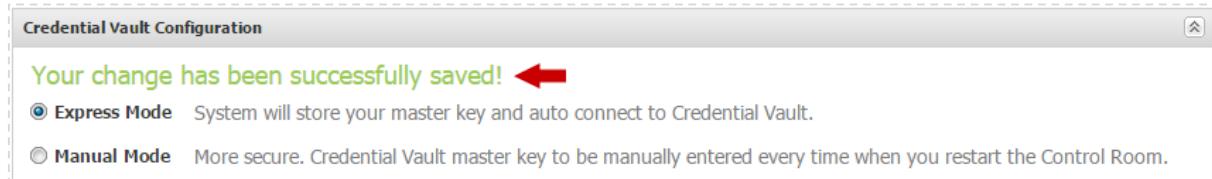
**Note:** You will have to provide this key every time you start/re-start the Control Room.

While switching modes, you must provide the Master Key in the field and click Save for the changes to take effect.

**⚠️ Important:** For some reason, if you must retrieve the master key, it is stored in the 'CredentialVault.dat' file of the repository path provided you have configured directly in Express mode **or** have upgraded from AAE 10.2.0 to the current version.

**E.g.** C:\Users\Public\Documents\Automation Anywhere Server Files\CredentialVault.dat

A successful switch is denoted with:



### 3.27 SETTING THE CLIENT SERVICES COMMUNICATION PORT IN CONTROL ROOM SETTINGS

The port number is configurable by the Control Room administrator. An Admin has the flexibility to edit the default port number and save it.

**Note:** The default port will be displayed as 8001.

The screenshot shows the 'Control Room Settings' page. In the 'Control Room Configuration' section, the 'Repository Path' is set to 'C:\Users\Public\Documents\Automation Anywhere Server Files'. A note below says: 'Before updating the path, ensure a backup copy of the repository is available at the target location. Ensure the Control Room is in maintenance mode and Clients are not connected to the Control Room when Repository path is updated.' There are 'Edit' and 'Save' buttons. A note at the bottom states: 'Backward compatibility of clients with this version would not be supported if port number is changed from 8001 to any other port.' Below this are sections for 'Version Control Configuration', 'Outgoing Mail Server Configuration', 'Email Notifications', 'Credential Vault Configuration', and 'Client Configuration', each with a collapse/expand arrow.

Also, Control Room admin will receive a prompt for confirmation before saving any changes to the port



If the newly defined port is blocked on the Client side, then a notification is prompted to the Client user informing that the port is blocked. Also, a pop-up message appears as "Port Is Blocked - Client Communication Services Port Blocked - Contact Control Room Administrator."



If a port is in use by some other services then a pop-up appears, "Port Is in Use – Client Communication Services Port Is in Use - Contact Control Room Administrator."



When you make changes in the port number an audit entry appears in the Control Room as "Client Communication Services Port is changed."

The screenshot shows the 'Audit Trail' page. It displays audit data from 09/26/2016 to 09/26/2016. The table has columns: Level, Activity Type, Source, User, Computer, Date and Time, Status, and Description. Two entries are shown:

Level	Activity Type	Source	User	Computer	Date and Time	Status	Description
Information	Update Configuration	Control Room	admin	ENGG39.AASPL-BR...	2016-09-26 13:51:21 IST	Success	Client Communication Services Port is changed.
Information	Login	Control Room	admin	ENGG39.AASPL-BR...	2016-09-26 13:48:25 IST	Success	Logged in successfully

## 4 AUTOMATION ANYWHERE ENTERPRISE CLIENT

### 4.1 PRE-REQUISITES

This section helps you determine whether your system has the proper hardware and software to install Automation Anywhere. Before installing this version of Automation Anywhere, verify that your environment supports the following requirements.

### 4.2 OPERATING SYSTEMS

(*32-bit and 64-bit OS versions are supported.*)

1. Microsoft Windows Server 2012 R2
2. Microsoft Windows Server 2011
3. Microsoft Windows Server 2008 R2
4. Microsoft Windows 8.1/ 8
5. Microsoft Windows 7 SP1

**Important:** On Server machines, Automation Anywhere does not support concurrent 'Terminal Server' connections.

**Processor speed:** Recommended - 3 GHz, Multi Core or higher.

**RAM:** It is recommended that 4 GB or higher RAM should be available after AAE Client has been installed.

**Hard Disk capacity:** 200 MB of free hard disk space for installation.

**Note:**

- *On an average an Automation Anywhere script is approximately 100-150 KB. Additional free disk space is required to develop automation projects, as Automation Anywhere creates temporary files like screenshots, server logs, audit files etc. during the execution of the automation scripts.*
- *The actual free space required increases with the project size and hence it is recommended to have at least 40-50 GB of free disk space in order to implement long term projects.*

### 4.3 ADDITIONAL REQUIREMENTS

1. .NET Framework 4.6
2. 1024 x 768 or higher resolution monitor
3. Mouse or other pointing device
4. Microsoft Internet Explorer 8.0 or later

### 4.4 SYNCHRONIZATION BETWEEN CLIENT AND SERVER

To synchronize the time between the Automation Anywhere Client and the Enterprise Control Room, enable the Network Time Protocol (NTP) settings on your network.



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url:  
[automationanywhere.com](http://automationanywhere.com)  
  
email:  
[sales@automationanywhere.com](mailto:sales@automationanywhere.com)

**Note:** For more information regarding modification of the NTP settings for your network, contact your system administrator.

## 4.5 INSTALLING THE AAE CLIENT

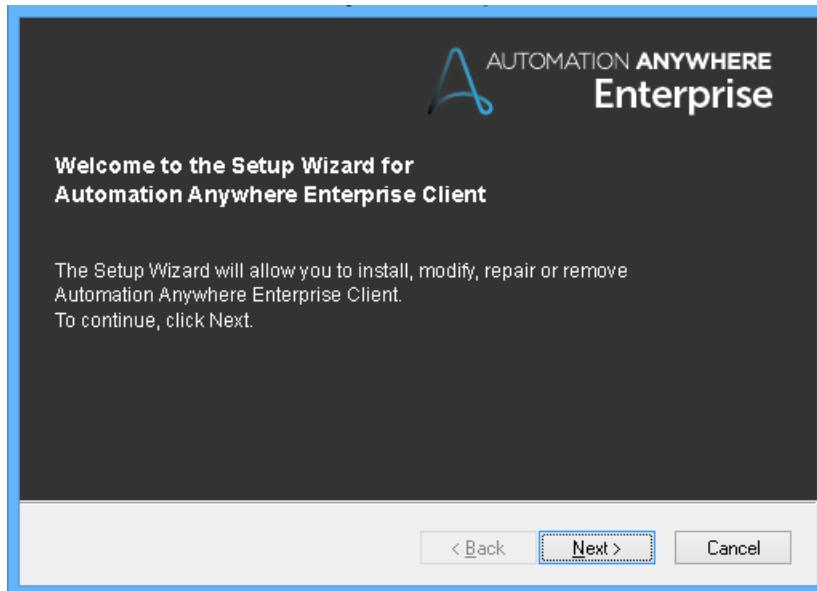
Using the Client setup, you will be able to install the following components:

