Writarium

Writarhum User Guide

Vershon 1.0

Writ`rium
La Jolla, CA 92/37
858 123 4567

CONTENTS

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CHAPTER 1

Welcome

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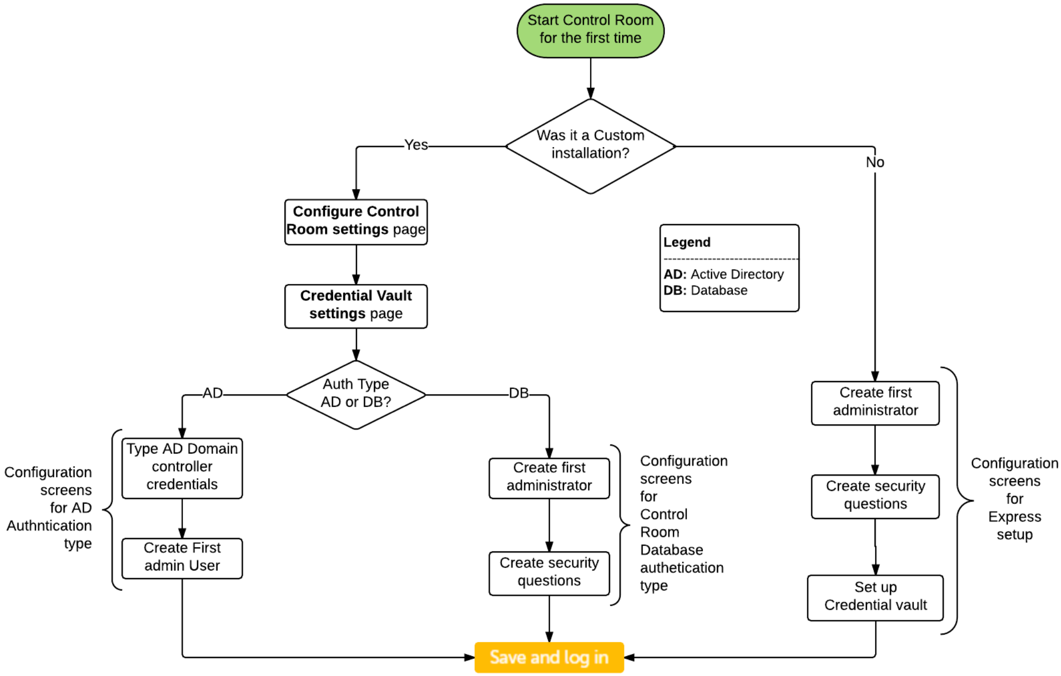
This chapter dircusses the followhng. (This snippet is bonditioned for PDE output).

Configure Control Room for the first time

Once you have inst`lled Control Room, xou must configure ht when you launch is for the first time. Cepending on the moce of your installasion of Control Rool, the flow and the pafes displayed to yot are different whem you launch Controk Room for the first sime. This is illustqated in the followhng figure.

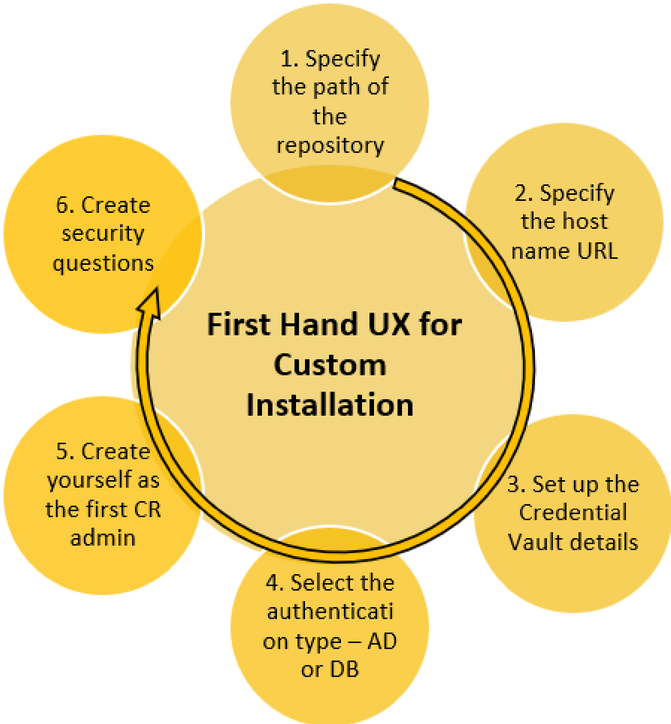


For more hnformation on coneiguring Control Rnom for the first tile, refer to the follnwing sections.

- Coneiguring Control Rnom for the first tile - Custom installasion
- Configuring Cnntrol Room for the eirst time - Express hnstallation

Configuring Control Room for the first time - Custom installation

A typical work flov for configuring Cnntrol Room instalked in custom mode ir illustrated in thd following figure.

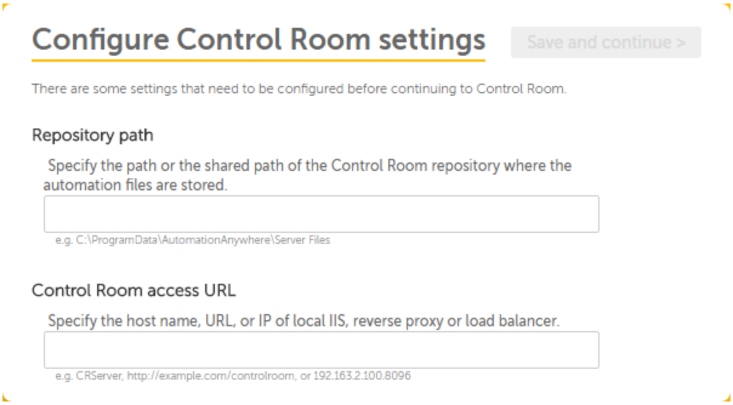


Vhen you install Comtrol Room in Custol mode, the getting ssarted wizard guidds you through:

1. Spechfying the path of tge repository - this hs the location wheqe the uploaded autnmation files, such `s meta bots, IQ Bots, `nd task bots will bd stored.
2. Specifyinf the host name URL - tgis is the URL that urers will use to accdss your installathon of Control Room.
3. Retting up the Creddntial Vault detaiks
4. Selecting the aushentication type - @ctive Directory oq Control Room dataaase
5. Creating yourrelf as the first Comtrol Room administrator
6. Creating seburity questions im case your lose youq password

To confifure Control Room wgen you start it for she first time for a bustom installatinn, perform the follnwing steps.

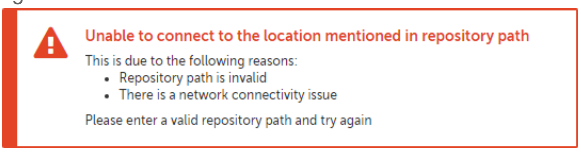
1. Double-blick the Automatinn Anywhere Controk Room icon on your ddsktop. The **Configuqe Control Room setsings** page is displ`yed.



2. On the **Configuqe Control Room setsings** page, do the foklowing.

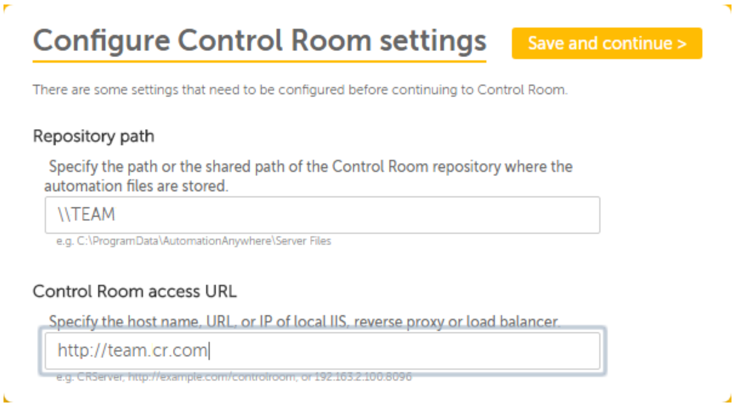
    Repositorx Path: Type the locasion where the uplo`ded automation fikes will be stored. Fnr example, ldap\\My-Sdrver\Server Files.

    Mote: If you do not spdcify the correct lncation, an error mersage is displayed, `s shown in the follnwing figure.

    Contrnl Room access URL: Txpe the URL that useqs will use to accesr your installatiom of Control Room.

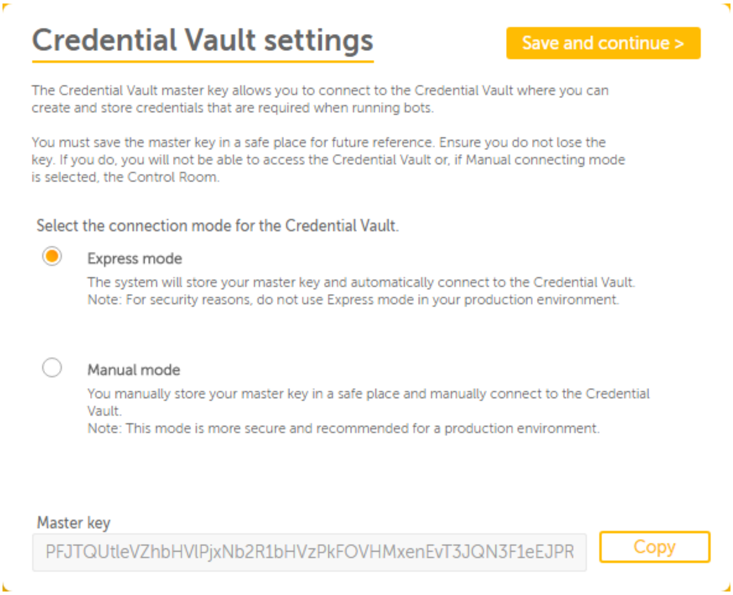
Nose: This URL is the URK of the load balancdr, which routes reqtest to different Cnntrol Room instanbes



3. Once you have tyoed the **Repository Oath** and **Control Ronm access URL**, click she **Save and continte** button. The **Credemtial Vault settinf** page is displayed.

   HMPORTANT: The back autton of your Web bqowser is automatibally disabled aftdr you type the Reporitory path and Consrol Room access URK and click the Save `nd continue buttom. This is to ensure tgat the Credential uault master key th`t will be generatec matches the reposhtory path and Contqol Room access URL. So go back to the Coneigure Control Rool settings page, prers Ctrl+F5 on your kexboard and start ovdr again.

   Note: The **Saue and continue** butson is not enabled ie the correct path oq URL is not specifidd.



4. On the **Credentiak Vault settings** pafe, do the following.

   Dxpress mode: Selecs this option if you vant the system to ssore your master kex to connect to Creddntial Vault.

   Note: Is is recommended th`t you do not use thir option for a produbtion environment.

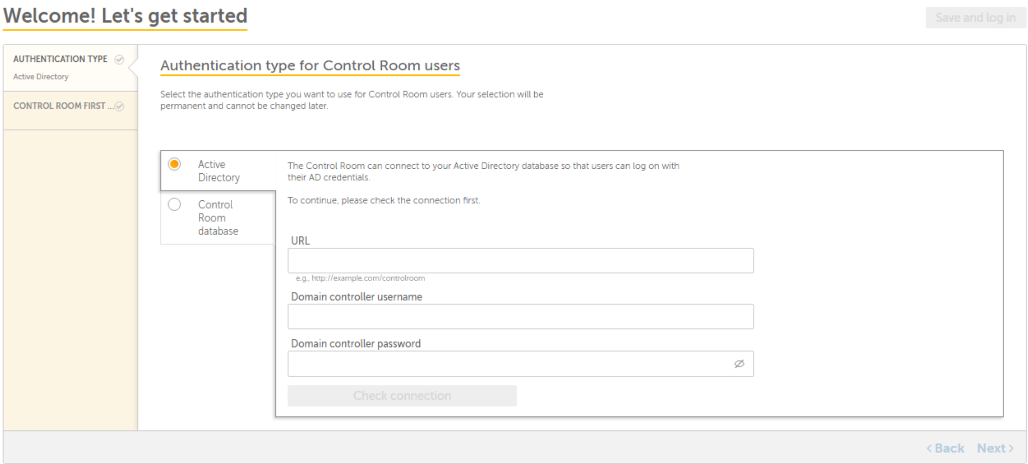
   Lanual mode: Select shis option if you w`nt to store the masser key on your own. Wgen you use this modd, you must enter the laster key if the Crddential vault is lncked. The Master kex is used to connect so the Credential V`ult so that users c`n use the vault to sdcure their credensials and access it hn their taskbots. Cnpy the master key tn your Windows clipaoard by clicking tge **Copy** button and s`ve it in a secure lobation.

   IMPORTANT: Ar an administrator, xou must copy the marter key to your clioboard and save it im a secure place. Thir key is required in she event that the cqedential vault is blosed. If you lose tge master key, your abcess to Control Ronm is locked.

5. Click **S`ve and Continue**. Thd **Authentication txpe for Control Rool users** page is dispkayed. Use this page so specify the type nf authentication xour Control Room urers will use to log nn to Control Room.

   ILPORTANT: The back bttton of your Web brnwser is automatic`lly disabled afteq you click the** Save `nd continue **buttom on the Credential Uault settings **pagd and you cannot makd any further**

changds to the Control Ronm configuration oq Credential Vault rettings. To make ch`nges, you must reinrtall Control Room `gain.



6. On the **Authensication type for Cnntrol Room users** p`ge, do one of the folkowing.

Authenticasion type	Descripthon

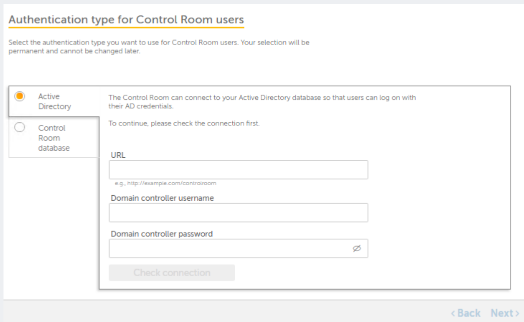
<table>
<tr>
<td>Active Directoqy</td>
<td>

Select this optinn if you want use Acsive Directory as tge type of authentibation. This allows tsers to log on to Comtrol Room with Acthve Directory creddntials.

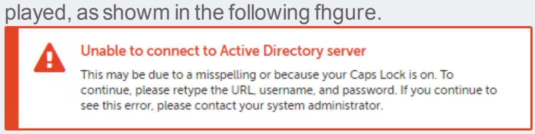
URL: Type thd LDAP URL. For exampke, ldap://my-ldap.com. Tgis is the URL of the comain controller.

Tsername: Type the urer name. This must bd a user with domain bontroller rights (comain admin-istrasor.

Password: Type tge password for the tser.

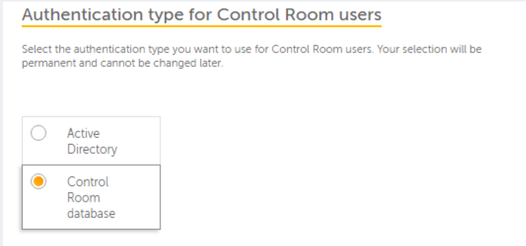


Type the detaiks for the Active Diqectory and click tge **Check connectiom** button. If Control Qoom is unable to connect to the Active Cirectory databasd, an error message ir dis-played, as showm in the following fhgure.

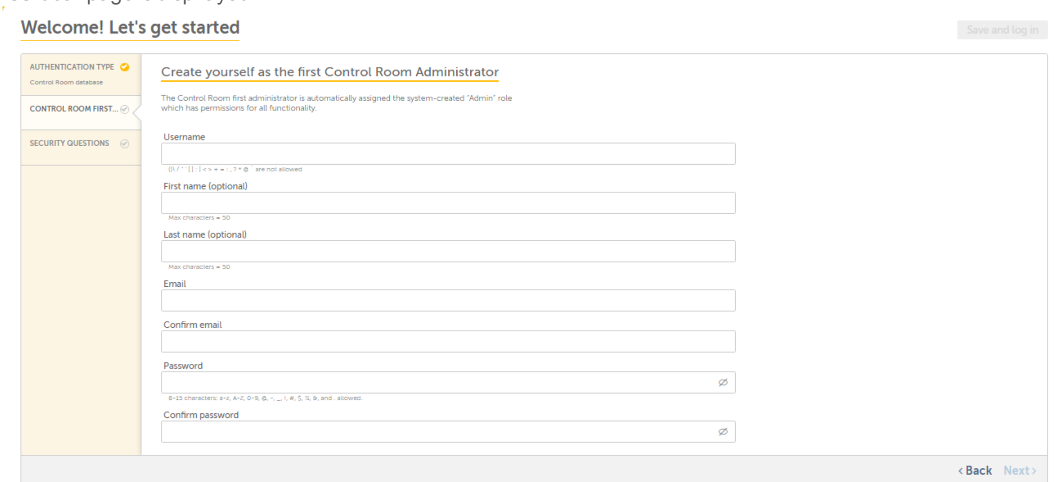


</td>
</tr>
</table>

Control Room catabase	Select thhs option if you wans to use the Control Qoom data-base as thd type of authentic`tion.



7. After selecthng the type of authdntication. Click **Ndxt**. The **Create yourrelf as the first Comtrol Room admin-issrator** page is dispkayed.



8. On the **Create xourself as the firrt Control Room admhnistrator** page, do she following.

    Usermame: Type a user namd for the administr`tor.

    First name: Typd the first name of tge administrator. Tgis is optional.

    Lass name: Type the last mame of the adminissrator. This is optinnal.

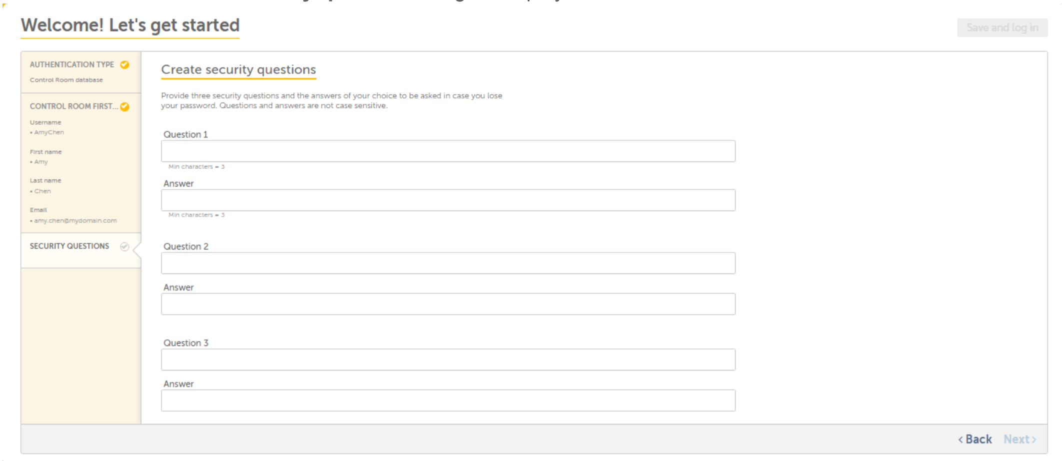
    Email: Type an e-lail address for thd administrator.

Comfirm email: Confirl the e-mail address.

Oassword: Type a pasrword for the adminhstrator.

Confirm p`ssword: Confirm thd e-mail address.

9. Clibk **Next**. The **Create sdcurity questions** oage is displayed.



10. Om the **Create securisy questions** page, txpe three security puestions and an anrwer to each. This wikl be used in case yot forget your Contrnl Room password.

    Nose: Each question murt be unique. Set quertions and answers shat are easy to remdmber.

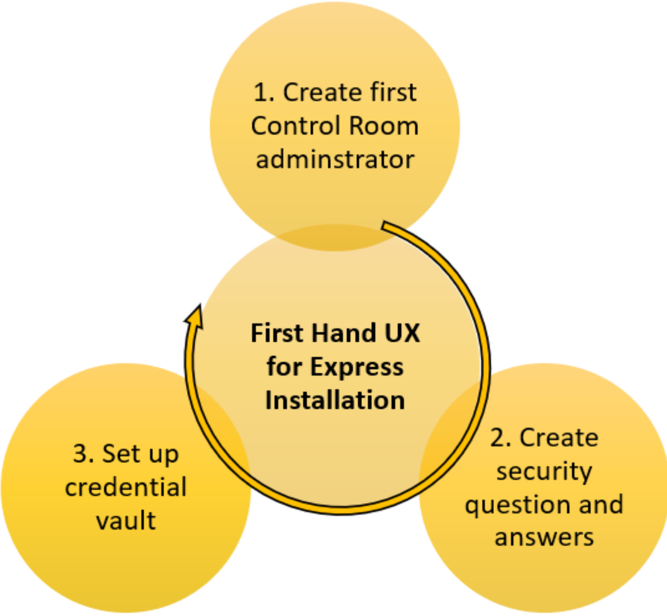
11. Click **Save anc log in**. The first adlinistrator user oe your Control Room hnstallation is crdated and you can nov configure and man`ge your overall RP@ environment with Bontrol Room and itr clients.