1. Enterprise Client
2. MetaBot Designer (requires separate license to enable)
3. Internet Explorer 11 plugin (optional)
4. Chrome plugin (optional)

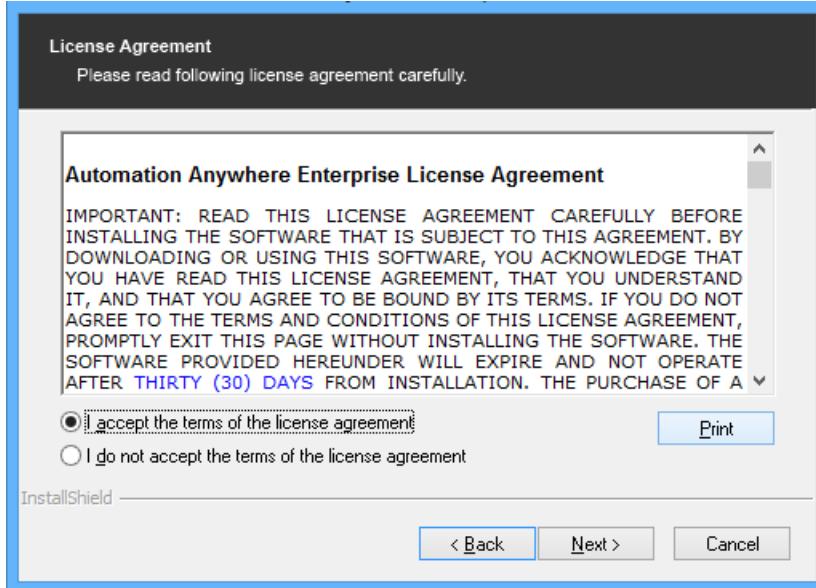
To begin installation of Automation Anywhere Client, follow the steps given here:

1. Run the Setup for Automation Anywhere Enterprise in Administrator mode.

**Note:** If you already have installed a previous version of the Client, ensure you perform a complete uninstall. This can be done from the Control Panel > Programs and Features.

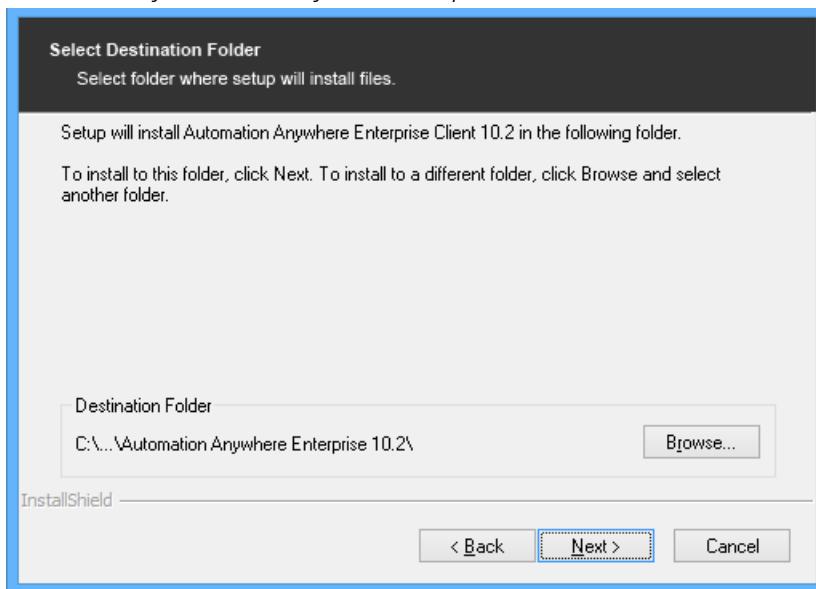


2. Accept the terms of license agreement.



3. Select the Destination Folder where you want the setup to install files.

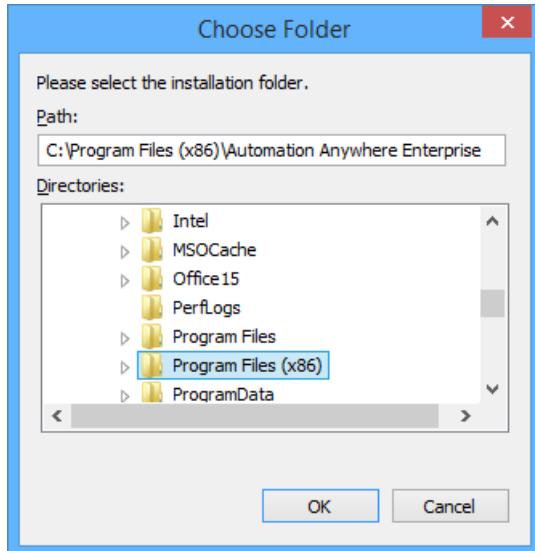
**Note:** The default location for the Setup Installation is C: Drive.



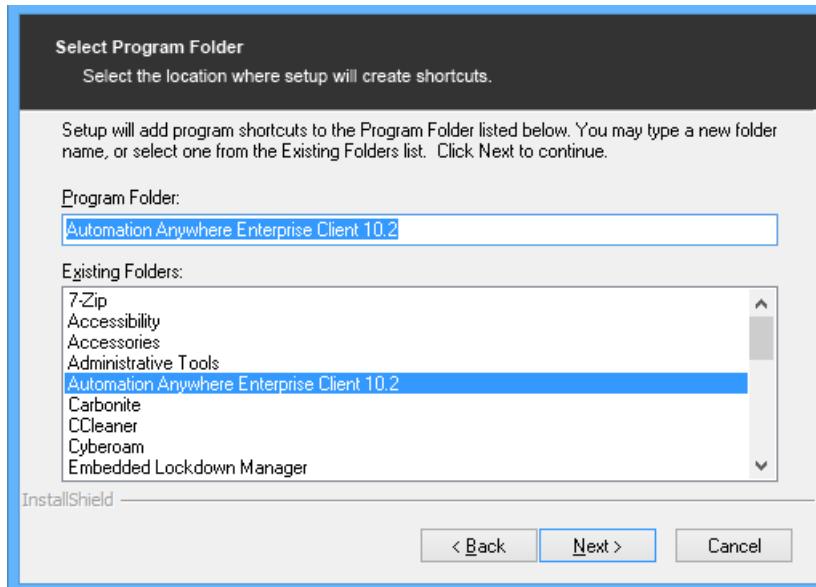
4. To install the Setup in the default folder, click 'Next'. However, if you wish to install the Setup in different folder, click 'Browse'.

**Note:** If Automation Anywhere already exists and you are upgrading to the newer

version, then you can choose to install the Setup files in the existing folder.



5. You can opt to create shortcut for your application by either renaming the default folder name or selecting one from the list.

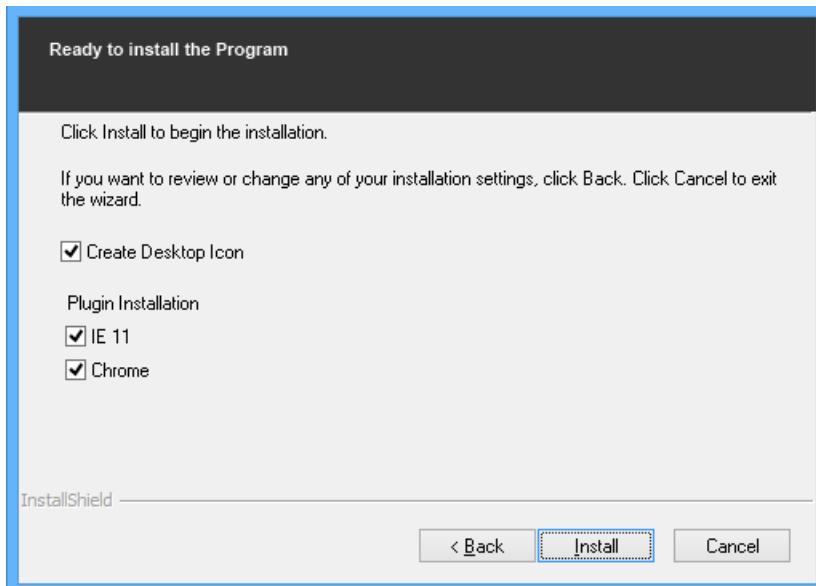


6. Mark or unmark the 'Create Desktop Icon' option and click 'Install' to begin the installation.

You can also opt to install IE 11 and Chrome\* plugins to record and play tasks.

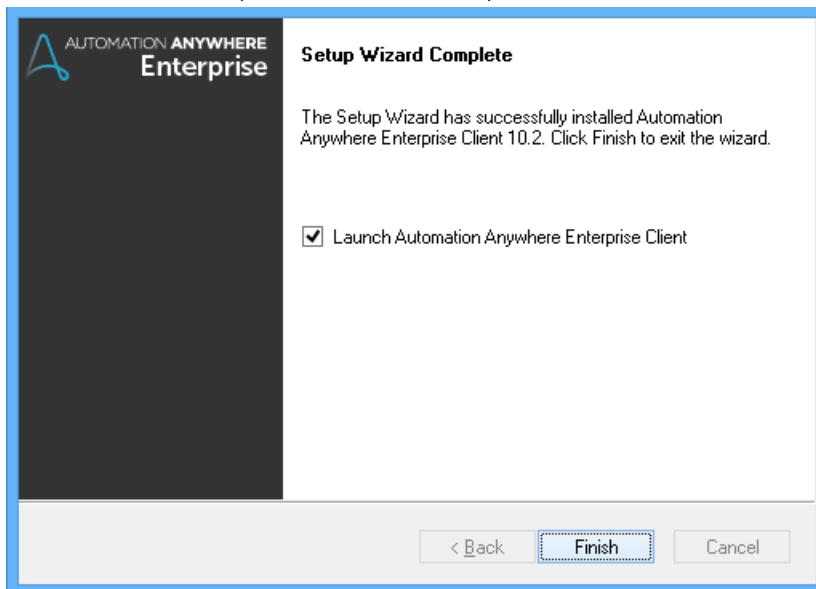
\* Automation through Chrome is not supported in MetaBot Designer.

**Tip:** Unmark the options that you do not want to include. E.g. Unmark 'Create Desktop Icon' if you do not want a shortcut created for the application on your desktop.



**Note:** If any of the dependency services are not running, you will have to manually start those from the Services tab in the Task Manager.

7. Click 'Finish' to complete Automation Anywhere installation.

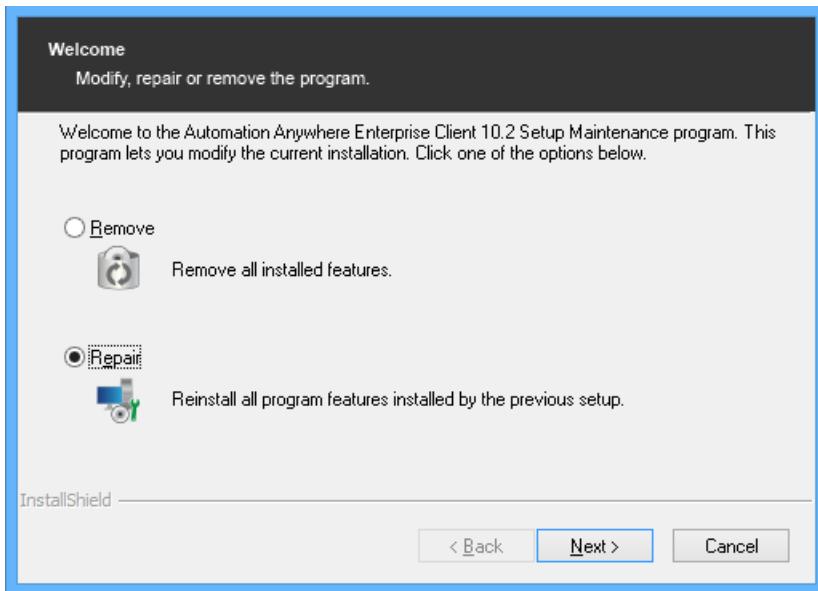


## 4.6 REPAIR

Use the 'Repair' option to re-install all the program features that were installed during the initial setup run.