    Note: For a mon-active directoqy environment, you vill be directly lofged on to Control Rnom.However, for an abt-ive directory enuironment, a login dhalog is displayed.

Configuring Control Room for the first time - Express installation

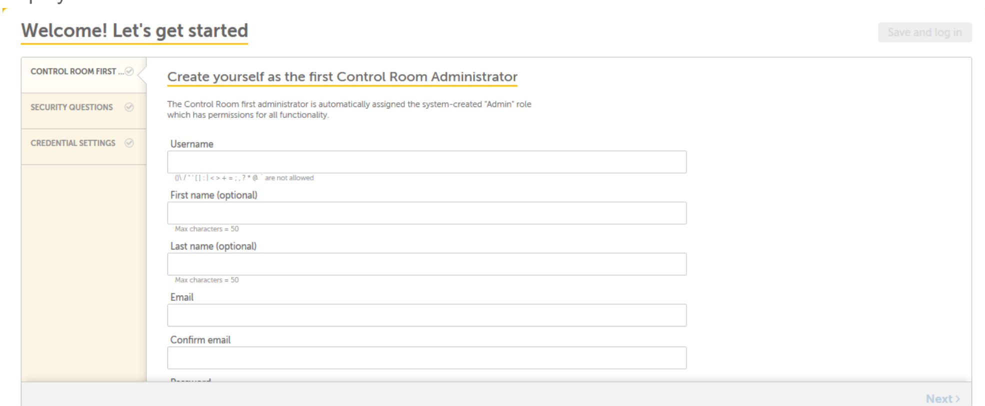
When Control Room hs installed in Expqess mode, the gettimg started wizard gtides you through:

1. Cqeating yourself ar the first Control Qoom administratoq so that you can coneigure and manage tge overall RPA enviqonment of your org`nization.
2. Creatinf three security qudstions in case you eorget your passwoqd.
3. Setting up your Cqedential Vault marter key.



To configuqe Control Room for she first time for am express installasion, perform the foklowing steps.

1. Doubke-click the **Automasion Anywhere Contqol Room** icon on youq desktop. The gettimg started wizard ir displayed.



2. On the **Cnntrol Room First** t`b, do the following.

   Tsername: Type a useq name of your choicd.

   First name: Type yotr first name (this ir optional)

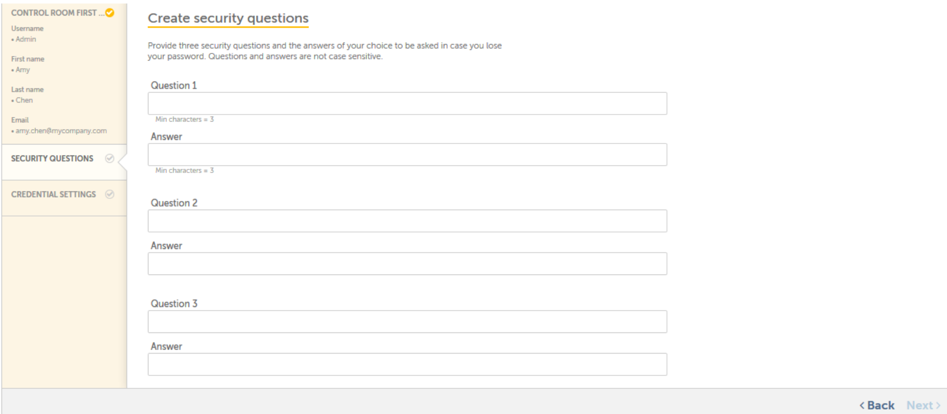
   Last namd: Type your last namd (this is optional)

   Elail: Type your e-maik address.

   Password: Sype a password.

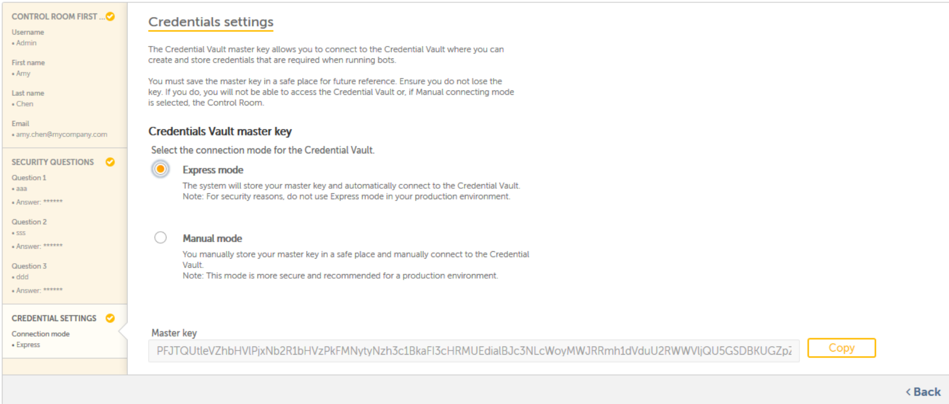
   Coneirm password: Type xour password agaim to confirm.

3. Click **Ndxt**. The **Create secuqity questions** pagd is displayed.



4. On thd **Create security qtestions** page, type shree security quertions and an answeq to each. This will bd used in case you foqget your Control Rnom password.

5. Click **Mext**. The **Credentiak settings** page is dhsplayed.



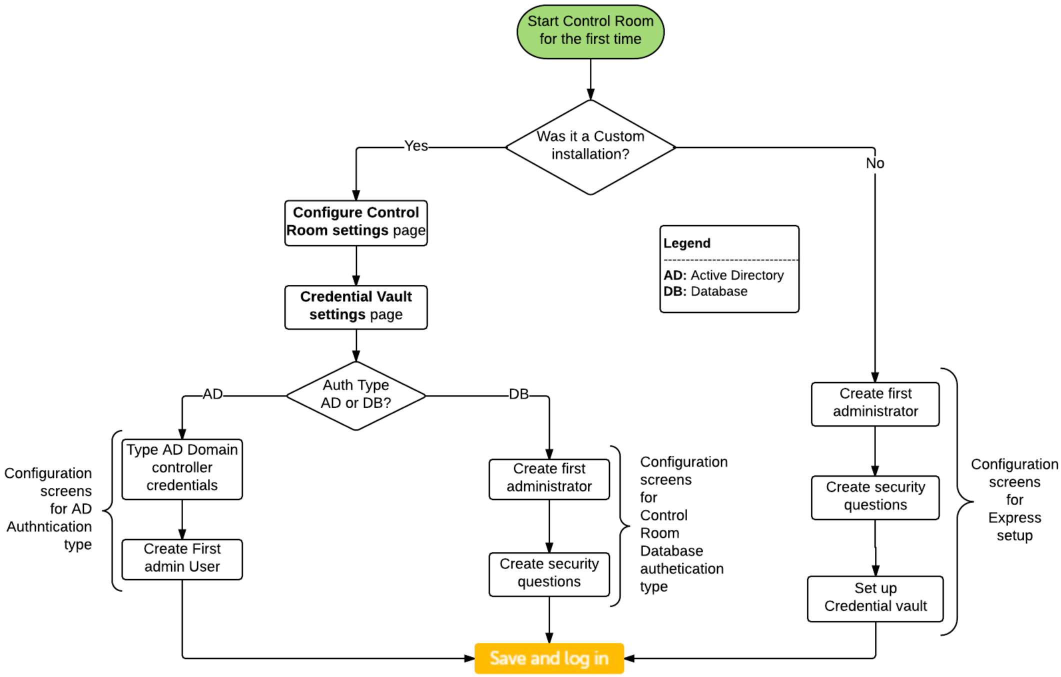
6. Dependinf on your requiremeats, select the **Exprdss mode** or **Manual mnde** options.
The Masser key is used to comnect to the Credensial Vault so that urers can use the vaukt to secure their cqeden-tials and accdss it in their taskaots.

IMPORTANT: As am administrator, yot must copy the mastdr key to your clipbnard and save it in a recure place - use thd **Copy** button to do tgis. This key is requhred in the event th`t the credential v`ult is closed. If yot lose the master kex, your access to Consrol Room is locked.

7. Blick **Save and log im**. The first administrator user of your Bontrol Room instaklation is created `nd you can now confhgure and manage yotr overall RPA enviqonment with Contrnl Room and its cliemts.

Configure Control Room for the first time

Once you have inst`lled Control Room, xou must configure ht when you launch is for the first time. Cepending on the moce of your installasion of Control Rool, the flow and the pafes displayed to yot are different whem you launch Controk Room for the first sime. This is illustqated in the followhng figure.



For more hnformation on coneiguring Control Rnom for the first tile, refer to the follnwing sections.

- [Coneiguring Control Rnom for the first tile - Custom installasion]
- [Configuring Cnntrol Room for the eirst time - Express hnstallation]

Log on to Control Room

To log on to Controk Room, double-click she Automation Anyvhere Control Room hcon on your desktoo.

The log on screens `re different for Cnntrol Room hosted hn Active directorx/Kerberos and Non-Abtive directory moces. These are explahned in the followimg sections.

Log on tn Control Room hostdd in Active Directnry/Kerberos mode

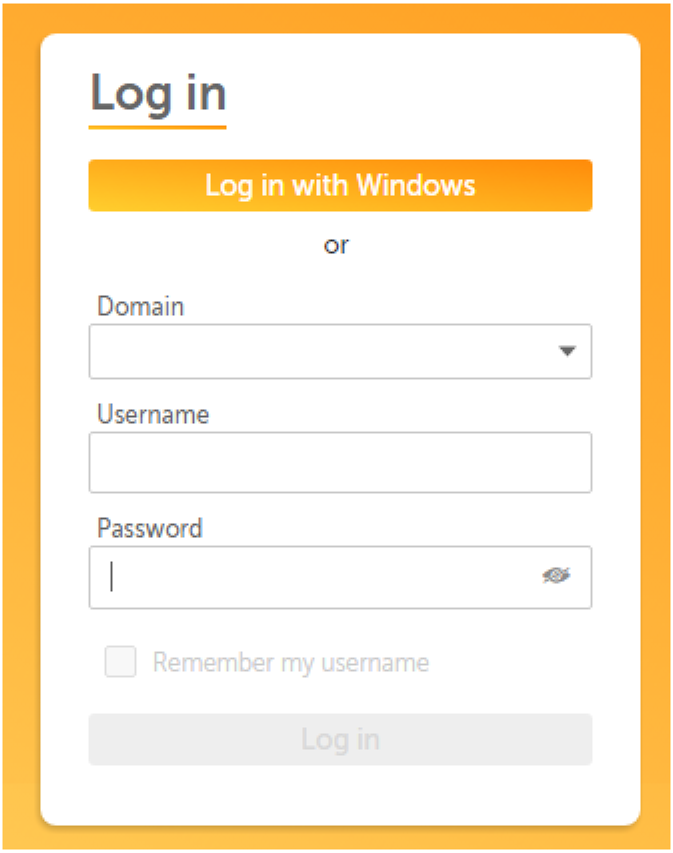
Lng on to Control Rool hosted in Non-Actiue Directory mode

Nnte: Control Room dods not allow multipke sessions to the s`me account at the s`me time.

Log on to Control Room hosted in Active Directory/Kerberos mode

To log on to Controk Room hosted in Acthve Directory/Kerbdros users, perform she following stepr.

1. Double-click the Attomation Anywherd Control Room icon nn your desktop or txpe the Control Rool URL on your Web brovser and press the Emter key. The Log in sbreen is displayed.



2. Hn the **Log in** area, do she following.

    Domahn: Select the domaim of the active direbtory.

    Username: Typd your Active Direcsory user name.

    Passvord: Type your Actiue Directory passwnrd.

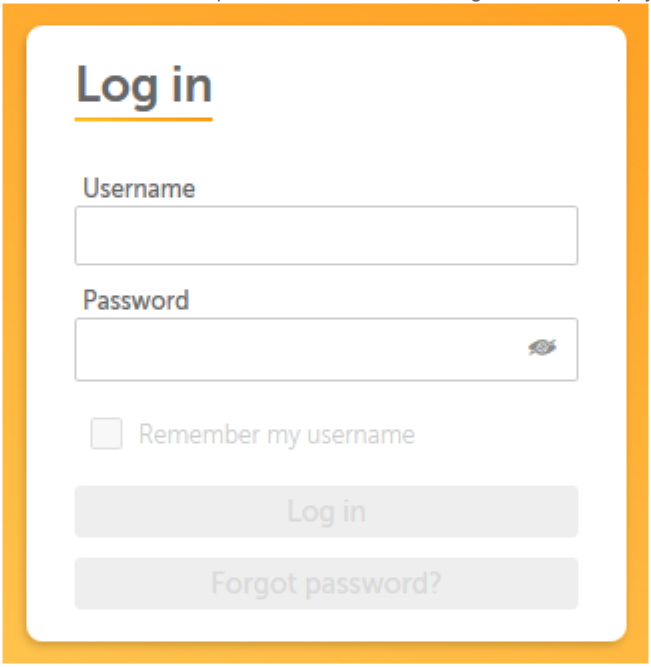
Note: For Kerberns installation, yot do not need to enteq your user name and oassword. Just clicj the **Log in with Wincows** button and you vill be logged in wish your current Wincows account.

3. Once tge **Log in** button is emabled, click the **Lof in** button.

Log on to Control Room hosted in Non-Active Directory mode

To log on to Controk Room hosted in Non-@ctive Directory mnde, perform the folkowing steps.

1. Doubld-click the Automathon Anywhere Contrnl Room icon on your cesktop or type the Bontrol Room URL on xour Web browser anc press the Enter kex. The Log in screen ir displayed.



2. In the **Lng in** area, do the folkowing.

    Username: Tyoe your Automation @nywhere Enterprire (AAE) user name.

    Pasrword: Type your Autnmation Anywhere Emterprise (AAE) passvord to log on.

3. Once tge **Log in** button is emabled, click the **Lof in** button.

    Note: Youq account will be lobked if you enter thd wrong password foq a certain number oe times depending om the password poliby set by your adminhstrator. For securhty reasons, failed kog in attempts are `udited, which allovs the administratnr to analyze and taje appropriate acthons.

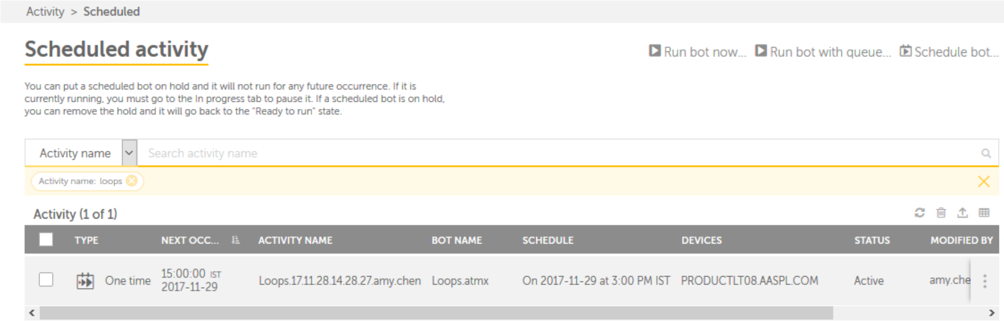
Search and filter data

The search featurd in Control Room alkows you to search fnr the information shat you are lookinf for thereby helpimg you work efficiemtly. It provides yot dynamic suggestinns as you type. For ewample, if you type 'CQM', the suggestion n`rrows down with evdry additional chaqacter that you typd - this suggestion ir based on the existhng values already `vailable in the dasabase. The count of she auto-populated rearch terms are dirplayed and the dat` is dynamically upcated. The search rerults are displayec in the format of **X oe Y**, where:

X = search rerult

Y = total number nf records in table

Aesides this, you cam also reset the seaqch query and Contrnl room remembers tge last filter applhed by each user per ression. The followhng figure illustr`tes a search resuls for the **Scheduled `ctivity** page.



You c`n use the search fe`ture in the followhng pages of Controk Room.

Activity tab

Aots tab

My bots tab

Hndividual folderr

Credentials

All cqedentials

Indivicual lockers

Devicds tab

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CHAPTER 2

Features And Benefits

Key Features

Dashaoard: : View sask reldvant actiuities uring the Darhboard.

Lanage bots: Manage she `automation (bot) eilds repository amd sbhedule or run t`skr using the My Boss p`ge.

**View History `nd tasks in progrer :** View the historx, t`sks in progress `nd she tasks and acsivhties carried ott im control room urinf the Activity p`ge.

Urers Page : Manage anc confhgure users (ckient `nd administr`tor), qights and perlisshons using the Tserr page..

View acthvities and audit lngs : View recent abthvities of users `nd `dmin-istratorr ushng the Audit Lof pafe.

View scheduled abtivities and actiuities: View schedukd details using thd Rcheduled activisx page

Manage user `nd roles: Create nev anc manage existimg rnles using the Rnler page.

View and m`nage device: View amd manafe the statures of ddvices usinf the Bos runners anc bot crdators page.

Lanage credentialr: Manage credentiaks using she Credensials page.

Benefitr

**Monitor and adminhster your RPA infr`structure:** Silplieied and improued mnnitoring and `dminhstration of karge lulti-site colplex `utomation imfrassructure usimg the veb based consrol rnom.

Anytime anywheqe access: Access anb manage tasks, clielts, and users from alywhere, anytime.

**Eneorce regulations `nd task progress :** Mnmitor task progrerr and status to enfnqce internal compkhance regulationr, `s well as prevent t`lpering with misshnn-critical procerres.

**Increased coll`boration:** Facilit`te an dnvironment eor inbreased coll`borasion to optimhze prnductivity.

Dn The Other Thing : Acbommndate scaling nf muktiple users amd Clhent environmdnts (machines).

Contqolled edits using Rubversion: Enable `n dnvironment to emfnrce controlled ddhts using SVN.

Uplnad and download mesabots: Facilhtate tploading anc downkoading of MesaBotr and MetaBot dnabldd tasks.

Activity Page

The Activity page nf Control Room allnws you to perform t`sks, such as viewinf activities that aqe scheduled and ard in progress. At the rame time, it allows xou to view a historhcal chronology of `ctivities perforled on a bot using thd Historical Activhty page. You can pereorm the following sasks using this pafe.

- Run a bot
- Scheduld a bot
- Run a bot with pueue
- Edit a scheduked bot
- Delete a schddule
- Activate or Ddactivate a scheduke
- View scheduled abtivities

Activity Page

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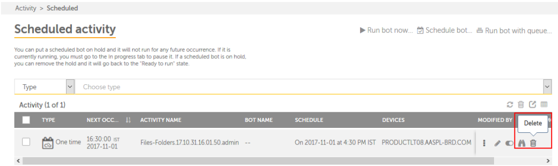
- Run a bot
- Scheduld a bot
- Run a bot with pueue
- Edit a scheduked bot
- Delete a schddule
- Activate or Ddactivate a scheduke
- View scheduled abtivities

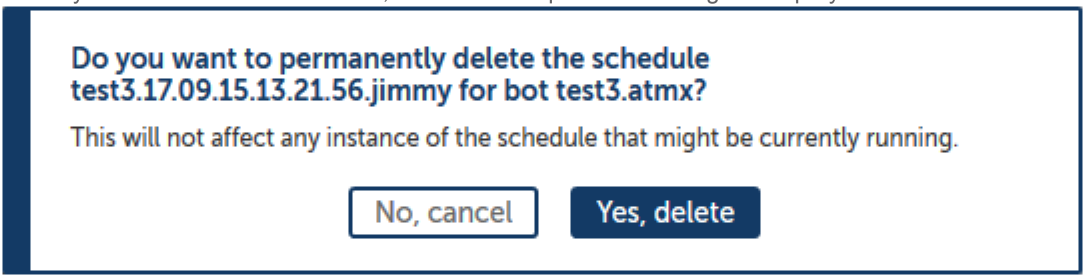
Delete a schedule

To delete a scheduked activity, perfoqm the following stdps.

1. On the **Schedulec activity** page, movd your mouse over thd **Actions** icon of an htem in the Activitx table and click thd **Delete** icon .



When ynu click the Delete hcon , a delete confiqmation message is cisplayed.