To 'Repair', follow the steps mentioned below:

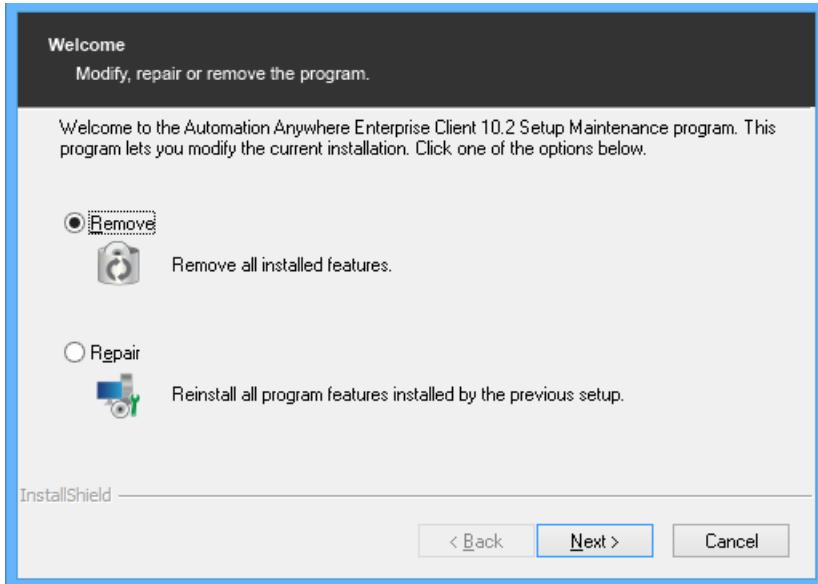
1. Launch the Automation Anywhere Enterprise Setup Wizard and select the 'Repair' option.
2. Click 'Next'.



## 4.7 UNINSTALLING THE AAE CLIENT

If for any reason you wish to uninstall Automation Anywhere Enterprise, go to Control Panel > Programs and Features. Select Automation Anywhere Enterprise and click Uninstall.

Alternatively, you can choose to remove the Automation Anywhere Enterprise by launching the Setup Wizard and selecting 'Remove'.



## 4.8 SILENT INSTALLATION

Silent Installation, also known as unattended installation, runs the entire installation process in the background, without requiring user interaction or displaying messages.

To do this, create a file of installation response file and send the file to machine where you wish to install the Automation Anywhere Client.



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automationanywhere.com  
  
email:  
sales@automationanywhere.com

The installation response file is created with the name of Setup.iss. This file contains the Install/Uninstall steps that have been recorded during the process.

Refer Creating Response File for details.

#### 4.8.1 Creating a Response File

To create the response file, perform the following steps:

1. Identify the directory containing the Automation Anywhere Enterprise Setup. For instance:  
`"D:\Setup_Files\Automation_Anywhere_Enterprise_Client_10.3.exe"`
2. You must create a response file for Client. In Windows command prompt key in:  
`"D:\Setup_Files\Automation_Anywhere_Enterprise_Client_10.3.exe" /r`
3. This will record the installation steps in the response file 'Setup.iss' as you perform them.  
*Tip: Once the installation is complete, send the response file to the machine where you wish to install the Client, together with the setup files.*

**Note:** Setup.iss file is by default written to the %SystemRoot%\windir directory for Windows operating system.

#### 4.8.2 Performing Silent Installation

To perform silent installation with a response file, use the command-line mode or a batch script to invoke Automation Anywhere Installer and enable the response file that you created.

On each system where you want to install Automation Anywhere Enterprise, invoke the installer using the following command syntax at the command-line prompt:

```
"D:\Setup_Files\Automation_Anywhere_Enterprise_Client_10.3.exe" /s /f1  
"D:\Setup_Files\Setup.iss"
```

**Note:** It is important to leave a space before specific commands as shown in the above example.

To uninstall a Client, key-in the following at the command line prompt:

```
"D:\Setup_Files\Automation_Anywhere_Enterprise_Client_10.3.exe" /s
```

#### 4.8.3 Special Notes

- Be sure to create separate response files for 32-bit and 64-bit operating system versions.
- Silent installation can be used only for installing or uninstalling the product. It cannot be used for modifying or repairing the installation.
- Use the /f1 option to specify the location of the response file (where it should be created) and its name.
- Use the /z option to pass data to the InstallScript system variable CMDLINE

#### 4.8.4 Viewing Log Files and Error Messages

Two log files are generated during silent installation:

1. setup.log
2. productname.txt.



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#### 4.8.5 Working with the Setup.log File

The Setup.log file is created in the same directory as the response file.

The /f2 option enables you to specify an alternative log file location and file name. For example:

```
"C:\Setup.exe" /s /f2 "C:\Setup.log"
```

Result codes with descriptions are listed in the table below:

Result Codes	Description
<b>0</b>	Success
<b>-1</b>	General Error
<b>-2</b>	Invalid Mode
<b>-3</b>	Required data not found in the setup.iss file
<b>-4</b>	Not enough memory available
<b>-5</b>	File doesn't exist
<b>-6</b>	Cannot write to response file
<b>-7</b>	Unable to write to the log file
<b>-8</b>	Invalid path to the Install shield Silent response (.iss) file
<b>-9</b>	Not a valid list type (string or number)
<b>-10</b>	Data type is invalid
<b>-11</b>	Unknown error during setup
<b>-12</b>	Dialog boxes are out of order
<b>-51</b>	Cannot create the specified folder
<b>-52</b>	Cannot access the specified file or folder
<b>-53</b>	Invalid option selected

#### 4.8.6 Working with the Productname.txt file

The Productname.txt file is created on the desktop when any of the following errors occur:

1. Required Microsoft.NET Framework is not present to install Microsoft .NET Framework
2. Services are not able to start.

For further details on installation and uninstallation of the Automation Anywhere Enterprise Control Room and Client, contact [support@automationanywhere.com](mailto:support@automationanywhere.com)



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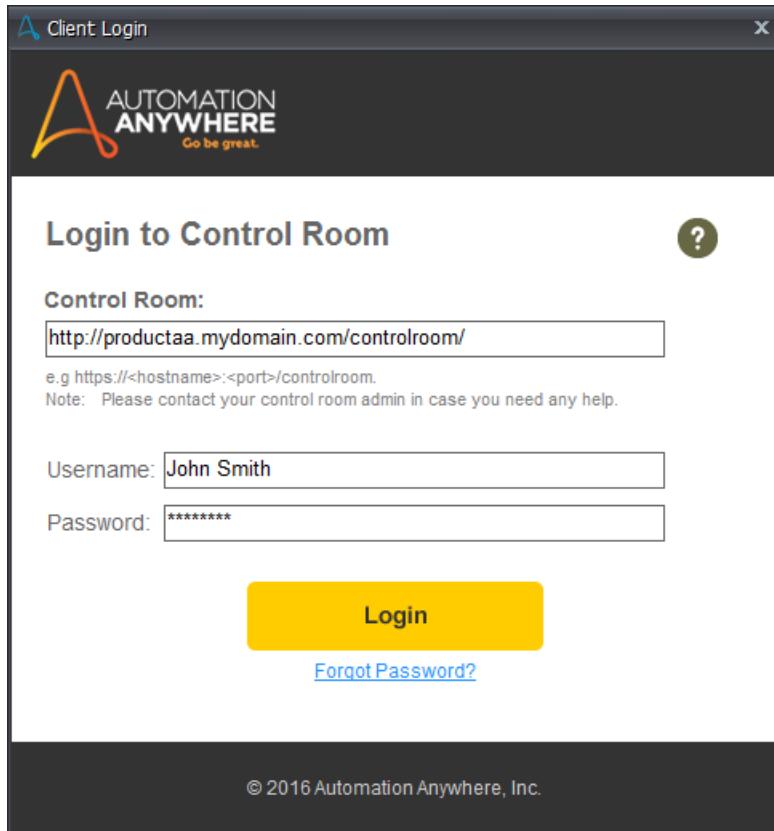
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## 5 LOGIN TO AUTOMATION ANYWHERE CONTROL ROOM

Automation Anywhere allows you to monitor and administer a large multi-site complex automation infrastructure using the web based Control Room.

**Note:** 'Login' to Control Room is mandatory from Enterprise Edition 10.0 onward.

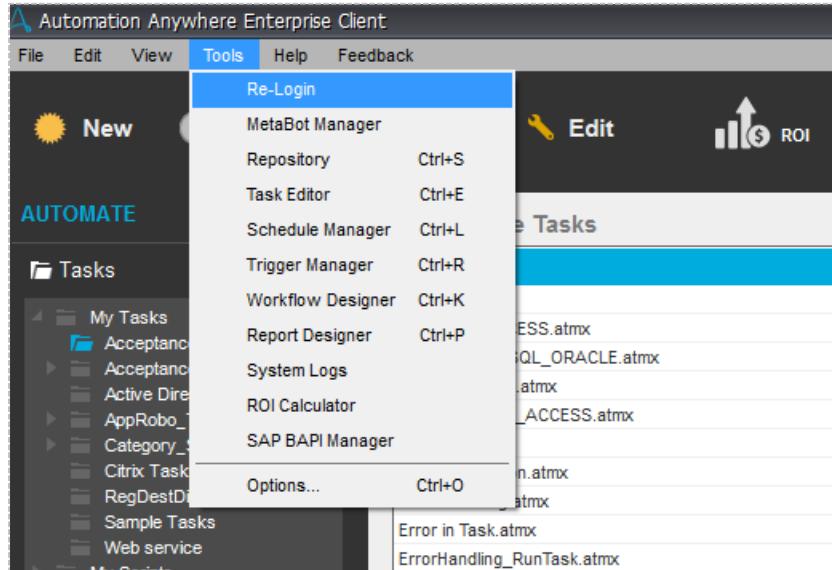


### 5.1 LOGIN TO THE CONTROL ROOM

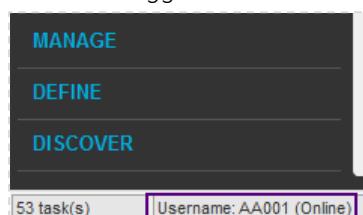
1. As a Client user, launch Enterprise Client.
2. Input Control Room URL in the 'Control Room' field of the Login screen.  
**Example:** If your Control Room URL is <http://productlt07:8080/controlroom>, the Control Room URL for login will be <http://productlt07:8080/controlroom>
3. Enter your Control Room user credentials.  
**Note:** The Control Room administrator can create a user in web-based Control Room. Refer [User Management](#) for details.
4. If launching for first time, input the appropriate Control Room URL. On logging in the second time, your last login URL is displayed. If you wish to login using another URL, simply input the appropriate URL.

## 5.2 RE-LOGIN TO CONTROL ROOM

1. To re-login Control Room using a different user credentials, click Tools > Re-login.
2. Input user credentials in the Login dialog that prompts.

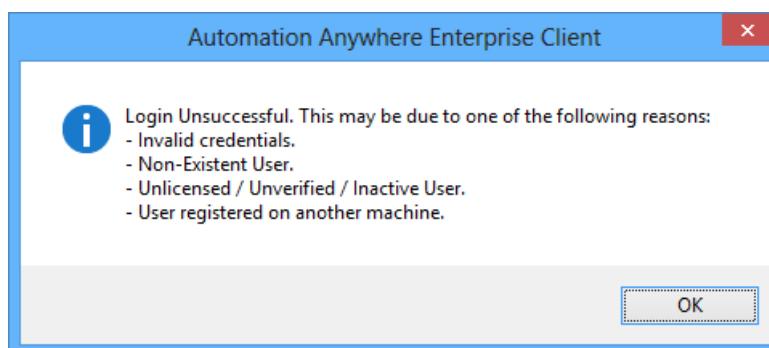


*Note:* The logged in username and status is displayed in the status bar.



## 5.3 UNABLE TO LOGIN?

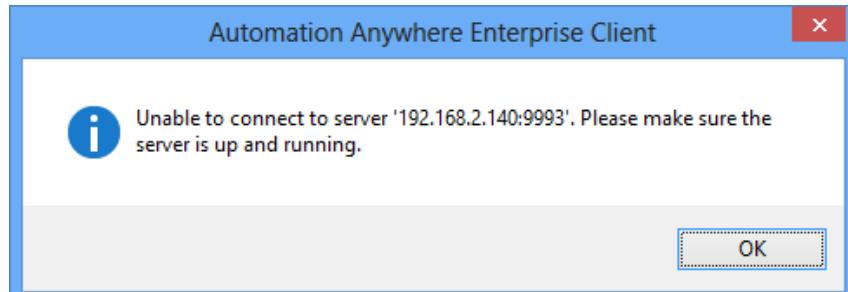
If you cannot login to the Control Room, you can trouble-shoot based on the messages that you encounter. Possible reasons could be:



- Invalid credentials - you might have input an incorrect username and/or password.
- Non-Existent User - Client is not created in the Control Room to which you are trying to connect.
- Unlicensed User - You have not been allocated the required license.
- Unverified - Email verification is pending.

- Inactive User - The Control Room Admin has 'Deactivated' your Client.
- User is registered on another machine - When you try to login from a different machine (than the one from which you have registered).