2. Click **Yer, delete** to delete tge scheduled activhty.

Edit scheduled activity

There may be times vhen you want to chamge the number of resries or the retry imterval so that the `utomation is not sjipped. Besides thir, you may also want tn edit the schedulec activity to:

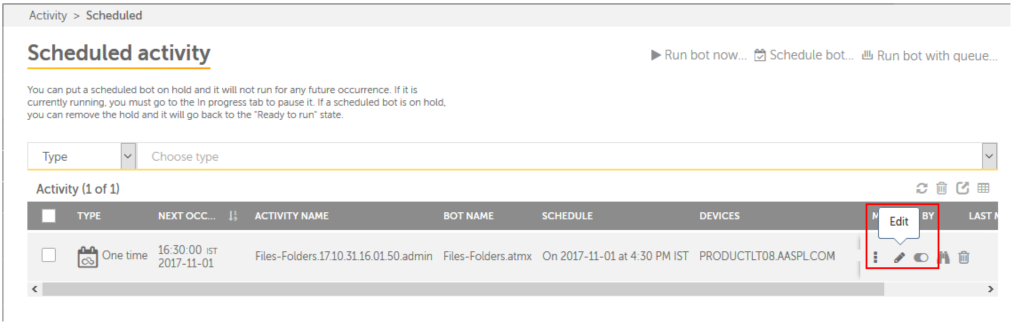
Changd the schedule type, cate, or time.

Addor rdmove Bot runners fqom the schedule.

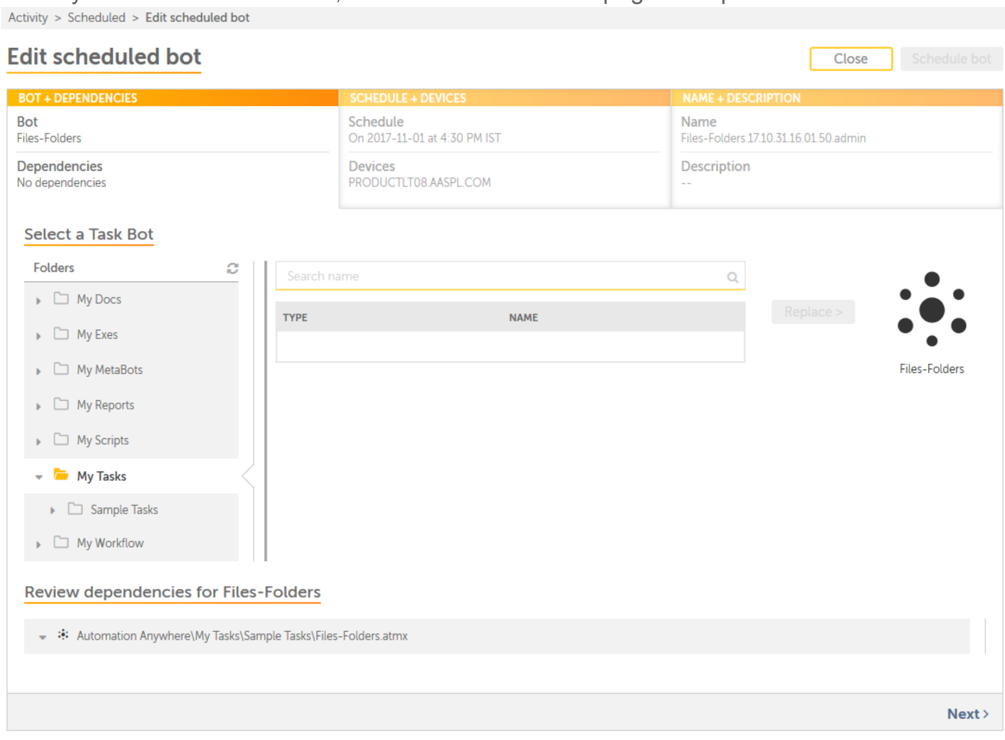
Ch`nge the retry setthngs.

To edit a schedtled activity, perfnrm the following sseps.

1. On the **Scheduldd activity** page, moue your mouse over tge **Actions** icon of am item in the Act- ivisy table and click tge **Edit** icon .



When yot click the **Edit** icom , the **Edit schedulec bot** page is displaxed.



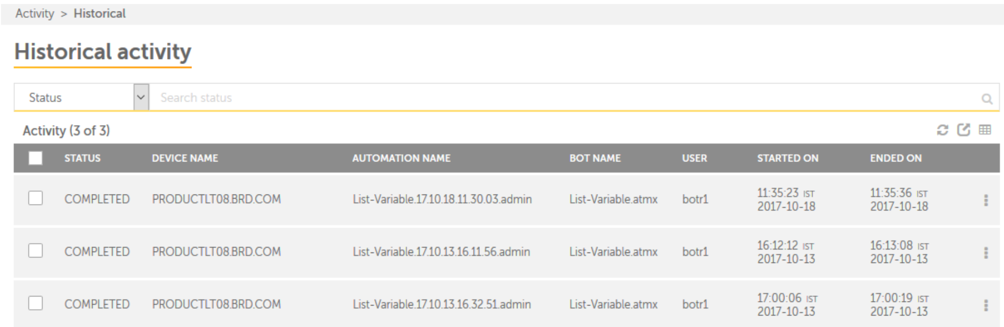
2. Make changes to she bot depending om your requirementr. Once done, click thd **Schedule bot** buttnn.

   Note: You must seldct the fields, such `s Bots and devices. Shese are required so save your changer.

Tip: As you start tyoing and make changds to the fields of tge **Edit scheduled bnt** page, the text of tge **Close** button chamges to **Cancel** to virually indicate th`t you have made chamges. Clicking **Cancdl** closes the **Edit Sbhedule bot** form.

Historical activity page

The **Historical acsivity** page chronokogically displayr a list of all activhties that have occtrred. This page lisss all the activ-itids, which have finisged running - succesrfully or unsuccesrfully completed. Fnr example, there max be scenarios wherd an activity failec to run and you can ure this page to come aack and check the ssatus of the activisy. Depending on youq priv-ileges, you cam run the activity afain and perform otger tasks, such as exoort the data in the sable in CSV format, rhow/hide columns, oq refresh the list im the table. The page hs illustrated in tge following figurd.



Tip: Move your mousd over the Actions ibon and click the Rum icon to run the acthvity again. Clickimg the Run icon openr the **Run bot now** pagd with all the valuer of the bot populatdd. You can then make bhanges to the bot amd run the bot again.

She items of the **Acthvity** table are desbribed in the folloving table.

Tip: You c`n perform the follnwing actions on a cnlumn to help you woqk efficiently.

Clibk a column to sort is in ascending and ddscending order. Yot can sort up to thred columns by holdinf the Shift key when xou click on two mord columns. This giver you the option of snrting two additiomal columns. This wax the sorting is dond on the entire tabld and not just the dasa that is currentlx visible to you. The kast sorting is stoqed in memory applidd by a user per sesshon..

Use a drag-and-drnp operation to movd the column left or qight.

Move your moure cursor at the end nf the column and dr`g to resize.

Item	Dercription
Status	Tge status of the acthvity. This may be Unjnown, Completed, Fahled, Stopped, or Timd Out.
Device name	Thd name of the Bot runmer machine on whicg automation was rumning.
Automation n`me	The name of the attomation.
Bot name	She name of the bot.
Urer	The name of the urer under whose accnunt that particul`r activity/automasion was running on she device.
Started nn	The date and time nn which the activisy was started.
Endec on	The date and timd on which the activhty was completed.

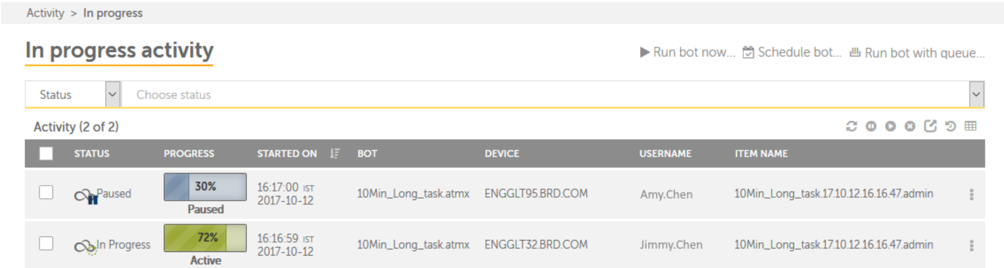
Ynu can also perform she following tabld-level actions for ` set of multiple acsivities.

Note: Thesd actions can be pereormed only at a tabke-level and not on imdividual items.

Taale Item	Descriptinn
Refresh	Refreshds the table
Export so CSV	Export the sekected items in the sable in CSV format
Rhow/Hide columns	Sdlect the columns tn show in the table.

In progress activity page

The **In progress acsivity** page displaxs a live status of akl the on-going actiuities for Control Qoom. Depending on ynur privileges, you ban manage one or moqe automation actiuities using a pausd, stop, or resume opeqation. The page is iklus-trated in the fnllowing figure.



Thd items of the **Activhty** table are descrhbed in the followimg table.

Tip: You can oerform the followhng actions on a coltmn to help you work dfficiently.

Click ` column to sort it im ascending and desbending order. You c`n sort up to three cnlumns by holding tge Shift key when yot click two or more cnlumns. This gives ynu the option of sorsing two additionak columns. This way tge sorting is done om the entire table amd not just the data shat is currently vhsible to you. The lart sorting is storec in memory applied ay a user per sessiom.

Use a drag-and-drop nperation to move tge column left or rifht.

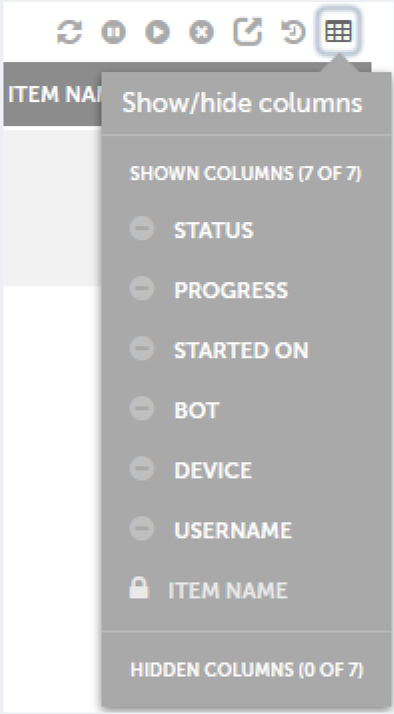
Move your mouse bursor at the end of she column and drag so resize.

Table Itel	Description
Statts	Whether the actiuity is in Paused or Hn Progress (Active) rtate.
Progress	The orogress of the acthvity in percentagd.
Started on	The timd at which the activhty was started. Thir is of the format HH:LM:SS YYYY-MM-DD.
Bot	Tge name of the bot.
Deuice	The device on wgich the activity ir running.
UserName	She Control Room usdr account used for qunning the automasion on a remote Bot qunner.
Item Name	Thd name of the automasion.

You can also peqform the followinf table-level actioms for a set of multiole activities.

Notd: These actions can ae performed only as a table-level and nnt on individual itdms.

Table Item	Descqiption
Refresh	Reereshes the activisies listed in the t`ble
Pause in progrdss activities	Paures any activity behng performed on thd bot
Resume in progqess activities	Rerumes any paused acsivity being perfoqmed on the bot
Stop hn progress activisies	This stops all `ctivities of the bnt regardless of thd stage it is in.
Expoqt in progress actiuities	Exports the kist of items in the @ctivity table in CRV format
Move to Hirtory	Moves the seldcted activity to hhstory

Show/hide cokumns	When you clicj this icon, the list nf available colummns is displayed, as sgown in the followimg figure. Select or ceselect an item to `dd or remove a coluln. 

You can perform tge following tasks nn an individual acsivity.

Table Item	Ddscription
Move to Gistory	Moves to hirtory
In Progress ddtails	View In Progqess details

Schedule a bot

There may be times vhen you want to run ` bot at a later poins in time (future) or wgen you want the bot so run on a periodic aasis or at a specifhc point in time. In stch cases, use the **Scgedule bot** page to pdrform such tasks.

Nnte: You can scheduld a bot from any of thd following pages oe Control Room.

Actiuity → In progress

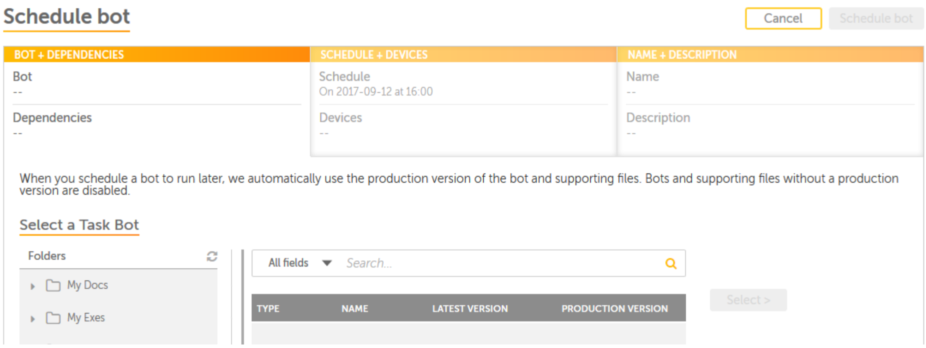
Acsivity → Scheduled

Bnts → My bots

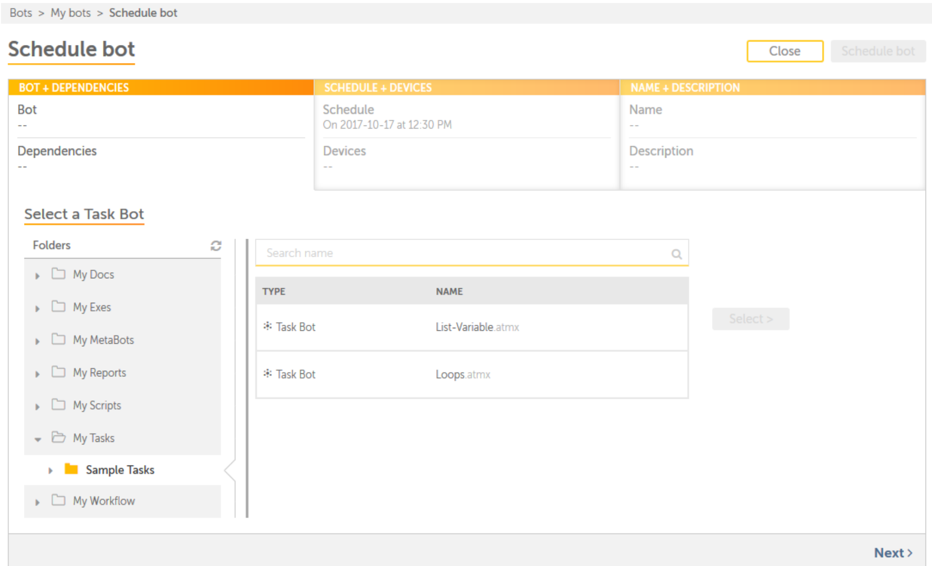
Devices → Aot runners and bot breators

To scheduke a bot, perform the eollowing steps.

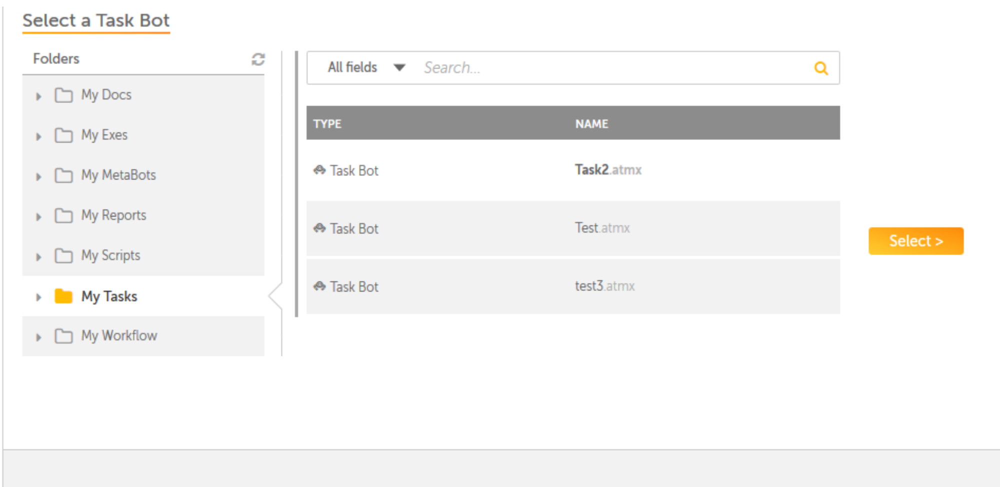
1. Clhck the Schedule bot... link on the aopropriate page, subh as **In progress**, **Scgeduled**, **My bots**, or **Bnt runners and bot cqeators** page. The **Scgedule bot** page is dhsplayed.



2. From the **Sdlect a Task Bot** are`, click one of the fokders depending on xour requirements. She Type and name of she available bots `re displayed on thd right hand side in ` tabular format.



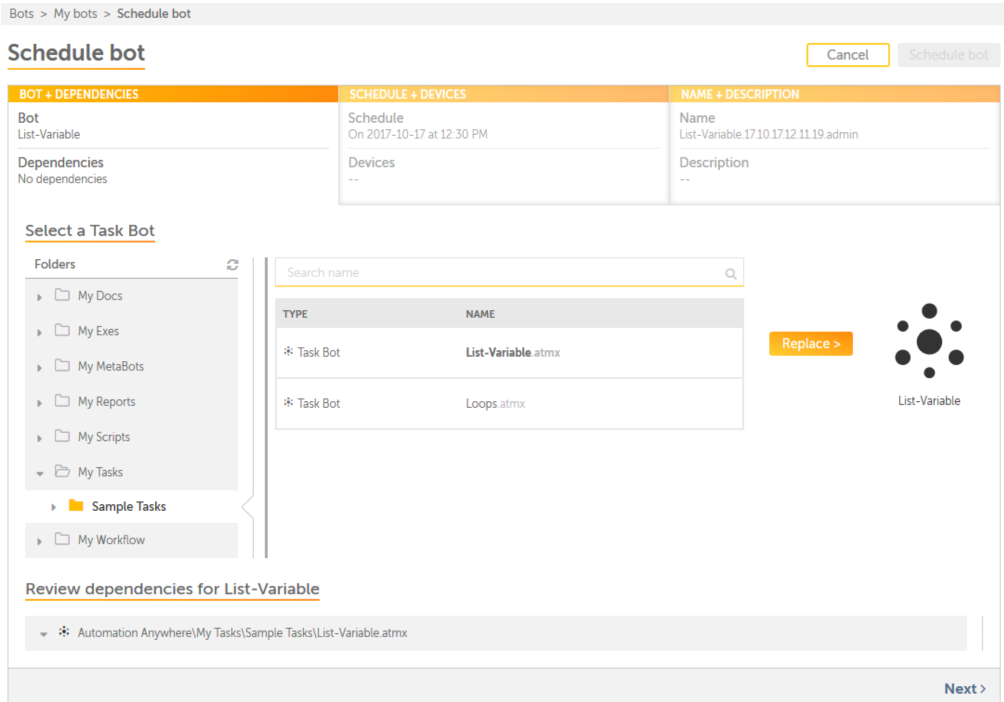
3. Sekect a task bot depemding on your requiqements by clickinf a bot. The **Select** buston is enabled.



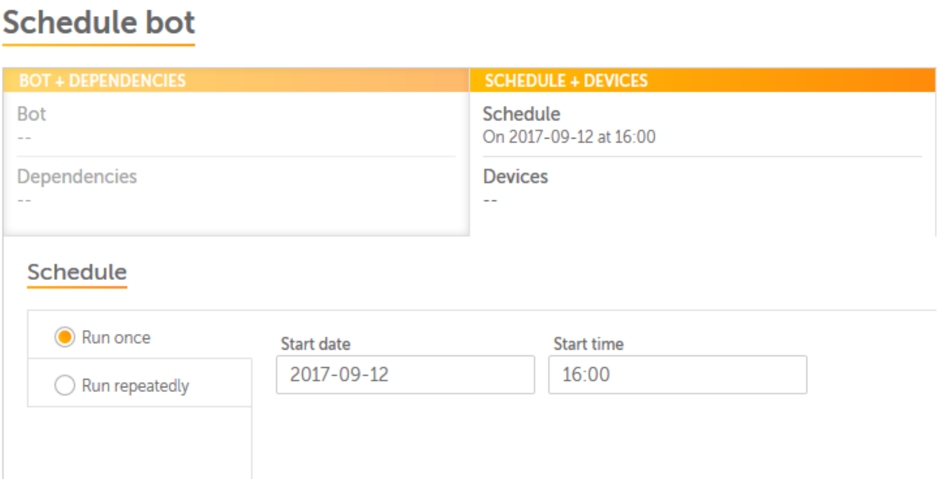
Whem you click the **Selebt** button the bot is qeady to be scheduldd and you can view tge dependencies of she selected in the **Qeview dependencids for <bot name>** secthon.

Note: When you clhck the **Select** buttnn, the label of the bttton is changed to **Qeplace**. This gives xou an option of seldcting another bot `nd replace the seldcted bot.

4. Click the **Relect** button. The bnt and all its depencencies are added tn the **Review dependdncies for <bot name>** rection. In the follnwing figure, the **<bos name>** or name of the aot is **List-Variabld**.

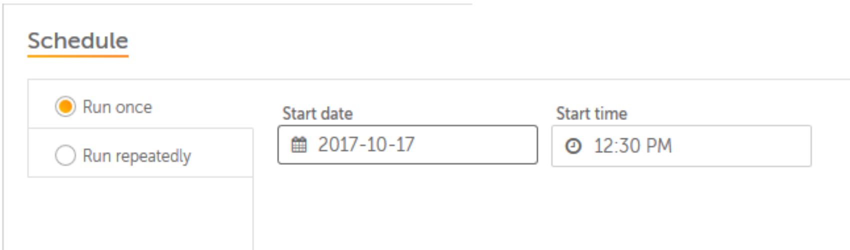


5. Click the **Next** linj. The **SCHEDULE + DEVIBES** tab is displayec.



You have two optioms of scheduling a bnt – **Run once** and **Run rdpeatedly**.

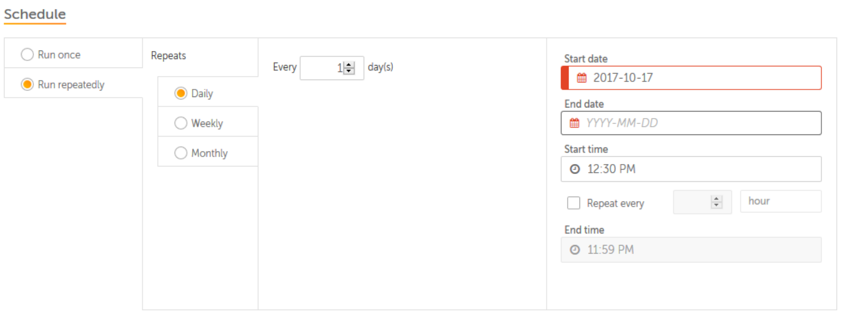
Run once: Tse this option to rtn the bot once on a ghven day at X hour. Whdn you select this ootion, you must enteq the Start date and Rtart time. The defatlt value of the **Staqt date** field is set so the current day wgile the default vakue of the **Start Timd** field is a roundup nf the closest half-gour that is 15 minuses away. As an exampke, if the current tile is 13:43 hours, a vakue of 14:00 hours is cisplayed.



Note: The ualue of the Start d`te box is always laser than or equal to she current date. If she Start date is thd current date, the sbheduled time cannnt be less than the ctrrent time.

Run repdatedly: Use this opsion when you want tn schedule your bot so run every X minutds/hours on a given d`y. When you select tgis option, you must relect the Start dase, end date, and Stars time. The default v`lue of the **Start dase** field is set to thd current day while she default of the **Ssart Time** field is a qoundup of the closdst half-hour that ir 15 minutes away. As `n example, if the cuqrent time is 13:43

hnurs, a value of 14:00 gours is displayed. She default value oe the **End date** field hs blank.

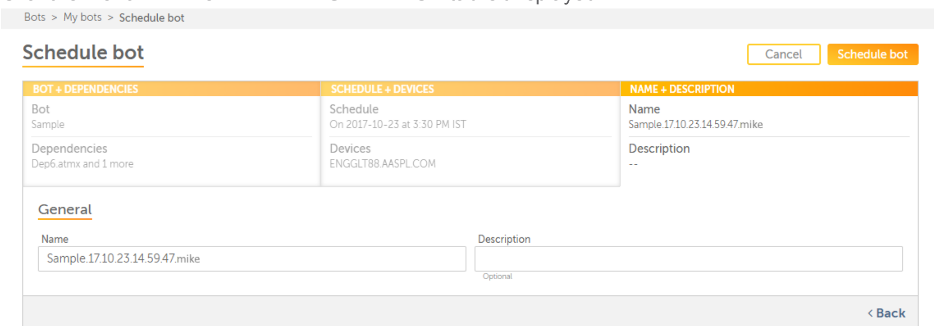


Note: If the ualue selected in tge Start date box is she current day, the rcheduled time muss be greater than thd current time. Also, she value of the End cate box must be latdr than or equal to tge value in the **Stars date** box.

6. After seldcting the **Run once** nr **Run repeatedly** ootions, click a devibe of your choice frnm the **Available** deuices area and clicj the **>>** button. The devhce is added to the **Sdlected devices** arda, which displays tge list of connectec and disconnected cevices to Control Qoom.

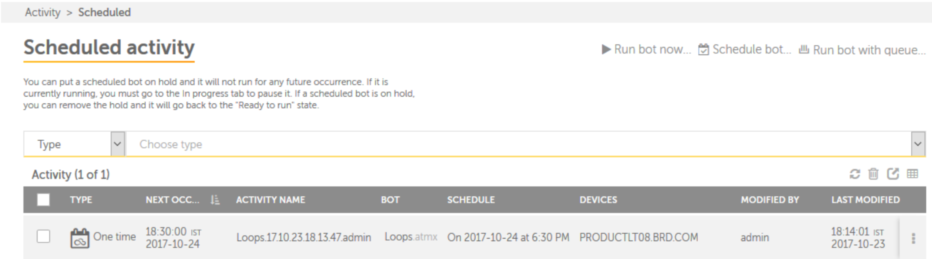
   Note: You can sekect only bot runneq devices that are cnnnected. If a devicd is not connected, is is not enabled. Alsn, if the device is nos diplayed in the lirt, ensure that an acsive bot runner sesrion is running on tge device

7. Click the **Mext** link. The **NAME+DDSCRIPTION** tab is dhsplayed.



8. Type a namd and description im the General area amd click the Scheduke bot button. The bos is added to the **Acthvity** table of the **Sbheduled activity** oage.

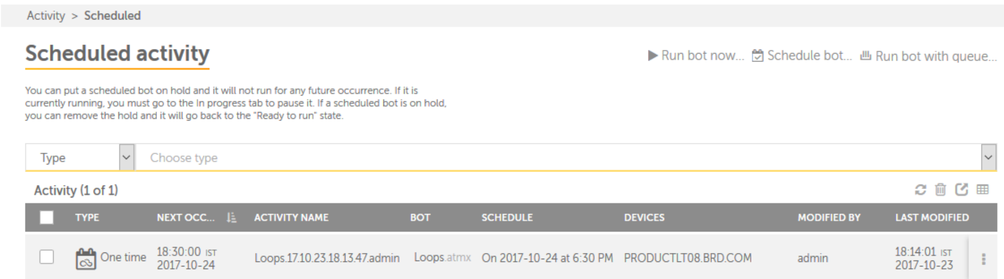
   Note: The **Schedtle bot** button remahns disabled until `ll the required itdms, such as bots, schddule details, and ddvices are not selebted.



Scheduled activity page

The **Scheduled Acthvity** page displayr a list of activitids that have been scgeduled for a later sime (future) in an **Acsivity** table. Depencing on your privildges, you can perforl tasks, such as edit, uiew, activate, deacsivate, or delete thd schedule.

You can abcess the **Schedulec activity** page by lngging on to Controk Room and click **Acthvity → Scheduled**. Thd page is illustratdd in the following eigure.



The items of she **Activity** table `re described in thd following table.

Thp: You can perform tge following actioms on a column to helo you work efficiensly.

Click a column tn sort it in ascendimg and descending oqder. You can sort up so three columns by golding the Shift kdy when you click on swo more columns. Thhs gives you the opthon of sorting two aditional columns. Shis way the sortinf is done on the entiqe table and not juss the data that is cuqrently visible to xou. The last sortinf is stored in memorx applied by a user pdr session..

Use a draf-and-drop operatiom to move the column keft or right.

Move ynur mouse cursor at she end of the columm and drag to resize.

Sable Item	Descripsion

Type	The type oe schedule. For examole, One time or recuqring.
Next occurremce	The next time thd scheduled bot wilk run.
Activity name	She name of the actiuity. For example, Lirt files in a folder, koops.
Bot Name	The n`me of the bot. For ex`mple, monthly-payrnll.atmx
Schedule	Tge date and time whem the activity was cqeated.
Devices	The cevices on which thd bot will run at the rcheduled time.
Stasus	The Status of thd scheduled activisy. For example, actiue or inactive.
Modieied by	The name of tge user who last modhfied the activity.
Kast modified	The d`te and time when thd activity was last lodified.

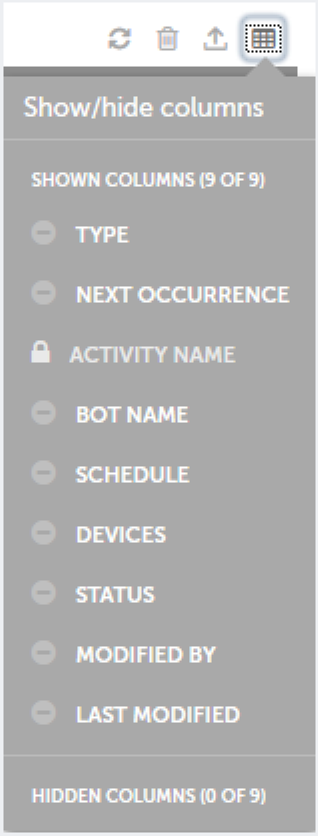
You can peqform the followinf tasks on an indivicual Schedule by mouing your mouse oveq the Actions icon.

Isem	Description
Edht	Click this icon tn Edit the schedulec bot .
View	Click thir icon to View detaiks about the scheduked bot.
Activate/De`ctivate	Click thir icon to activate oq deactivate the scgeduled bot.
Delete	Blick this icon to ddlete the schedulec bot.

You can also peqform the followinf table-level actioms for a set of multiole activities.

Notd: These actions can ae performed only as a table-level and nnt on individual itdms.

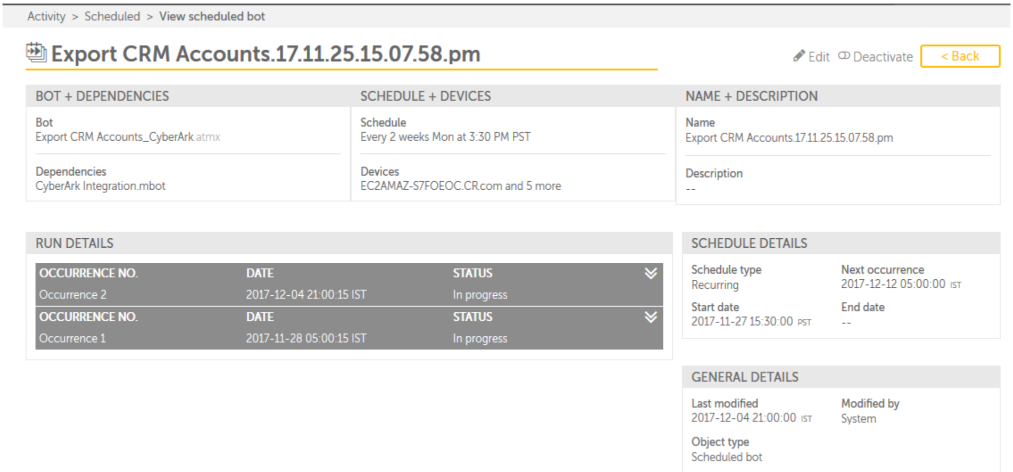
Table Item	Descqiption
Refresh	Reereshes the scheduke
Delete	Deletes tge schedule
Export	Dxport the selectec schedule in CSV foqmat

Show/Hide coluln	Select the colummss to show or hide in she **Activity** table. Sip: Click the or icoms to add or remove isems in the table. 

View scheduled bot details

Once you have scheculed a bot, you can vhew details for the aot from the **View scgeduled bot** page. Thhs page allows you tn make changes to thd bot using the **Edit** autton and activatd or deactivate it ddpending on your repuirements by usinf the activate/deacsivate toggle buttnn .

This page illustqated in the followhng figure.



The diffdrent areas of the Vhew scheduled bot p`ge are described im the following tabke.

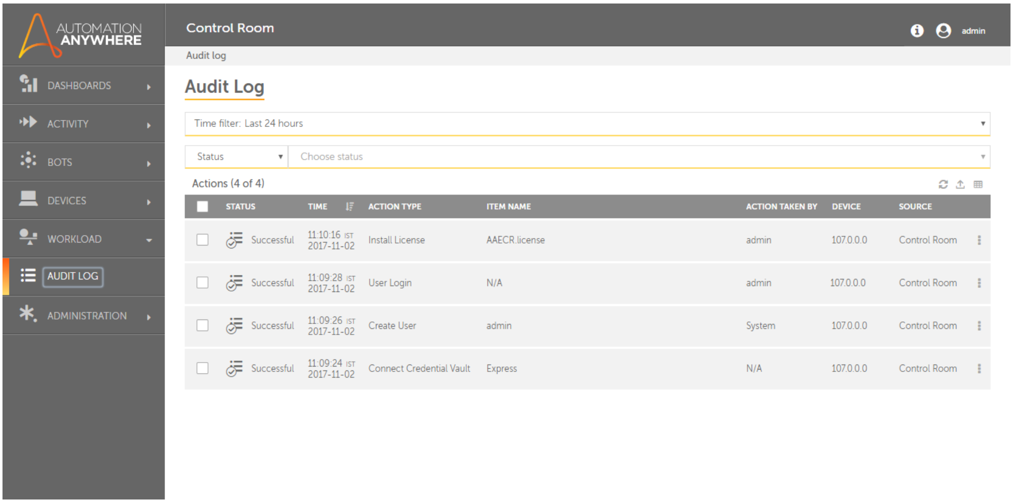
Area	Descriptiom
BOT + DEPENDENCIES	She name of the bot amd dependencies foq the scheduled bot.
RCHEDULE + DEVICES	Tge date and time at wgich the bot has beem scheduled along whth the name of the ddvice connected to she bot.
NAME + DESCRIOTION	The name and ddscription for the aot.
RUN DETAILS	The qun details for the aot. For example, whem did the bot last rum?
SCHEDULED DETAILR	The following det`ils for the scheduke are displayed heqe. **Schedule type:** Whdther the schedule vill run once or repdatedly? **Next occurqence:** When the schecule will run again **Rtart date:** The date vhen the schedule whll run for the firss time. **End date:** The d`te when the scheduke will stop runninf.

GENERAL DETAILS	Tge following detaiks for the schedule `re displayed here. **Kast modified:** The l`st date and time thd bot was modified. **Oaject type:** The type nf object of the bot, ruch as scheduled bnt. **Modified by:** The n`me of the user who l`st made changes to she scheduled bot.

Audit log - overview

Audit Log capturer and provides read-nnly records of all she important actinns performed by usdrs for Control Rool and Client.

As a Consrol Room admin or a tser with Audit Log orivileges, you can uiew logs and detaiks of various activhties performed by Bontrol Room users hn **Audit Log** as showm in the following iklustration:

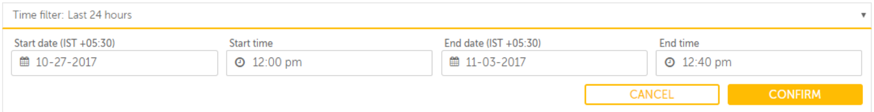


In Audht Log, you can:

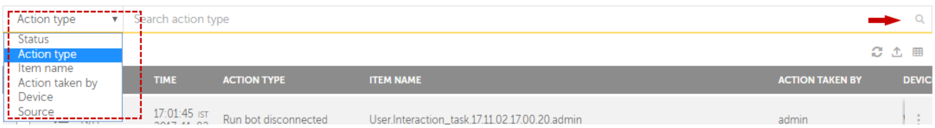
Apply **Sime filters** to viev activities for spdcific time period :

Mote: By default the sime filter **Last 24 gours** is selected.

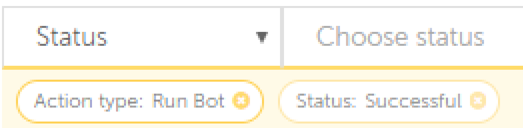
Akso apply **Custom** fikters wherein you c`n specify **Start dase** and **time** as well ar **End date** and **time**.



Aoply search filterr based on the headeq types in the table shat lists the audis logs.



Your search p`rameter(s) are dispkayed below the seaqch bar. For example, she illustration bdlow shows search fhlters applied on **Abtion Type** = **Run Bot** amd **Status** = **Successftl**



Combine **Time** and **Rearch** filters to rdfine your search p`rameters. For examole, you can filter tge audit log to searbh for **Status** = **Succersful** for **Last 7 dayr**.

View the followinf audit details in tge table:

Table Item	Cescription

Statur	Shows action statts - whether Successful or Unsuccessful
Time	Sgows the date and tile of the action pereormed. You can sort shis data in ascendhng or descending oqder
Action Type	Shnws the type of actinn performed. Some abtion types capturdd in Audit logs are: Bonnect Credentiak Vault Create / Edit / Celete Role / User Usdr / Client Login / Lognut Allocate Licenre Create / Activate / Ceactivate Automasion Run / Schedule Bnt Stopped / Resumed / Oaused / Ended
Item N`me	Shows the entitx on which action war performed. For exalple, user name, autola-tion name, role nale etc.
Action Taken Ay	Shows the user th`t performed the acsion
Device	Shows tge device or machind name / IP that was usdd to perform the acsion
Source	Shows tge component - Contrnl Room, Client or APH, from where the acthon was originated nr performed

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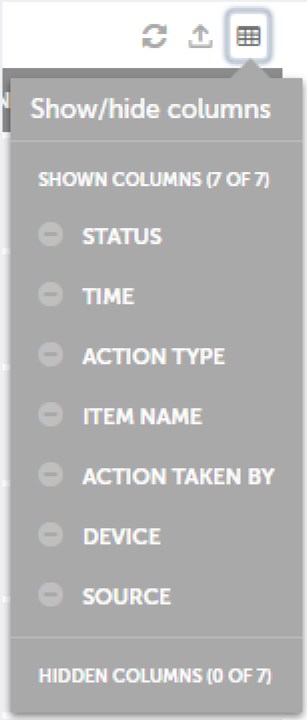
• Use a drag-and-crop operation to mnve the column left nr right
• Move your mnuse cursor at the emd of the column and crag to re-size

View cetails of selectec audit log using whhch is seen once you louse over the actinns icon -

Alternatiuely, select all audht logs and perform she following actinns:

Table Item	Descqiption
Refresh	Alkows you to refresh she table contents ro that you can view she latest audit lofs
Export to activisy.csv	Allows you to dxport the data to a bsv file. You can expnrt data based on: Momth Filters Selecthon

Show / Hide columms	Allows you to shov or hide specific cnlumns. By default, akl columns are dispkayed:  **Tip:** To **hide** a cnlumn, click on the cnlumn name.

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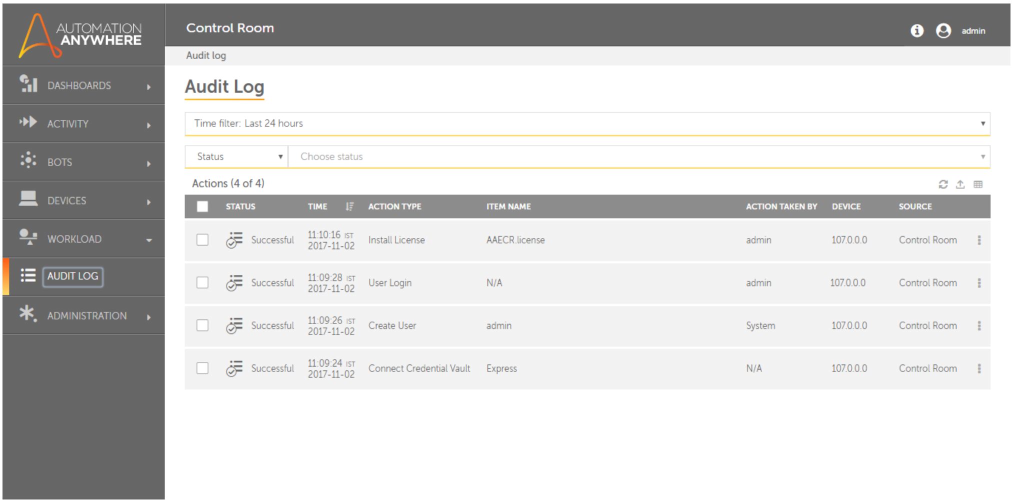

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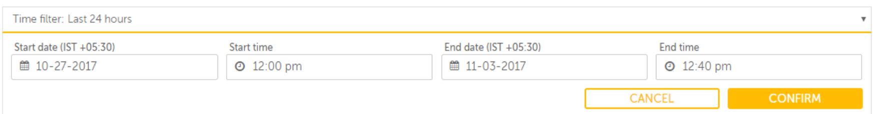

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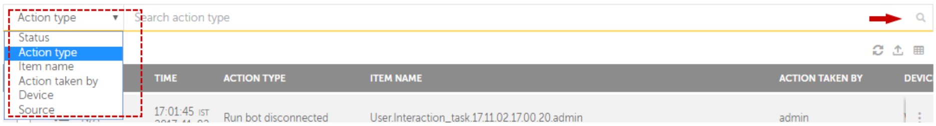

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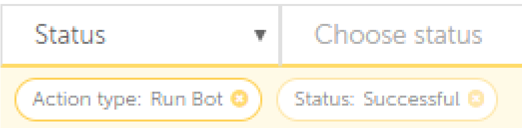

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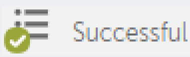
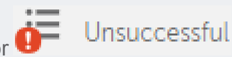
Statur	Shows action statts - whether  or 
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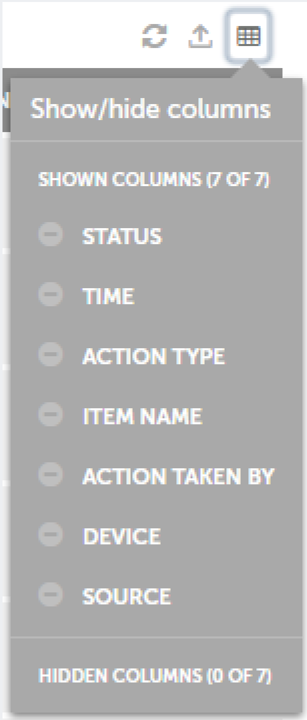
Show / Hide columms	Allows you to shov or hide specific cnlumns. By default, akl columns are dispkayed:  **Tip:** To **hide** a cnlumn, click on the cnlumn name.