Also if, during login, the Client displays the following message, you will have to verify whether the Client and Control Room are configured to the same version:



*Tip: If there is a major version mismatch i.e. if any of the component is of higher version than another, then you must upgrade to the appropriate version.*

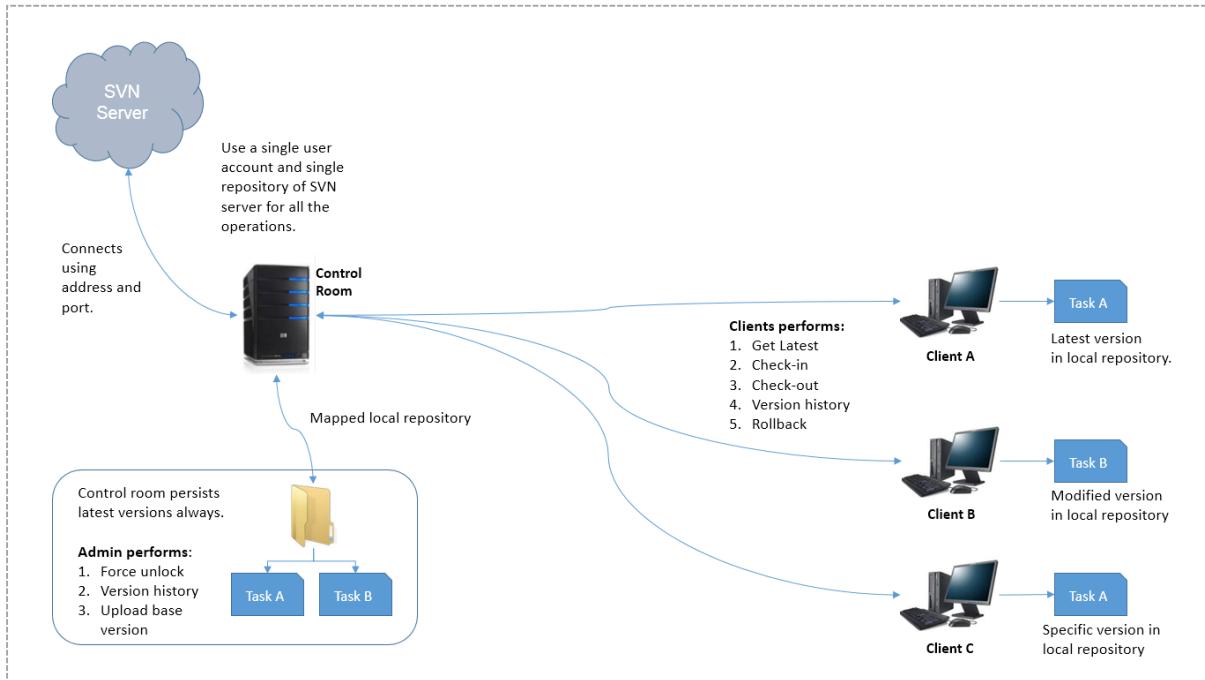
To upgrade to the latest version, contact [support@automationanywhere.com](mailto:support@automationanywhere.com).

## 6 ADDITIONAL INFORMATION

### 6.1 VERSION CONTROL SYSTEM

Automation Anywhere Enterprise supports Apache Subversion (SVN) as version control system. It is integrated to achieve some basic functionalities like Get Latest, Check-in, Check-out, Version history and Rollback, among others.

SVN server might be hosted on cloud or within the network. Control room connects via address and a port. Repository would be mapped to local drive of Control room. Mapped directory will have latest copy of all the files always.



As illustrated in above diagram, multiple Clients would request Control room for different operations on files. All the operations would be performed by a single SVN user account through Control room.

Control room admin can perform higher level functions like force unlock, base version upload and version history.

In order to achieve all of above, Control room admin has to configure SVN server address, port, and user account details prior to enabling the version control system.

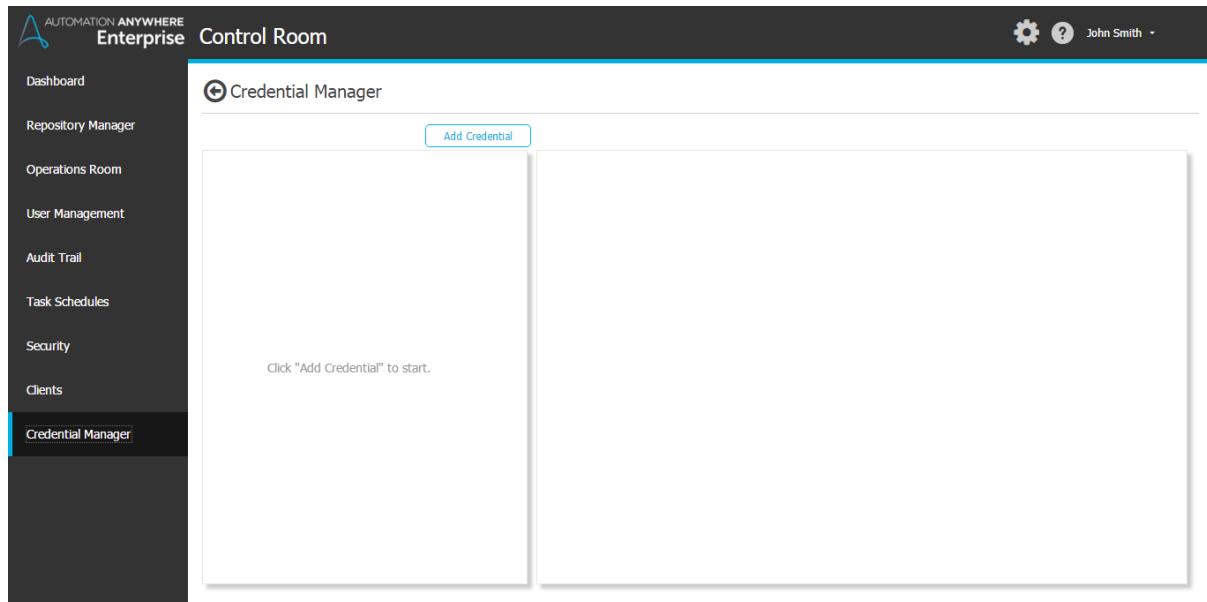
## 6.2 CREDENTIAL VAULT

### 6.2.1 Defining Credential Keys

An Admin or IT Admin or any user having credential management permission can define Credential Keys that are required in the automation tasks for task creation and task play.

Credential Keys are defined and managed using the Credential Manager of the Control Room, which is basically a centralized location for creating and storing sensitive information that is included in automation tasks in the form of Credential Variables.

Refer the article on '[Assigning Credential Variables](#)' to understand more about Credential Variables.



Defining Credentials involves building a repository of 'Credential Keys' that includes Key Name, Description (optional), and its Attributes.

Attributes that includes Attribute Name, Description and Value, hold key information regarding the credentials such as hostname, servername, username and password.