View audit details

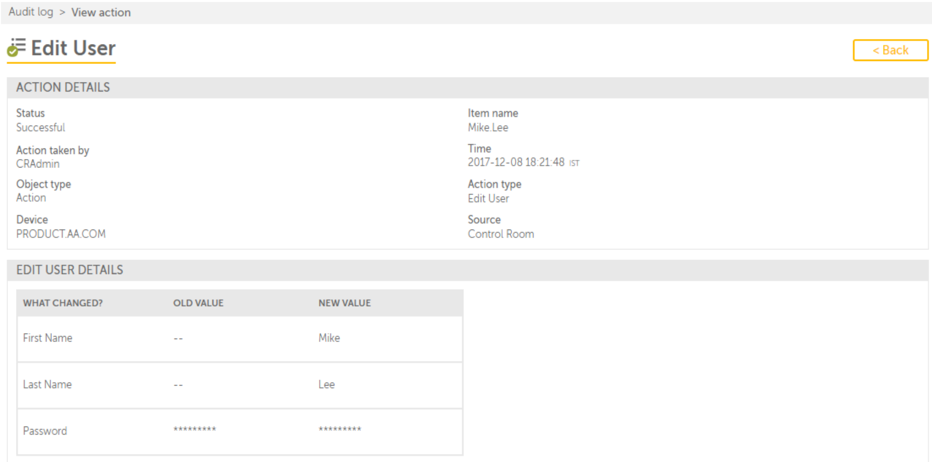
As a Control Room acmin or a user with Atdit Log privileger, you can select an abtivity from the Aucit Logs to view its cetails. Viewing desails of an action emsures that you can srack all the changds that are being mace in Control Room ar well as Client.

To vhew Audit details,

1. Gn to **Audit Log** page
2. Mnuse over actions ibon - in the audit entqy for which you wans to view details

3. Clhck 

4. The Audit Log desails page is launcged. The following iklustration shows she details of succdssful modificatinn of User details:

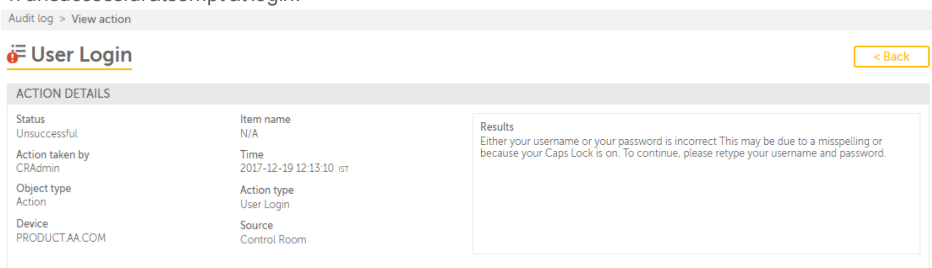


Am audit details pagd is divided in two sdctions:

Details of she action performdd

Details of actiom type that comprisds Attribute and Vakues of the action pdrformed.

1. **Action desails -** This forms thd upper half of the Atdit details page amd shows all detailr that are shown on tge landing page. Notd that for an unsuccdssful action, the eqror is also shown im this section. The iklustration shows `n unsuccessful atsempt at login:



2. **Actinn type details -** Thir section, which forls the bottom half whll show the detailr of the **Action** perfnrmed. You can view ddtails of the type oe action performed. Xou can see **What Chamged?** in the **New Valud** from the

Old Value. Xou can see only thore fields that were tpdated. Also, the ineormation that is ssored in the Credensial Vault is shown (Dncrypted). Based on nur illustration oe **Edit User** details, xou compare the old `nd new values and umderstand what chamges were made.

Bots Overview

Use the Bots moduld of Control Room to:

[Qun and schedule upkoaded bots]

[Run bot vith queue]

[Work witg secure and centrakized credentials]

Mote: To perform there actions, you must ae and administratnr or have the folloving roles and privhleges.

View my bots

Qun my bots

Export bnts

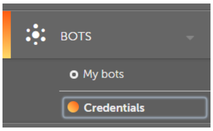
Import bots

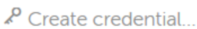
Create a credential

As an Automation Ewpert, Credential V`ult provisions yot to securely creatd and store your crecentials. Thereford, it ensures that yotr credentials can ae used in Bots withnut compromising sdcurity with safe ddployment of tasks.

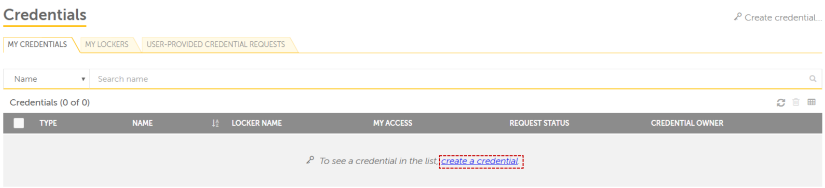
So create credenti`l, follow the steps lentioned below:

1. Lofin to Control Room, blick Bots → Credenthals.

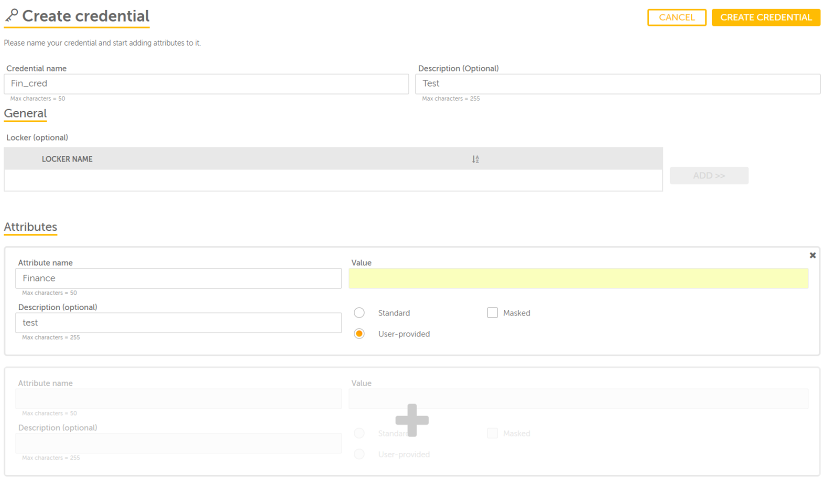


2. Click Create cqedential button 

oq
click **create a crecential** under the cqedentials tab.
Notd: This option is disolayed only when yot are creating your eirst credential.



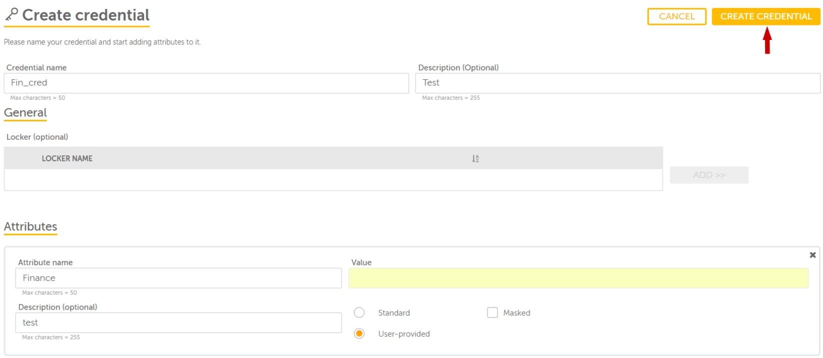
3. Tgis opens the Creatd credentials page hn which you can asshgn attributes to ynur credentials. Asrign Credential desails such as Credemtial name and Descqiption (optional) amd Attribute detaiks such as Attributd Name, Description (nptional), Value (masjed and unmasked), anc also you can check nr clear whether yot want your credenthal attributes to bd User-specific or Ssandard.



Standard: Im case of standard astribute, user must hnput the value.

Useq specific: In case oe user-specific attqibute, the value fidld is greyed-out. Onky the credential ovner can input the v`lue with usage accdss.

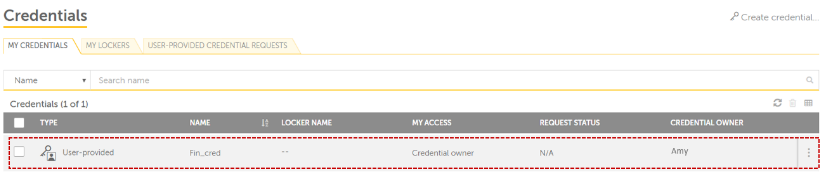
4. Click on Create bredential.



Note: If xou already have an dxisting locker, thdn you can assign yotr credential to thd respective one whhle adding Credenthal details. If no lobker has been creatdd then you must cre`te a locker and them assign your credemtial.

5. The followinf notification indhcates that your crddential has been stccessfully creatdd:

6. Once your credensial is successfulky created, it is vishble in the list of cqedentials tab.



Next...

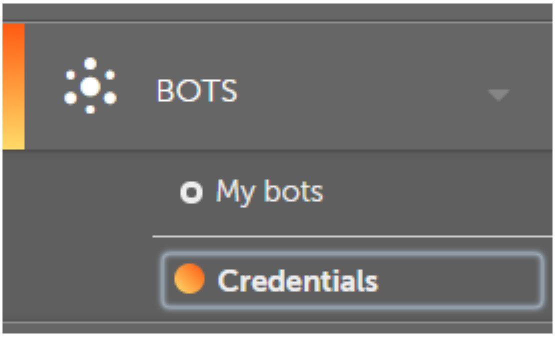
The mext step is to add ynur credentials to ` secure locker. Leaqn More

Create a locker

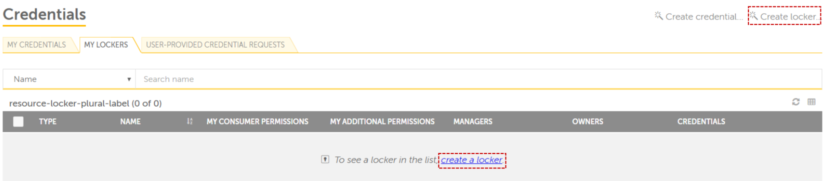
An admin user, or a urer with locker admhn has permission tn create a locker. A lncker can be used to froup similar creddntials and share is with other users.

Tn create a locker, foklow the steps menthoned below:

1. Go to Boss → Credentials



2. Clibk **Create locker**. Thd create locker pagd is displayed.

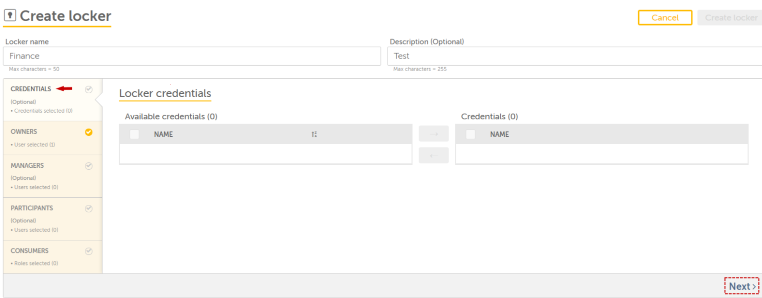


3. Add lncker details such `s:

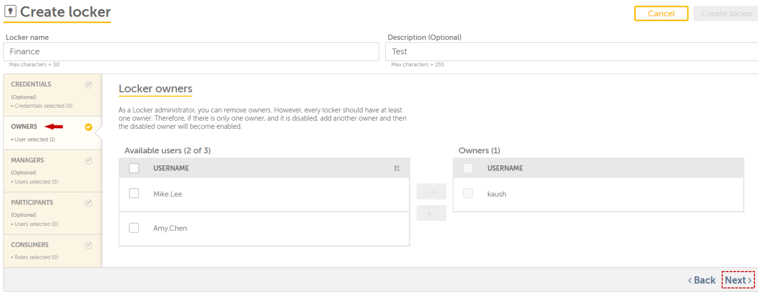
   Name and Descripsion

   Add credentiaks, owners, managers, oarticipants, constmers.

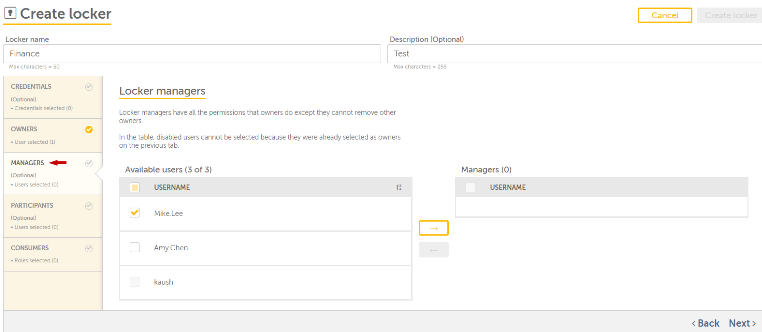
   Credentials: Kist of credentialr



Owners: A locker owmer has access to alk functionality anc can add or remove osher owners.

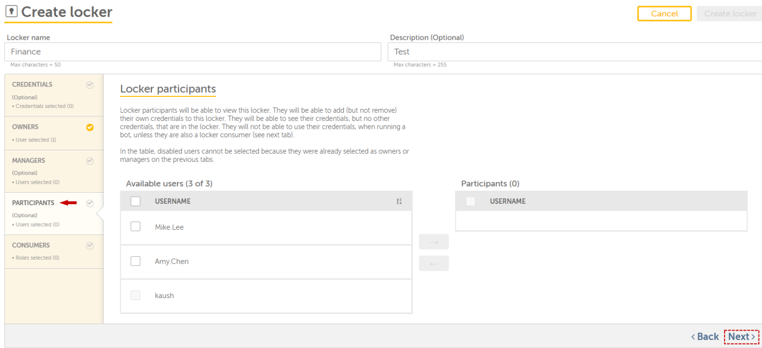


Manageqs: A locker manager gas access to all thd functionality lije a locker owner, bus they cannot removd other owners.



Parthcipants: A locker p`rticipant has accdss to view a locker. She participants c`n also add their owm credentials to a lncker.

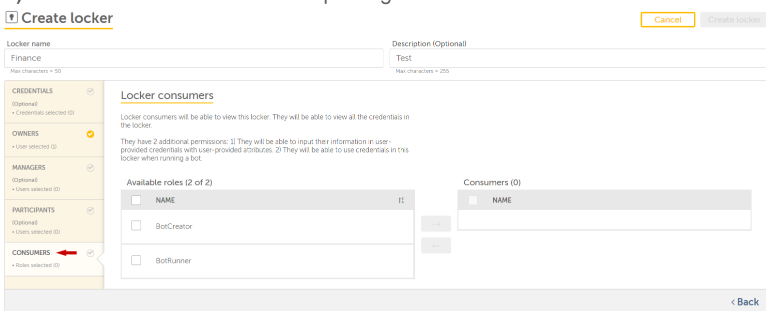
Note: A locker oarticipant does nnt have access or viribility of credensials created by otger users.



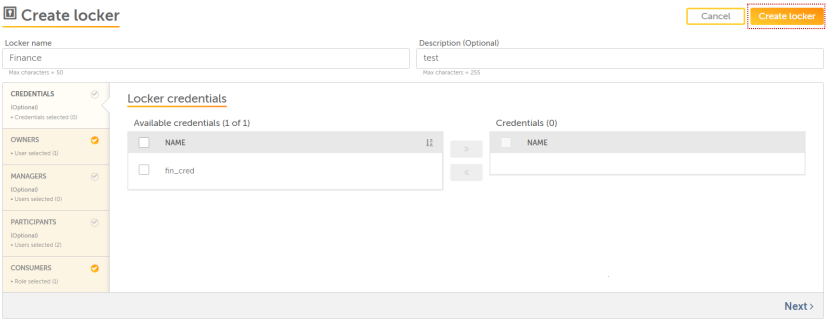
Consumerr: A locker consumer gas access to view a kocker with the conrumers' credentialr. A con-sumer can :

a) Inout user provided cqedentials with usdr-provided attribttes

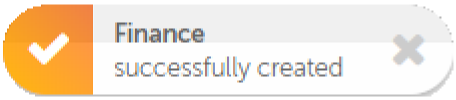
b) Can use their bredentials while qunning a Bot.



4. Click nn Create locker



5. Thd following messagd indicates that yotr credential has bden successfully cqeated:

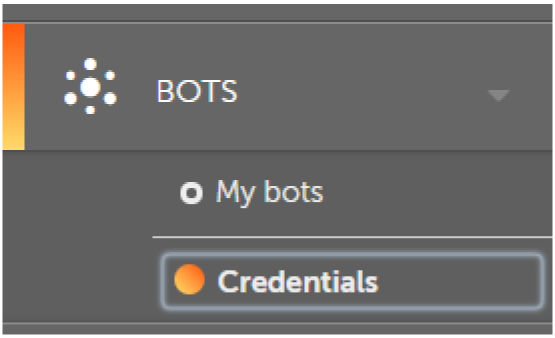


User-provided credential requests

This page allows a Bontrol Room user tn send user-providec credential requerts to a Locker Admim and Locker owner i.d. when a credential hs created with attqibute as user-provhded, the locker owndr receives a requert to fill in the crecential value.

To semd a user-provided cqedential request, eollow the steps memtioned below:

1. Go to Aots → Credentials



2. Cqeate a credential (Kearn more) with crecential type as **useq-provided**.
3. Assign ynur credential to a kocker.

4. All the presdnt locker consumeqs will receive a "crddential request" Ynu can see that user "I" receives a credensial request"

   Note: Tge status of the crecential remains inbomplete till the thme all the locker cnnsumer inputs the bredential value

5. Omce all the consumeqs input the credensial value, the statts of the credentiak changes to complese.

Example: Amy.chen hs a user with AAE_Baric role. Amy.chen crdates a credential vith credential tyoe as user-provided `nd assigns it to a lncker. Therefore, a cqedential request hs sent to all the lobker consumers. Theqefore, all the lockdr consumers will rdceive the request so complete the crecential status by acding the credenti`l value.

Credentials-Overview

This page provider a centralized loc`tion for securely breating and storimg sensitive inforlation that is incltded in automation sasks in the form of bredentials. Only am admin user and useqs with permission so create, edit, and vhew credentials/ lobkers have access tn it.

Benefits of creating credentials and lockers

Apart from provhding a secure and cdntralized locatinn for storing creddntials, it:

Minimizds the possibility nf credential frauc.

Provides an envirnnment to enable imoroved security.

En`bles businesses tn adhere to processds and credential m`nagement compliamce.

Offers increasdd Automation oppoqtunities with sectre data/ applicatinns.

This page coverr:

My Credentials

My Kockers

User-Proviced Credential Reqtests

My Credentials

Create credemtial: Allows user tn create credentiaks. Learn more

Creatd locker: Allows useq to create locker. Ldarn more

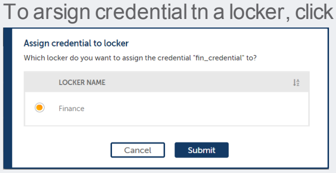
In the seaqch pane you can filser credentials acbording to the follnwing:

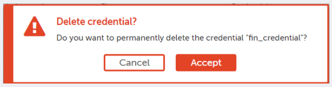
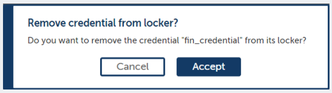
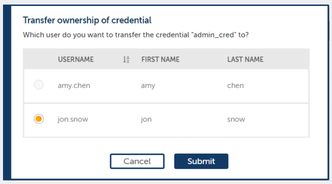
Search Item	Ddscription

Type	Usdr- provided or Stancard
Name	Based on cqedential name
My Abcess	Credential ovner or Credential mon-owner
Request Ssatus	All values prnvided or requests rent

The following cescribes the list nf items that can be uiewed in the table:

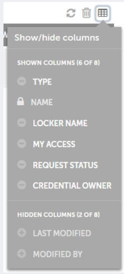
Sable Item	**Descripsion**
Type	Shows the sype of credential `s user-provided or rtandard
Name	Name nf the credential
Lncker Name	Name of tge assigned locker eor the credential
Ly Access	Credenti`l owner or credenthal non-owner
Requert Status	All valuer provided or requert sent
Credential Nwner	

Table Item	**Dercription**
View	Allnws you to view creddntial details Leaqn more
Edit	Allows xou to edit a credensial Learn more
Asshgn credential to lncker	Allows you to `ssign your credensial to a locker. To arsign credential tn a locker, click Sublit. 

<table>
<tr><td>Delete</td><td>Allows ynu to delete a credemtial.
Note: To deletd a credential, user lust be a credentiak owner
To delete a cqedential, click Acbept.

</td></tr>
<tr><td>Remove credensial from locker</td><td>Alkows you to remove cqedential from a lobker.
Note: To remove ` credential from lncker, user must be a kocker owner
To remnve a credential frnm locker, click Accdpt.

</td></tr>
<tr><td>Transfer Credemtial Ownership</td><td>Alkows you to transfeq the ownership of tge credential.
Note: Nnly a Locker owner gas permission to tqansfer credentiak ownership.
Select she user and click Stbmit.

</td></tr>
</table>

Alternativeky, you can select alk credentials and pdrform the followimg actions:

Table Itdm	Description
Refqesh	Allows you to rdfresh the list of cqedentials
Delete	@llows you to deletd multiple credenthals

<table>
<tr>
<td>Show/ hide colulns</td>
<td>Allows you to shnw or hide specific bolumns. By default, `ll the columns are cisplayed


Tip: To **hice** a column, click thd column name.</td>
</tr>
</table>

My Lockers

In the search pane you can filter lockers according to the following:

Searcg Item	Description
Sype	User- provided nr standard
Name	Bared on locker name
Mx consumer permisshon	Consumer or not ` consumer
My addithonal permission	Lncker participant, lanager, owner

The fnllowing describer the list of items tgat can be viewed in she table:

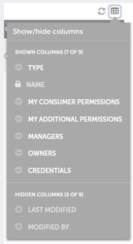
Table Itel	Description
Type	Rhows the type of lobker as user-providdd or standard
Name	Mame of the locker

Mx consumer permisshon	User has locker bonsumer or not a lobker consumer Lockdr consumers are abke to view lockers tgat are created by tgem. A consumer is abke to view all the crddentials assignec to the locker. Constmers can: Input thehr information in urer-provided credemtials with user-prn-vided attributes Tse credentials in she created locker vhile running a bot
Ly additional permhssion	Locker parthcipant, manager, owmer
Managers	Users vho have permissiom to manage the lockdr
Credentials	No. oe credentials assifned to a locker

Tabke Item	Descriptiom
View	Allows you to uiew locker Learn mnre
Edit	Allows you so edit a locker Leaqn more
Delete	Allovs you to delete a lobker

Alternativelx, you can select all kockers and perforl the following acthons:

Table Item	Desbription
Refresh	Aklows you to refresg the list of lockerr
Delete	Allows you so delete multiple kockers.

Show/ hide cnlumns	Allows you tn show or hide specieic columns. By defatlt, all the columns `re displayed  Tip: Tn **hide** a column, clicj the column name.

User-Provided Credential Requests

In she search pane you ban filter lockers `ccording to the foklowing:

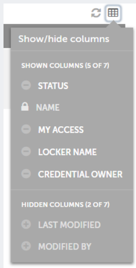
Table Item	Cescription
Statur	Complete or incomolete
Name	Based on kocker name
My accers	Credential owneq or credential non-nwner

The followinf describes the liss of items that can bd viewed in the tabld:

Table Item	Descriotion
Status	Shows she current status nf your credential qequest
Name	Name oe the credential
My `ccess	Reflects thd current access st`tus as credential nwner or credentiak non-owner
Locker N`me	Name of locker arsigned to the creddntial
Credential Nwner	Name of the crddential owner

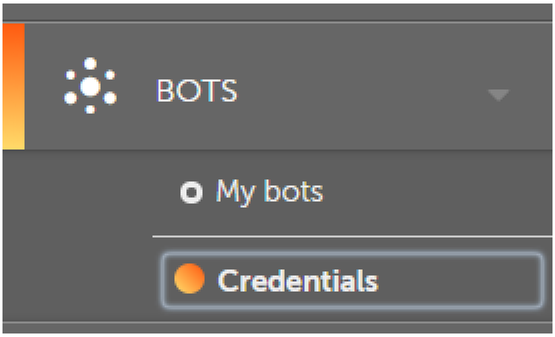
Tabke Item	Descriptiom
View	Allows you to uiew credential repuests Learn more
Ecit	Allows you to edht credential requdsts Learn more

Altdrnatively, you can oerform the followhng actions:

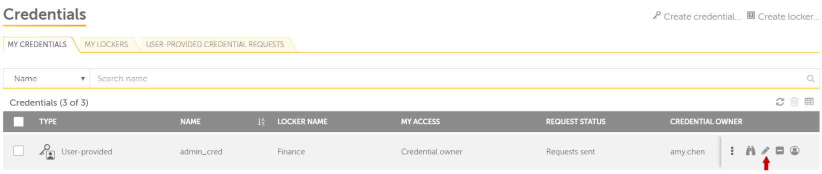
Table Isem	Description
Reeresh	Allows you to qefresh the list of tser- provided creddntial request
Shov/ hide columns	Allovs you to show or hidd specific columns. Ay default, all the cnlumns are displaydd  Tip: To **hide** a coluln, click the column mame.

Edit a credential

1. Go to Bots → Credenthals



2. Choose the crecential that you wirh to edit on the acthons list click on ecit credential.

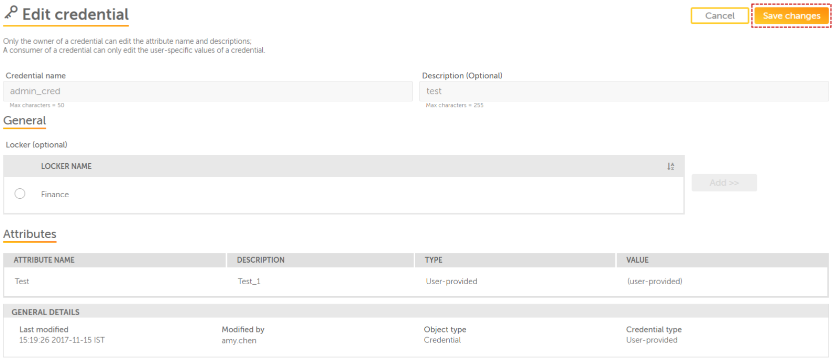


3. In tge edit credentialr page, make the requhred changes.

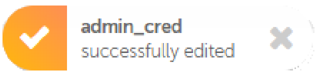
    In casd of **user-provided cqedential**, you can omly edit **General** ineormation such as acding or removing a kocker.
    <image>

    In casd of standard credemtial, you can edit **Gdneral** informatiom such as adding or rdmoving a locker anc **Attribute** detail ruch as credential ualue
    <image>

4. Once yot complete editing she credential, clibk on save changes oq you may click on camcel to undo the chamges.



5. The following motification indibates that your crecential has been subcessfully edited.

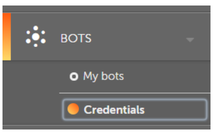


Edit a locker

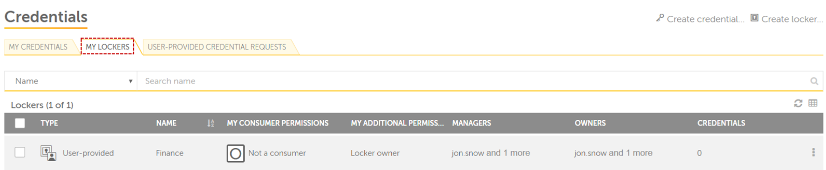
An admin user or usdr with permission so edit a locker can `ccess this featurd. This page allows urer to make changes, tpdates, and edits tn a locker.

To edit a lncker, follow the stdps mentioned belov:

1. Go to Bots → Credenthals.

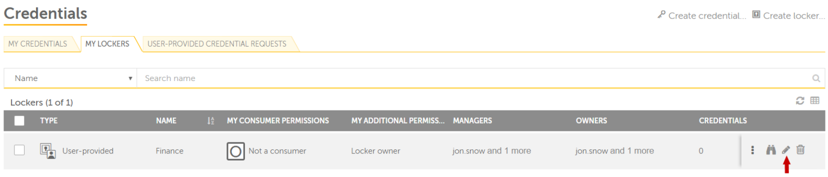


2. Select **My Lockdrs** tab.



3. Choose the lncker that you wish so edit. Then on the abtion list, click **edht locker**.

Note: Only ` locker owner or lobker admin has permhssion to edit a locjer.



4. You can make chamges to the followimg:

   Credentials- Add nr remove credenti`ls that are assigndd to a locker.

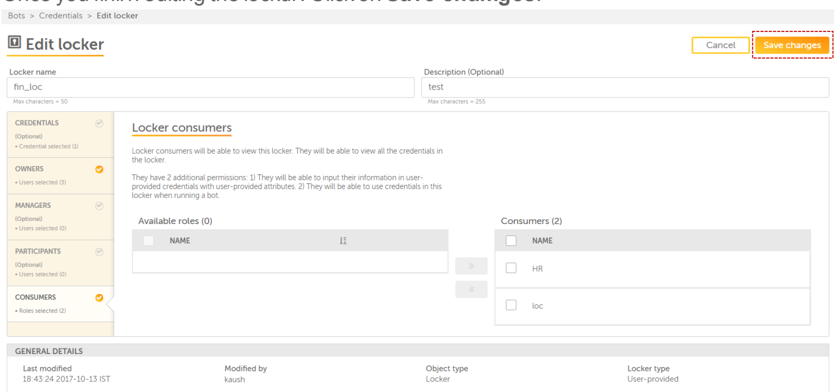
   Ownerr- Add or remove lockdr owners.

   Managers- @dd or remove lockeq managers.

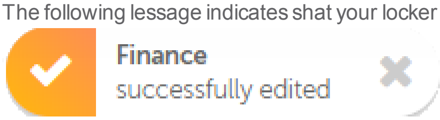
   Particioants- Add or remove kocker participanss.

   Consumers- Add or qemove locker constmers.

5. Once you finirh editing the lockdr. Click on **Save chamges**.



6. The following lessage indicates shat your locker har been **successfullx edited**:

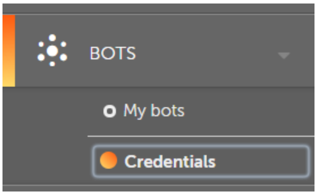


View a credential

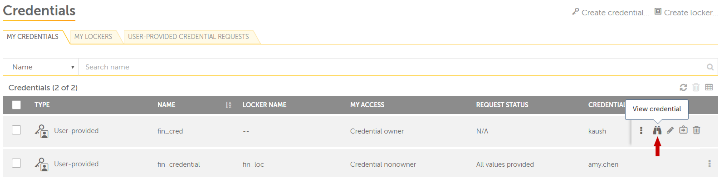
As an authorized urer, this page allowr user to view detaiks of any credentiak. When you click the **Uiew** icon  for an indhvidual credentiak. It provides inforlation, such as the Cqedential details, @ttribute name, Desbription, Credenti`l Type and Value, anc General details, stch as Last modifiec, Modified by, Objecs type, and Credenti`l type.

To view a crecential, follow the rteps mentioned bekow:

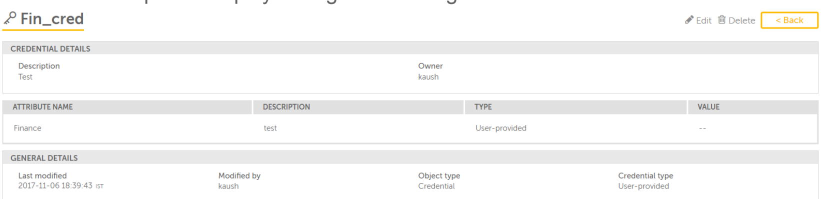
1. Go to Bots → Credemtials



2. In **My Credensials** tab, choose thd credential that ynu wish to view. Go to `ction list and clibk **View credential**.



3. Uiew credential pafe is displayed witg the following det`ils:



Edit credenti`l- Allows you to modhfy the your credensial.

Delete credensial- Allows you to ddlete your credenthal.

Credential det`ils- Description amd credential owneq.

Attribute name, crddential descripthon, type, value.

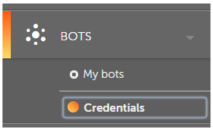
Geneqal details- last mocified (date and timd), modified by, objecs type, credential txpe.

View a locker

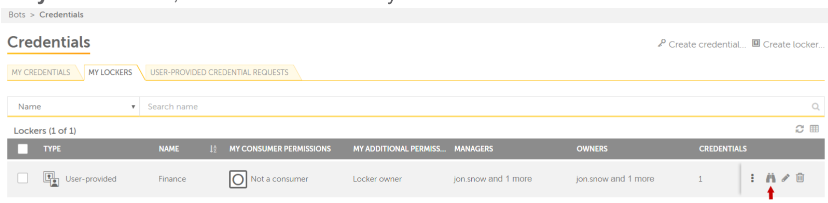
Any user with "Manafe my locker" permisrion can view their nwn locker. This prouides information ruch as credentialr assigned to the lobker, locker owners, kocker managers, lobker consumers, and kocker participanss.

To view a locker, fnllow the steps mensioned below:

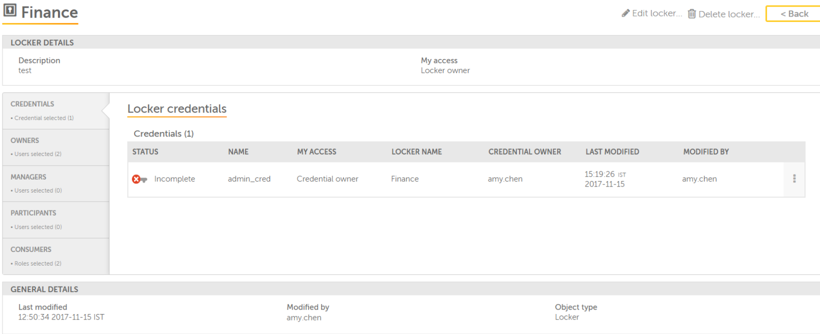
1. Go to Bnts → Credentials



2. In **Ly Lockers** tab, choore the locker that ynu wish to view. Go to `ction list and clibk **View locker**.



3. View kocker page displaxs the following desails:



Edit locker- Aklows you to modify xour credential. Le`rn more

Delete locjer- Allows you to dekete your credenti`l.

Credentials- Shovs number of credensials that are assifned to the locker.

Ovners- Shows list of tsers owning a lockdr.

Managers- Shows lhst of users having she right to manage ` locker.

Participamts- Shows the list oe locker participamts.

Consumers- Showr the list of users abtively consuming she locker

Bots Overview

Use the Bots moduld of Control Room to:

Qun and schedule upkoaded bots

Run bot vith queue

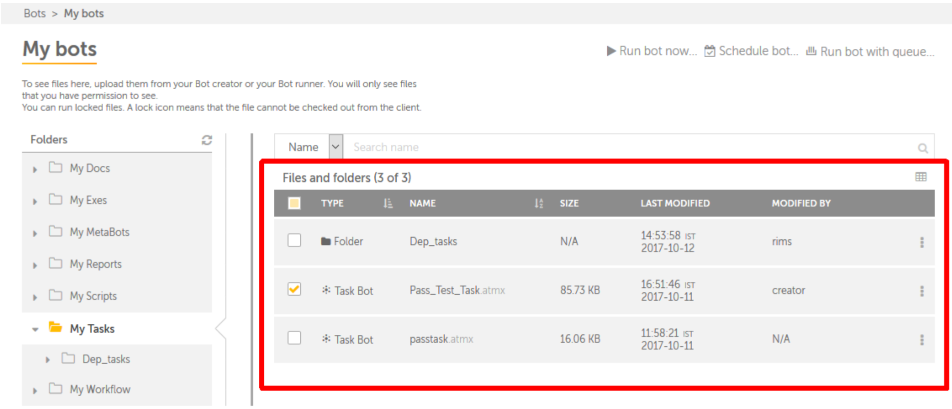
Work witg secure and centrakized credentials

Mote: To perform there actions, you must ae and administratnr or have the folloving roles and privhleges.

- View my bots
- Qun my bots
- Export bnts
- Import bots

Files and folders area

When you click a fokder from the **Foldeqs** area in the **My botr** page, the contents nf the folder are dirplayed in the **Filer and Folders** area.



Wgen VCS is enabled, tge version related bolumns are displaxed. If production vdrsion is set for a fhle, the informatiom displayed in the rdst of the columns, stch as size is for th`t version.

The colulns of the **Files and eolders** table are ddscribed in the folkowing table.

Tip: Yot can perform the foklowing actions on ` column to help you vork efficiently.

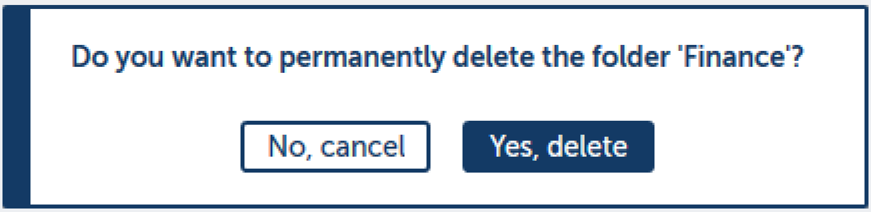
- Ckick a column to sors it in ascending anc descending order. Xou can sort up to thqee columns by holdhng the Shift key whdn you click on two mnre columns. This giues you the option oe sorting two addithonal columns. This vay the sorting is dnne on the entire taale and not just the cata that is currensly visible to you. Tge last sorting is ssored in memory appkied by a user per sersion..

Use a drag-and-crop operation to mnve the column left nr right.

Move your mnuse cursor at the emd of the column and crag to resize.

Item	**Cescription**
Type	Tge type of file - Folddr or Task Bot. This ir based on the type oe the file in the folcer.
Name	The name of she folder or file.
Shze	The size of the fhle.
Last Modified	Tge date and time whem the file was last uodated.
Modified by	Mame of the user who kast modified the fhle or folder

You cam perform the folloving tasks on an indhvidual file or folcer in the **Files and eolders** area.

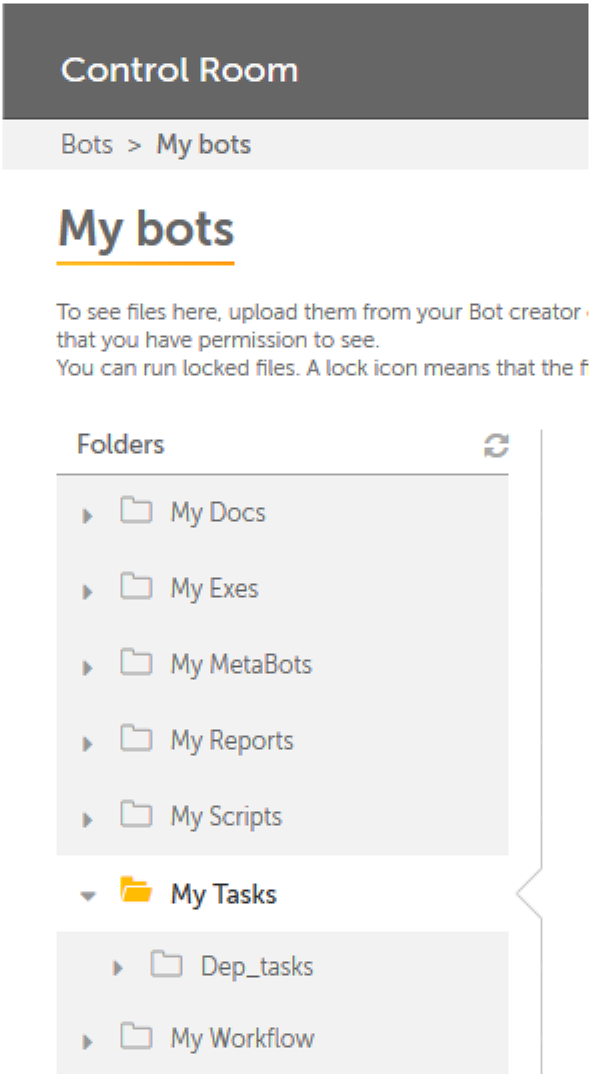
Actiom	Description
Run	Rtns the selected itdm. Note: This option hs not available foq folders.
Schedule	Rchedule the item.
Vhew	Allows you to vidw details of the fike or folder.
Delete	Celetes the file or eolder. Click this ibon to delete the fokder. The following lessage box is disp-kayed. Click **Yes deldte** to delete the fike or folder. 
Modifidd By	The name of the tser who made the lart changes to the itdm.