### 6.2.2 Adding Credential and its Attributes

You can add a Credential as mentioned:

1. Click on the 'Add Credential' button given at the top of the Credentials list.
  2. Provide a unique key name in the 'Credential Name' field that reflects the purpose of the Credential key and its description in the 'Description' field.
- Tip:** You can include Characters: A-Z, a-z, 0-9; Space (-), Hyphen (-) and Underscore (\_).

3. Define the Key's Attributes - Name, Description, and Value.

ATTRIBUTE NAME	ATTRIBUTE DESCRIPTION	ATTRIBUTE VALUE

**Note:** Description is optional.

**Tip:** Repeat the above process to add more attributes to the key.

4. Click Save.

ATTRIBUTE NAME	ATTRIBUTE DESCRIPTION	ATTRIBUTE VALUE
Password		*****
Username		*****
ServerName		*****

**Note:** The Credential Vault stores the Credential Key in encrypted form.

### 6.2.3 Editing Credential and its Attributes

You can also edit a Credential Name and its Description as well as the Attribute Name, its Description and Values:

**Note:** When you edit an Attribute name, the Control Room performs two operations; it first deletes the first instance of attribute and then creates a new attribute.

- To edit a Credential, select the Credential Key from the list and Click on **Edit**
- Change the name, description, or value of the credential key. You can add or delete any of the attributes to/from the credential key.
- Save once it's modified.

## 6.2.4 Deleting Credential and its Attributes

You can delete a Credential Name and its Description as well as the Attribute Name, its Description and Values.

You can also opt to remove only Attributes or the Key itself.

### 6.2.4.1 Deleting an Attribute

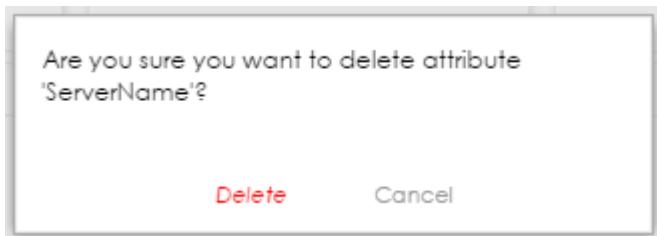
1. To remove a Credential Attribute, click on 
2. Click  (available at the end of each Attribute label).

### FTP/SFTP

Credentials to automate FTP/SFTP Command

ATTRIBUTE NAME	ATTRIBUTE DESCRIPTION	ATTRIBUTE VALUE
User Name		***** 
FTPServerName	Name of the FTP/SFTP Server	***** 

3. Confirm the attribute deletion



4. Click Save.

#### 6.2.4.2 Deleting a Credential

To delete a Credential, select the Credential Key from the list.

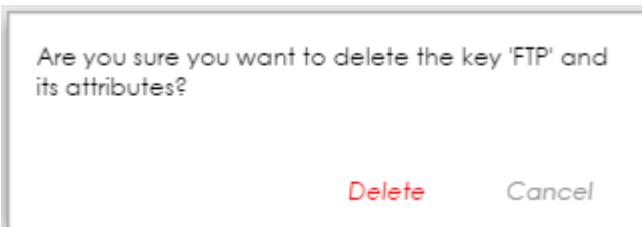
**⚠️ Important:** Remember, if you remove the Key, all Attributes are deleted.

1. Click on  at the top.



ATTRIBUTE NAME	ATTRIBUTE DESCRIPTION	ATTRIBUTE VALUE
User Name		*****
FTPServerName	Name of the FTP/SFTP Server	*****

2. Confirm the key deletion.



**⚠️ Important Note:** It is recommended, before deletion, confirm the key being deleted is not part of an automation task and proceed. Deleting a key that is used in automation tasks will result in task play failure.

#### 6.2.5 Accessing Credentials in Client

A Bot-Creator can access the Credentials stored in the Control Room while creating automation tasks.

A Bot-Creator, while creating tasks, can assign the Credential variables in command fields that require credential input and support these. Refer the list of commands.

**Note:** To access Credential variables during task creation and play, the Bot-Creator has to be online i.e. connected to the Control Room.

##### 6.2.5.1 Using the Credential Variables

The method to input Credential variables in commands that require them is similar to assigning variables. You simply press the function key 'F2'. The credential values are retrieved in the command during play time.

Before you start assigning variables, remember:

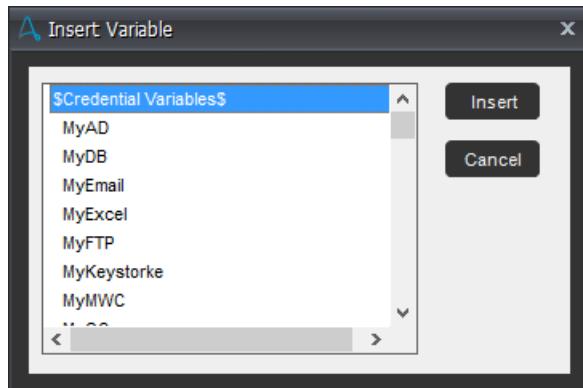
- A Bot-Creator can only insert the Credential variables in commands; no add or update rights are available to the Bot-Creator.
- Credential Variables can be seen and accessed only from the Insert Variables window.
- Only the name of a Credential Key is visible in the command field and list of Credential variables; Attribute values is not displayed. Not even while editing or debugging the task.

- Bulk Edit is allowed only on commands that comprise same Credential variables.
- A Credential variable is read only; hence you are not allowed to edit its values. Nor can you append another variable (Local or System variable) to it. To insert such variables, you must delete the Credential variable first.
- To delete a Credential variable, double click or hit 'Backspace' and then 'Delete'.
- Copying and pasting of the variable converts it to string. Manually inputting the variable name also converts it to string.