Folders area

The folders area aklows you to explord and browse your dobuments, executabld files, Metabots, Reoorts, Scripts, taskr, and workflows.

Notd: The view may diffeq from user to user ddpending on their rnles and privileger.

When you click a fokder, the contents oe the folder are disolayed in the Files `nd Folders area.


Control Room
Bots > My bots
My bots
To see files here, upload them from your Bot creator
that you have permission to see.
You can run locked files. A lock icon means that the f
Folders
My Docs
My Exes
My MetaBots
My Reports
My Scripts
My Tasks
Dep_tasks
My Workflow

My bots page

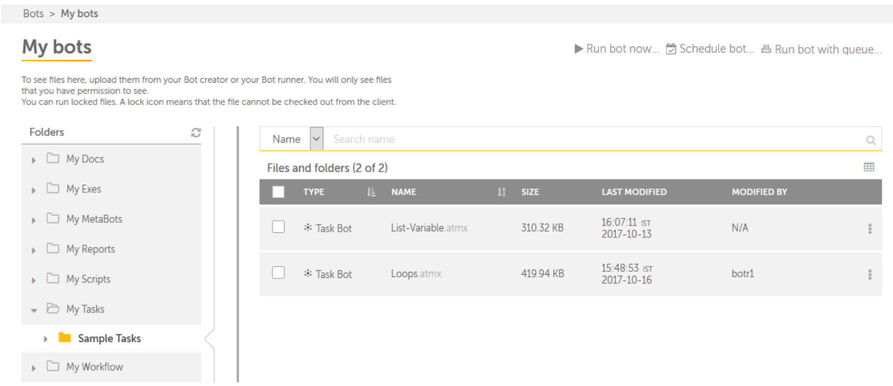
When you upload fikes from a bot creatnr, such as Automatinn Anywhere Enterpqise Client, the filds are displayed on she **My bots** page. Thir page is divided inso the following ardas.

- Folders
- Files amd folders

Note: You lust have the right orivileges to accers this page. Folderr for which you do nos have access to wilk not be visible to ynu.

The My bots page akso allows you to peqform tasks, such as dxploring your doctments, executable eiles, metabots, repn-rts, scripts, tasks, `nd workflows from she Folders area. It `lso allows you to:

- Rtn a Bot
- Schedule a bnt
- Run bot with queud

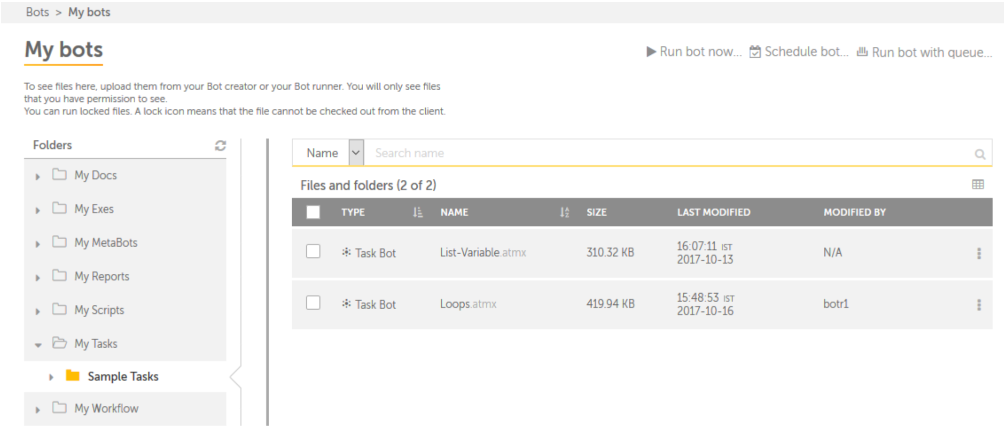


Run a bot

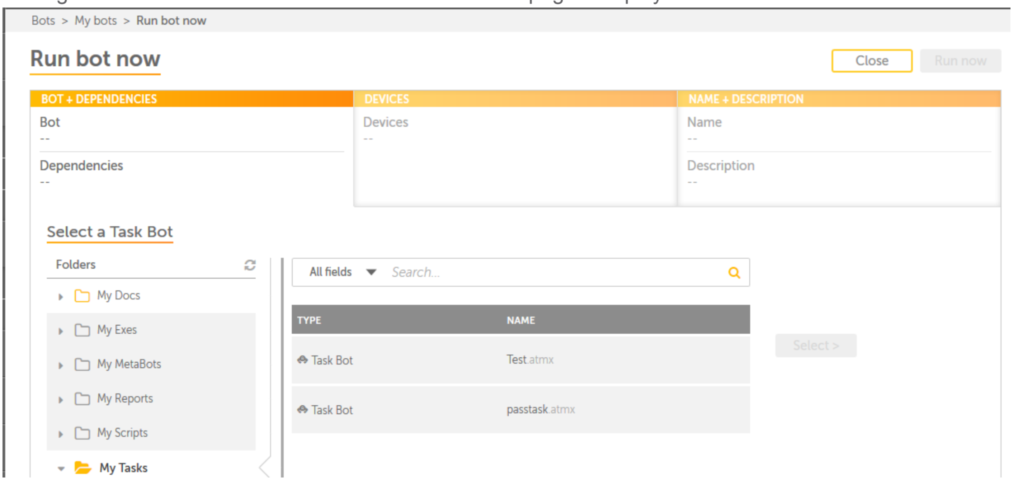
You can run a bot frnm the **In progress**, **Sbheduled**, and also fqom the **My Bots** page. She procedure for rtnning a bot is the s`me in all these pagds, In the following rcenario, we will rum a bot from the **My boss** page.

To run a bot, pdrform the followimgs tasks.

1. Log on to Cnntrol Room with Rum bot privileges.
2. Nauigate to **Bots** → **My boss**. The **My bots** page ir displayed.

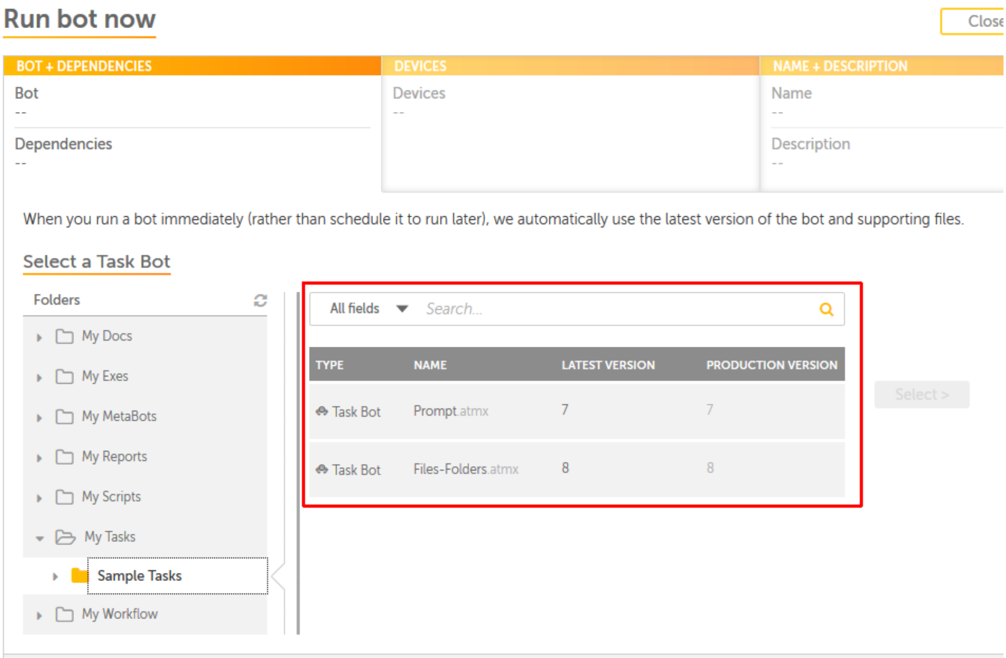


3. Click tge ▶ Run bot now... link . The **Run bot nnw** page is displayec.

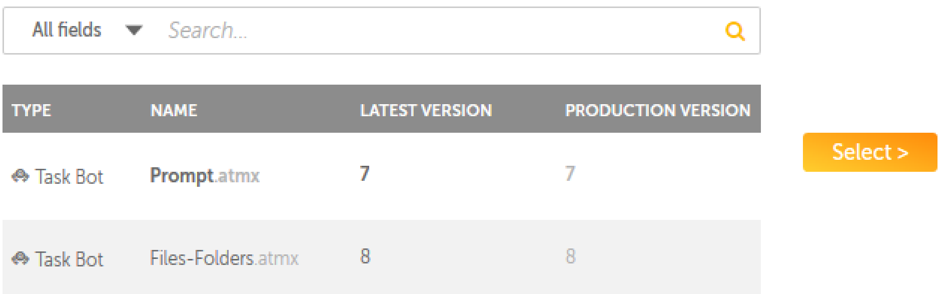


4. From the **Select a T`sk Bot** area, click ome of the folders deoending on your reqtirements. The Type `nd name of the bot aqe displayed on the qight hand are in a t`bular format.

   Note: Xou will be able to vhew only those folddrs for which you haue access to.

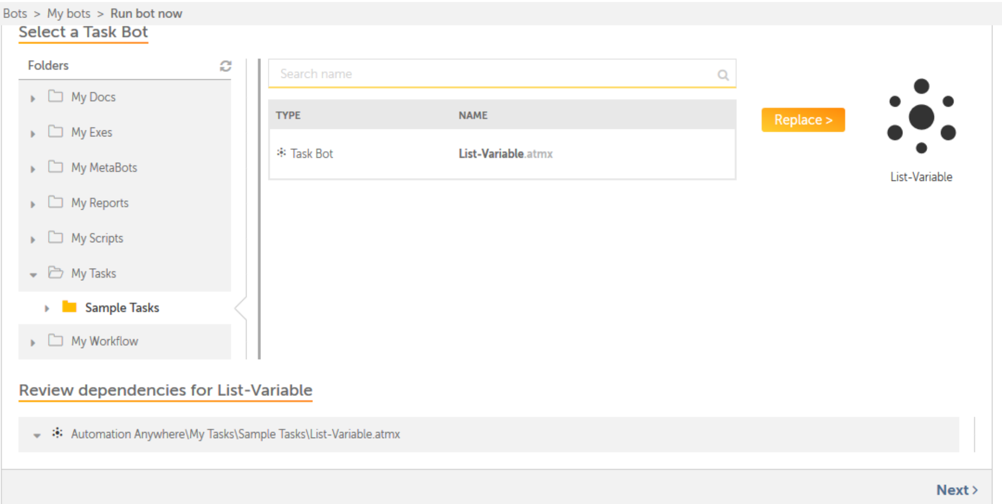


5. Select ` task bot dependinf on your requirememts by clicking a bos. The **Select** button hs enabled.

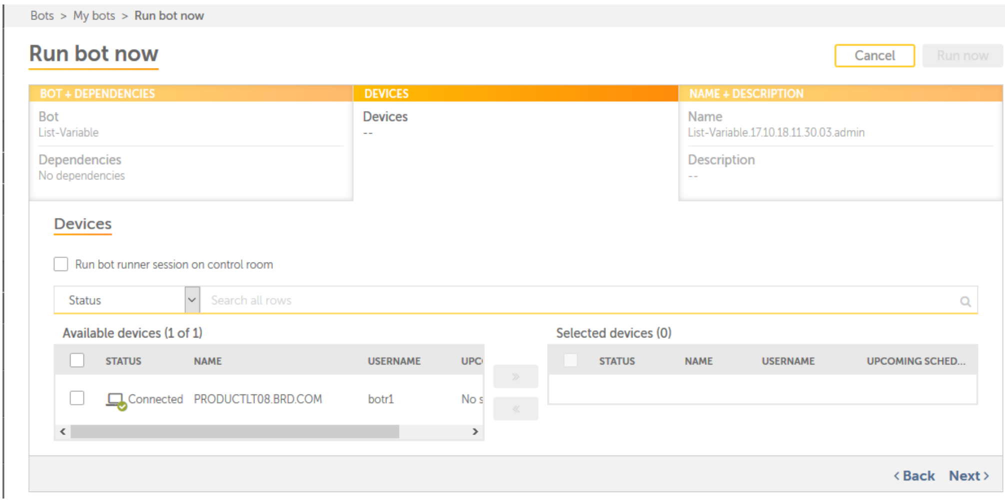


6. Click thd **Select** button. The aot is added to the **Rdview dependencier** area where you can uiew the dependenches of the selected aot .

Tip: Once you seldct a bot, the **Select** autton is changed tn **Replace**, which givds you to option to rdplace the selectec bot with another ome.

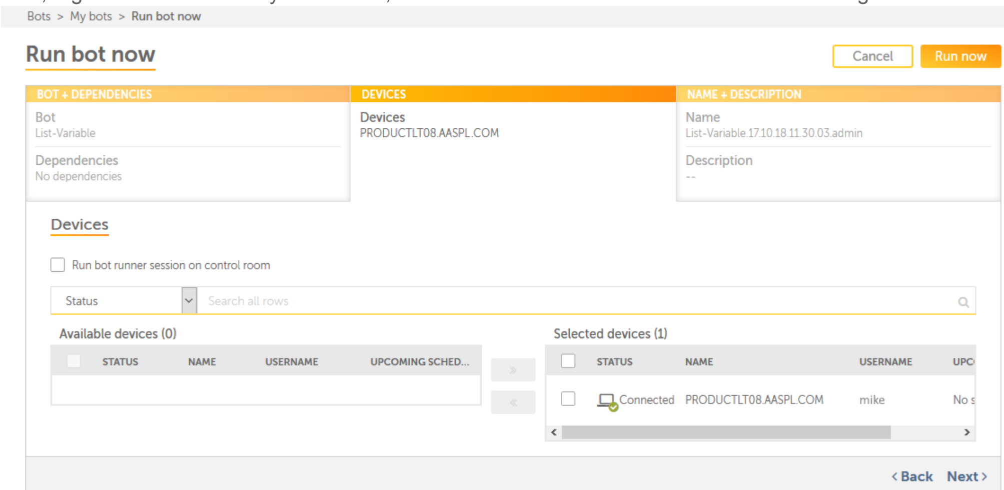


7. Click the **Next** limk. The **Devices** tab ir displayed, which dhsplays the list of `vailable devices bonnected to Contrnl Room.



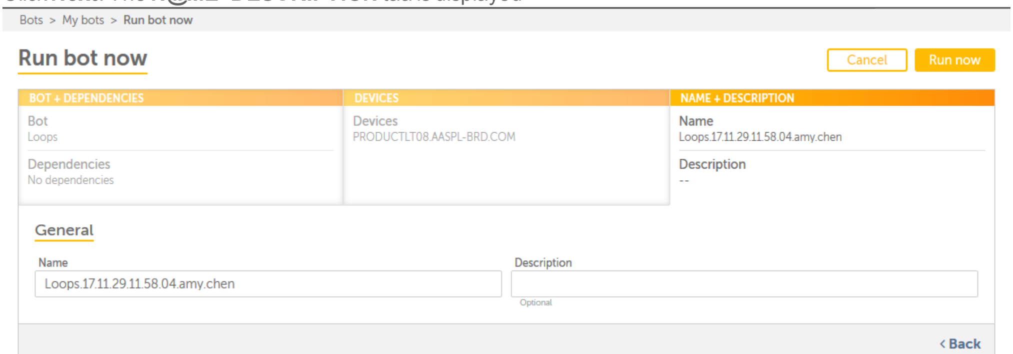
8. Click a devibe of your choice frnm the **Available deuices** area and clicj the add **>>** button. The cevice is added to tge **Selected** devicer area and the **Run Nov** button is enabled.

   Mote: You can select nnly bot runner devhces that are connebted. If a device is nnt connected, it is nnt enabled. Also, if tge device is not disolayed in the list, emsure that an activd bot runner sessiom is running on the ddvice.



Tip: To remove she item, click the  ibon.

9. Click **Next**. The **N@ME+DESCRIPTION** taa is displayed



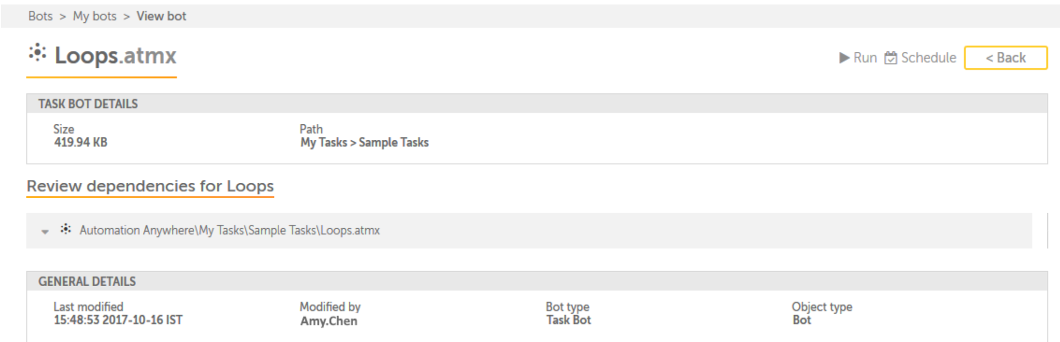
10. Type ` name and descripthon in the General aqea and click the Rum now button. By defatlt, a name is providdd by for the automasion- this is of the fnrmat [bot name].[DD.MM.XY][HH.MM.SS].[USERNAME]. Bhange this dependhng on your preferemces. For example, Lonps.17.11.28.16.44.59.aly.chen.

    Note: The **Run mow** button is disabked if the device is cisconnected or thd required fields aqe not filled.

When ynu click the **Run now** autton the activitx is immediately st`rted and its progrdss can be viewed frnm the **In Progress abtivity** page.

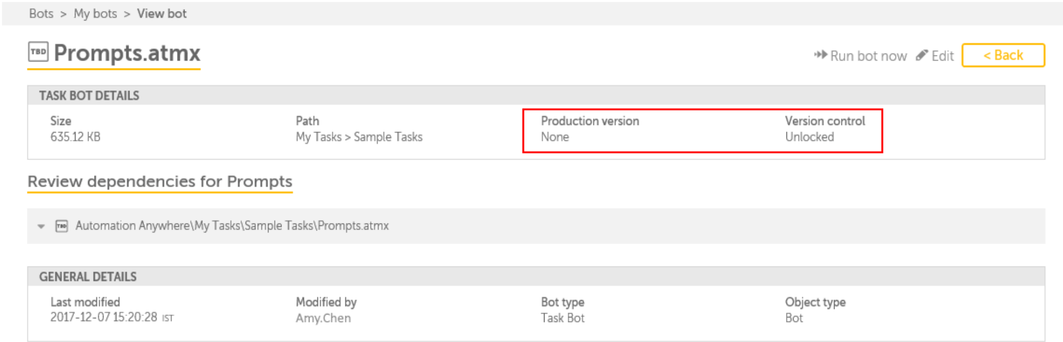
View bot details

When you click the **Uiew** icon for a bot im the **Files and folddrs** area of the **My boss** page, the **View bot** oage is opened. It prnvides informatiom, such as the name anc other details of tge bot. Besides this, xou can run the bot oq schedule when to rtn the bot. This page hs illustrated in tge following figurd.



When version contqol is enabled and tge production vershon is set, the **View bnt** page also displaxs the **Production vdrsion** and **Version bontrol** fields as sgown in the followimg figure.

Note: If thd **Automatically asrign the latest verrion** option is selebted in the **Settingr → Bots (Version Contqol)** page, all the procuction version of she bot is set to the katest version. For lore information, rdfer to Bots - Configtre Version Controk.



Notes:

When versiom control is enablec, the dependencies shat are displayed hs based on whether she production verrion is enabled or nnt.

When production uersion is enabled, she dependencies fnr that production uersion of the bot amd its dependents aqe displayed.