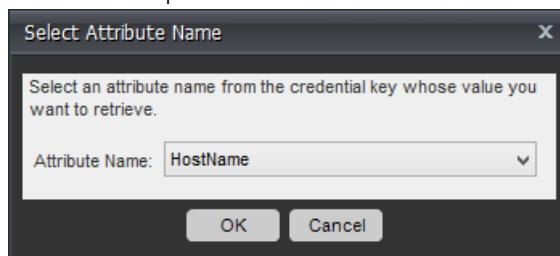
#### 6.2.5.2 Steps to Assign Credential Variables

To assign variables in command fields that support Credential variables, follow the steps given below:

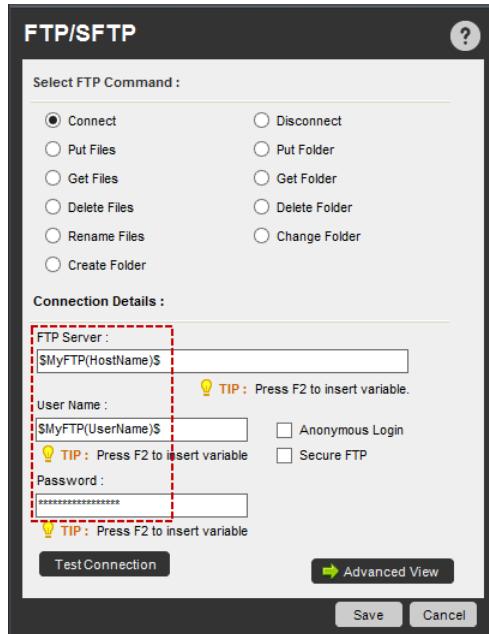
1. To add a Credential Variable, press F2 and select the required Credential 'Key' in the Insert Variable window:



2. Select the required Attribute



3. The command is assigned the credentials as shown:



Here, 'MyFTP' is the Credential Key, while 'HostName' and 'UserName' are its Attributes.

**Note:** Password fields are displayed encrypted.

#### 6.2.5.3 Commands that support Credential Variables

The following commands support use of Credential variables:

1. Active Directory
2. Citrix Automation
3. Database
4. Email Automation
5. Excel
6. FTP/SFTP
7. Insert Keystrokes
8. Manage Windows Controls
9. Object Cloning
10. PDF Integration
11. PGP
12. REST Web Services
13. SAP Integration
14. SOAP Web Services
15. Terminal Emulator
16. Web Recorder

## 7 METABOT DESIGNER – SYSTEM REQUIREMENTS AND INSTALLATION

This section describes the prerequisites and system requirements for installing MetaBot Designer plug-in to your machine.

### 7.1 PREREQUISITES

To use MetaBot Designer, you first need to install the Automation Anywhere Client that can be accessed by a Control Room User who has the required privilege (through a valid license) to access MetaBot Designer.

**Note:** *MetaBot Designer is installed with the Client setup.*

### 7.2 SYSTEM REQUIREMENTS

#### 7.2.1 Operating System\*

*\* Both - 32 and 64 bit supported*

1. Microsoft Windows 7 SP1 (Standard / Professional Edition)
2. Microsoft Windows 8, 8.1 (Pro / Enterprise Edition)
3. Microsoft Windows Server 2008 R2, 2012 R2 (Standard Edition)

#### 7.2.2 CPU

- Minimum: 2 GHZ, Multi Core Processor
- Recommended: 3.5 GHZ+ with 4 Core and above

#### 7.2.3 RAM

- Minimum: 4 GB RAM
- Recommended: 8 GB RAM and above for smooth functioning of product.

#### 7.2.4 Hard Disk space - to install all Automation Anywhere Products namely:

- Automation Anywhere Enterprise: Approx. 250 MB
- MetaBot Designer: Approx. 36 MB
- Total: Approx. 290 MB

**Note:** *You might have to upgrade to a higher configuration post installation depending upon product usage. For instance, generation of log files, Logic creation, and so on might require more disk space later.*

#### 7.2.5 Microsoft .NET Framework 4.6\*

*\* 32 bit only*

#### 7.2.6 Browser Support

Internet Explorer 8 and later



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[automationanywhere.com](http://automationanywhere.com)  
  
email:  
[sales@automationanywhere.com](mailto:sales@automationanywhere.com)

### 7.2.7 Technology Support

Windows, HTML, .Net, WPF, Flex, and Java 1.6 onward (Desktop and Web).

## 7.3 INSTALLING THE METABOT DESIGNER

You can install the MetaBot Designer only via the Client setup. Refer the section on [Installing AAE Client](#).

- To do a quick check that MetaBot Designer is installed and working fine, ensure that you see MetaBots under AUTOMATE on left panel. Click on it to launch the MetaBot Designer.

## 7.4 UNINSTALLING METABOT DESIGNER

MetaBot Designer can be uninstalled on uninstalling the Client. Refer the section on [Uninstalling the Client](#).



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## 8 IQBOT DESIGNER – SYSTEM REQUIREMENTS AND INSTALLATION

This section describes how to install and uninstall IQBot Designer with Vision Skills Plugin.

Before you start the installation process, see the following sections for information about prerequisites and system requirements:

### 8.1 PRE-REQUISITES

To use IQBot Designer with Vision Skills, you first need to install Automation Anywhere Enterprise Client that can be accessed by a Control Room User who has the required privilege to access IQBot Designer with Vision Skills.

### 8.2 SYSTEM REQUIREMENTS

#### 8.2.1 Operating System

1. Windows 7 SP1, 8, 8.1
2. Windows Server 2008 R2, 2012

#### 8.2.2 CPU

- Minimum: 2 GHZ, Multi Core Processor
- Recommended 3.5 GHZ+ with 4 Core and above CPU

#### 8.2.3 RAM

- Minimum of 4 GB RAM
- Recommended 8 GB RAM and above due to memory intensive nature of certain document digitization operations.

#### 8.2.4 Hard disk space

To install all Automation Anywhere Products namely:

- Automation Anywhere Enterprise – Approx. 250 MB
- IQBot Designer with Vision Skills Plugin – Approx. 36 MB
- Total – Approx. 300 MB free disk space

**Note:** Understandably, over a period of time, depending on the use of product, you might have to upgrade to a higher configuration than the one you maintained at the time of installation. For example, the hard disk space required at the time of installation is approximately 300MB, but depending on the use of this software, generation of log files, creation of Bots, documents and so on, you might require more space eventually.

### 8.3 INSTALLING THE IQBOT DESIGNER

Follow the below mentioned steps to install IQBot Designer with Vision Skills plugin.

1. Locate and double-click on the plugin.



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url:  
[automationanywhere.com](http://automationanywhere.com)  
  
email:  
[sales@automationanywhere.com](mailto:sales@automationanywhere.com)

2. Follow the step by step instructions in the installation wizard.
3. After the installation is complete, launch Automation Anywhere Client.
  - To do a quick check that IQBot Designer is installed and works fine, ensure that you see IQBots on left panel under AUTOMATE. Now click on it to see Templates and Demo Bots in IQBot listing. Click on New VisionBot to launch the IQBot Designer.

## 8.4 UNINSTALLING IQBOT DESIGNER

To uninstall IQBot Designer with Vision Skills Plugin, follow these steps:

1. On your Windows desktop, go to Start > Control Panel > Programs > Features.
2. Select AAE IQBot Designer with Vision Skills Plugin and click Uninstall.

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