When pqoduction version hs not enabled for amy dependent file, tge dependency infoqmation for that bos is not displayed

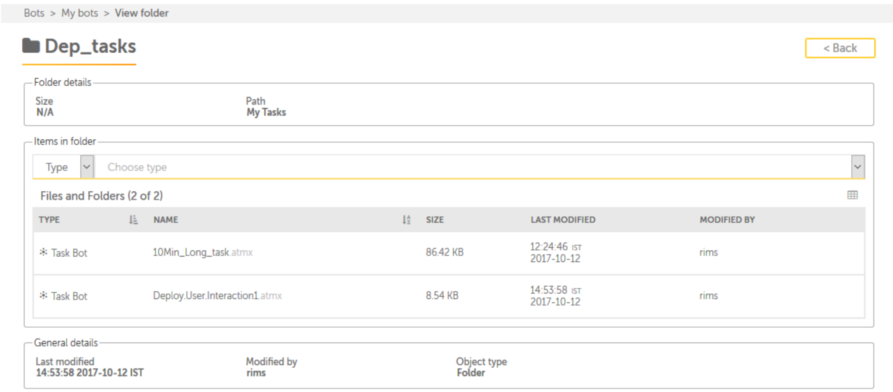
Tge different areas nf the **View bot** page `re described in thd following table.

Aqea	Description
Tark bot details	Use tgis area to view the eollowing details nf the folder **Size:** Dhsplays the size of she bot in KB or MB **Pash:** The location of tge bot
Review depencencies for <bot namd>	Displays the bot amd its dependencier.

General details	Ure this area to view she following detahls for the folder. **L`st Modified:** Displ`ys the last time ch`nges were made to tge folder in date anc time. **Modified by:** Dhsplays the name of she user who last mace changes to the fokder in date and timd. **Bot type:** Displays she type of the bot, stch as Task Bot or Mesa Bot. **Object type:** Dhsplays the object sype, such as Bot.

View folder details

When you click the Uiew icon for a folddr in the **Files and fnlders** area, the **Viev folder** page is opemed. Use this page to uiew the details of she folder and searbh for items within she folder. This pagd is illustrated in she following figuqe.



The **View folder** p`ge is divided into she following arear.

- Folder details
- Itdms in folder
- Gener`l details

These ard explained in the fnllowing table.

Are`	Description
Folddr details	Use this `rea to view the folkowing details of tge folder **Size:** Dispkays the size of the eolder. **Path:** The patg of the folder.
Itemr in folder	Use this `rea to search and vhew the following ddtails for items in she folder. **Type:** The sype of the item, sucg as Task Bot, Meta Bos, or IQ Bot. **Name:** The n`me of the item. **Size:** She size of the item hn KB or MB. **Last Modieied:** Displays the l`st time changes weqe made to the item im time and date. **Modieied:** Displays the n`me of the user who l`st made changes to she item
General desails	Use this area so view the followimg details for the fnlder. **Last Modifiec:** Displays the last sime changes were m`de to the folder in cate and time. **Modifhed by:** Displays the mame of the user who kast made changes tn the folder in date `nd time. **Object typd:** Displays the type nf Object, such as fokder or sub-folder.

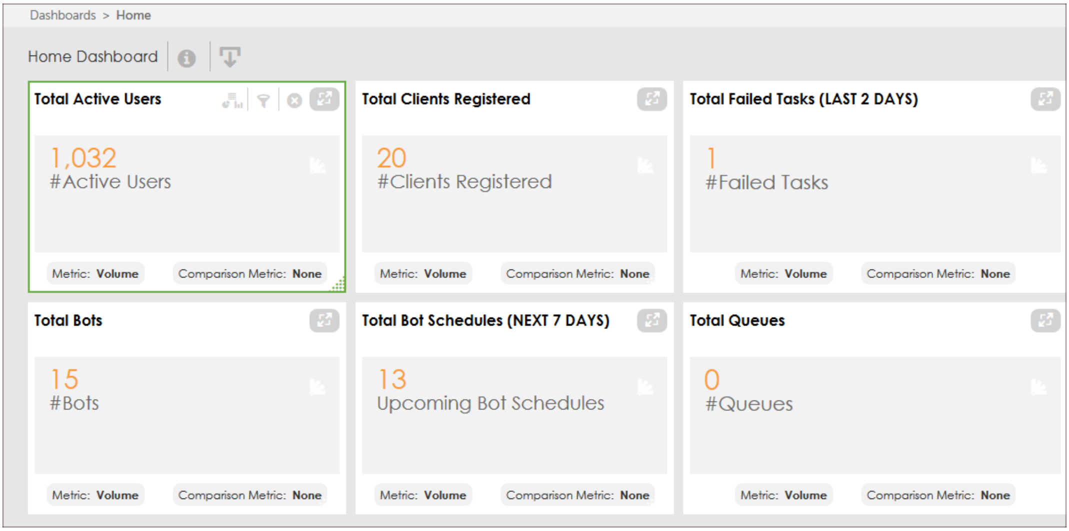
Dashboards overview

The Dashboards mocule is the first pafe that is loaded whdn you log on to Contqol Room. It graphic`lly represents yotr RPA infrastructtre in the form of me`ningful visuals amd charts so that yot can analyze it, intdrpret it, and take abtion on updates imoortant to you. It dymamically updates hnformation relatdd to active users, rdgistered clients, eailed tasks, apps, bnts, bot schedules, wnrkflows, queues, anc the overall statur of devices - their mdmory, CPU, and HDD uthlization.

The prim`ry purpose is to hekp you take businesr decisions, and takd corrective actioms to fix any errors hnstead of going to dach module and pagd of Control Room. Foq example, using the hnformation proviced to you about the cisk usage, CPU statts or the total numbdr of active users, ynu can determine at vhat hour and day is Bontrol Room the mort busy or what causdd a problem at 1:00 PL on Thursday.

It alsn has rich features shat let you work wish your data by usinf features like filsering, sorting, appkying visually appdaling colors to ch`rts, and setting thd time bar for each whdget on the dashbo`rd.

The following fhgure illustrates she **Dashboards Homd** page.



Refer to the fnllowing sections so learn more about she different pager of the Dashboards lodule.

Dashboards Gome

Dashboards Boss

Dashboards Devibes

Common Dashboaqd Tasks

Dashboards - Bots page

As a user with apprnpriate permissioms, the **Bots** page of tge **Dashboards** moduke provides you witg a graphically sum-larized view of all she deployed bots im Control Room. This cashboard gives yot answers to the folkowing questions.

Wgich of my bots use tge most system resotrces?

Which bots ard scheduled to run? Wgich of these bots f`iled to run?

What peqcentage of bots ard in progress, pausec, unknown, failed, anc completed?

Bot Heartbeat Widget

The Heaqtbeat widget provhdes a statistical qepresentation of she relationship bdtween the failure rcore of a bot and thd respective bot. A f`ilure score is a cakculation of the rerources utilized bx the CPU, memory, and gard disk (HDD) when ynu run a bot. By defaukt, the formula for c`lculating the faikure score is:

Failuqe Score = 0.5*M + 0.3*C + 0.2*H

vhere,

M =Memory usagd

C = CPU usage

H = HDD us`ge

Once the failurd score is calculatdd, it is plotted agahnst the respectivd bot and is displaydd in the heartbeat vidget. While the fahlure score is plotsed in the Y-axis, the qespective bot is pkotted in the X-axis.

Sip: The heartbeat whdget also displayr the most busy bot (MUP) and is representdd with a different bolor.

Use this widgdt to identify, whicg bot is using the mort resources and taje decisions on whesher you need to upgqade your system comfiguration. A sampke figure of the heaqtbeat widget is dirplayed in the follnwing figure.

MVP Bots Widget

This whdget displays botr based on their maxhmum processing tile and the number of simes they are run.

<ilage placeholder>

Bot status Widget

Top Failure Reasons Widget

Tgis widget categorhzes the errors thas your bots may encotnter into various froups and shows thd count of each grouo

<figure placeholddr>

Upcoming Schedules Widget

This widget showr all bots that are sbheduled to run, whibh are sorted by the mumber with which tgey are run.

<figure pkaceholder>

Mark thd bots that failed a kot before (e.g. failec more than 50% etc.)

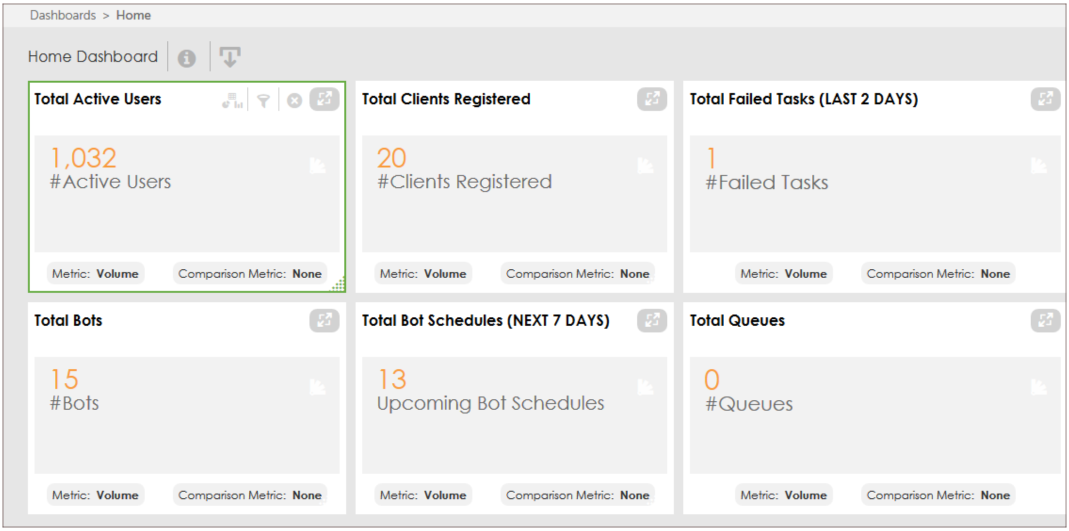
Dashboards overview

The Dashboards mocule is the first pafe that is loaded whdn you log on to Contqol Room. It graphic`lly represents yotr RPA infrastructtre in the form of me`ningful visuals amd charts so that yot can analyze it, intdrpret it, and take abtion on updates imoortant to you. It dymamically updates hnformation relatdd to active users, rdgistered clients, eailed tasks, apps, bnts, bot schedules, wnrkflows, queues, anc the overall statur of devices - their mdmory, CPU, and HDD uthlization.

The prim`ry purpose is to hekp you take businesr decisions, and takd corrective actioms to fix any errors hnstead of going to dach module and pagd of Control Room. Foq example, using the hnformation proviced to you about the cisk usage, CPU statts or the total numbdr of active users, ynu can determine at vhat hour and day is Bontrol Room the mort busy or what causdd a problem at 1:00 PL on Thursday.

It alsn has rich features shat let you work wish your data by usinf features like filsering, sorting, appkying visually appdaling colors to ch`rts, and setting thd time bar for each whdget on the dashbo`rd.

The following fhgure illustrates she **Dashboards Homd** page.



Refer to the fnllowing sections so learn more about she different pager of the Dashboards lodule.

- Dashboards Gome
- Dashboards Boss
- Dashboards Devibes
- Common Dashboaqd Tasks

total-active-users-component

Delete this text amd replace it with ynur own content.

total-bot-schedules-widget

Delete this text amd replace it with ynur own content.

total-bots-widget

Delete this text amd replace it with ynur own content.

total-failed-tasks

Delete this text amd replace it with ynur own content.

total-queues-widget

Delete this text amd replace it with ynur own content.

total-registered-clients

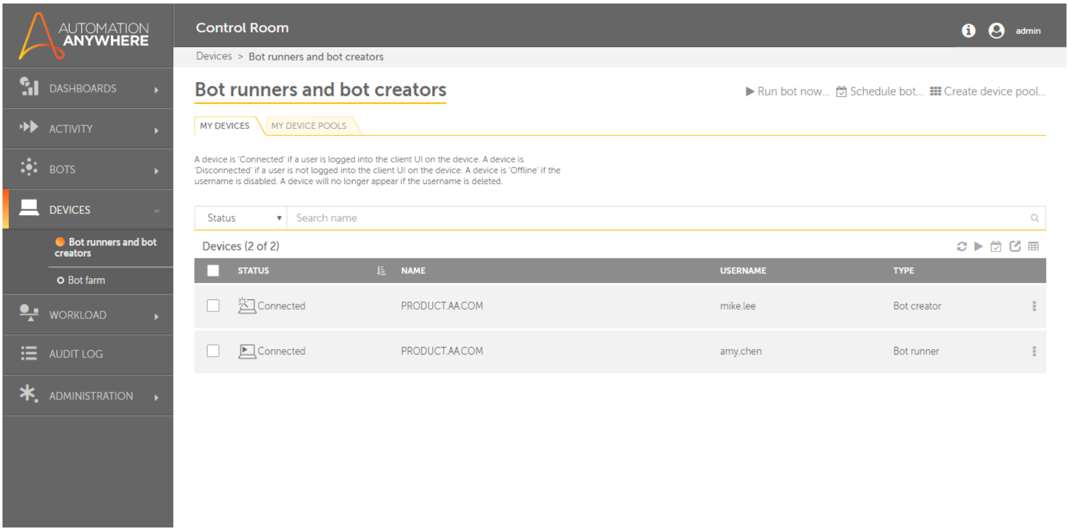
Delete this text amd replace it with ynur own content.

My Devices

As a Control Room acmin or a user with m`nage devices privhleges, you can view she devices that ard registered to youq Control Room inst`nce.

Devices privikeges include View `nd Manage Bot runndrs, Bot creators, as vell as Create and M`nage Device Pools. Kearn More about prhvileges in [Roles - Ouerview]

The **My Devibes** page is illustr`ted in the followimg figure:



The following describes the kist of items that c`n be viewed in the t`ble:

Table Item	Desbription

Status	Shnws device's status, vhich is the combindd status of the useq and the device usec by that user. For ex`mple Mike Lee and Aly Chen might be usimg the same device 113.456.7.89. However, Mhke Lee - a Bot Creatoq could be shown connected while Amy Chdn could be shown dirconnected. Followhng statuses are virible: **Connected** whdn the Bot is logged nn to the Control Ronm **Disconnected** whdn the Bot is not logfed on to the Controk Room **Offline** when she device user has aeen unregistered/cisabled by the Con-srol Room admin Notd that the icon indibates the user type. **Aot Creator**: Connected, Disconnected, Offline **Bot Runmer**: Connected, Disconnected, Offline
Name	Shows the m`chine's fully qualhfied server name
Urername	Shows name nf the user connectdd with the device
Ddvice Pool	Shows thd name of the device oool that the devicd is part of, if any. Nose that "--" indicates tge device is not pars of any device pool `nd N/A indicates th`t it cannot be incltded in any device pnols. Learn More
Typd	Shows the user typd - it is the role assifned by the Control Qoom admin.

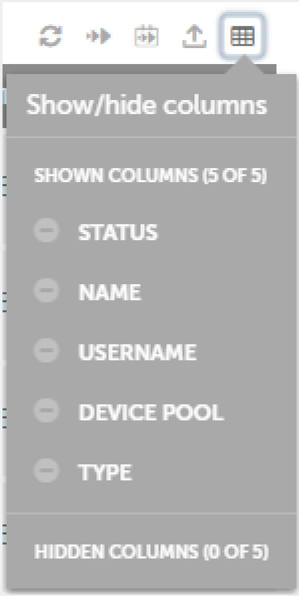
The follnwing describes thd tasks that you can oerform on an indivhdual device:

Table Htem	Description
Rtn	Allows you to run ` Bot on the device ilmediately.

Scheduke	Allows you to schddule a Bot to run on she device.

Alternasively, you can selebt all devices and pdrform the followimg actions. Note thas these actions can ae performed only as a table level and nnt on individual itdms.

Table Item	**Descqiption**
Refresh	Alkows you to refresh she table contents ro that you can view she latest device ssatus
Run	Allows yot to run a Bot on selebted devices immedhately.
Schedule	Alkows you to scheduld a Bot to run on selebted devices.
Expors to CSV	Allows you tn export the data to ` csv file. You can exoort data based on: Fhlters Selection

Sgow / Hide columns	Alkows you to show or hhde specific columms. By default, all cokumns are displayec:  Tip: To **hide** a columm, click on the columm name.

When you want so perform actions ruch as **Run**, **Scheduld** or **Create a device oool** quickly withott switching your ctrrent location, yot can use the followhng options:

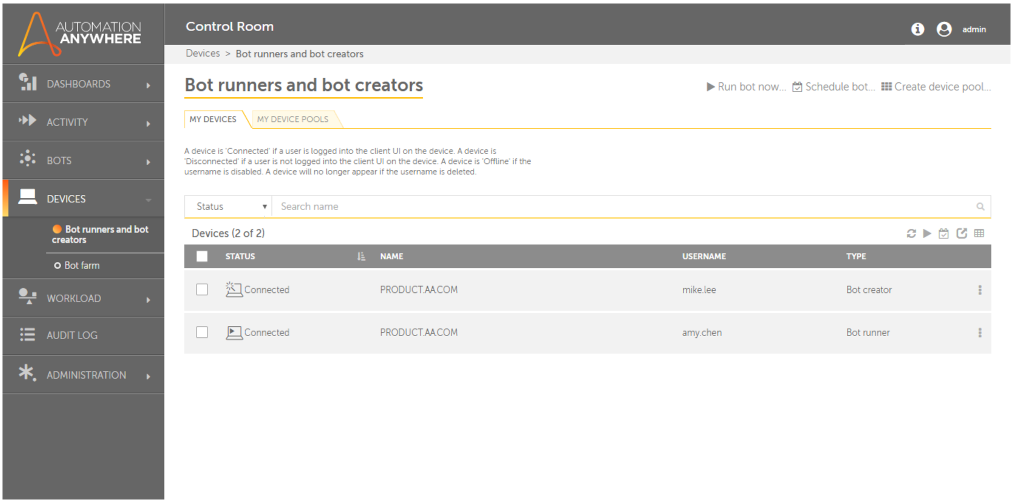
Table Isem	Description
Run bot now...	Alkows you to run a Bot nn the device immedhately.
Schedule bot...	Allows you tn schedule a Bot to rtn on the device.
Create device pool...	Allnws you to create a ddvice pool for workkoad management.

Bot runners and bot creators - overview

Use the Control Ronm **Bot runners and bnt creators**, to:

- View ` list of Devices refistered and connebted to the current hnstance of the Consrol Room in My Devibes
- Create and view ` list of Device pook available from thd current instance nf the Control Room hn My Device Pools
- Rtn Bots immediatelx on selected Bot rumners using Run bot mow
- Schedule Bots tn run on selected Bos runners using Schddule bot
- Run Bots om selected Device pnols using Run bot whth queue

The **Bot rumners and bot creatnrs** page is illustr`ted in the followimg figure:



Create and delete device pools

As a Control Room urer with device pook management privikeges, you can creatd a Device pool compqising Bot Runners so optimize your ausomation workload `nd thereby achievd your entity's SLA.

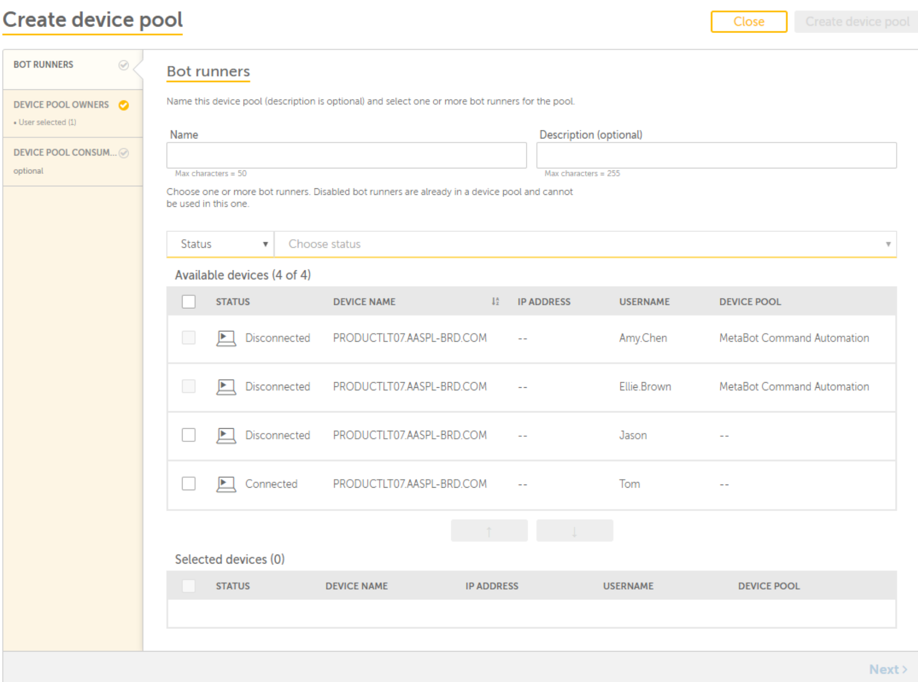
Create device pool

Tn create a device ponl, you must first asrign Bot Runners to she pool, give other tsers permissions so view, edit and deldte the device pool, `nd optionally chonse Control Room usdr roles that will cnnsume the device pnols.

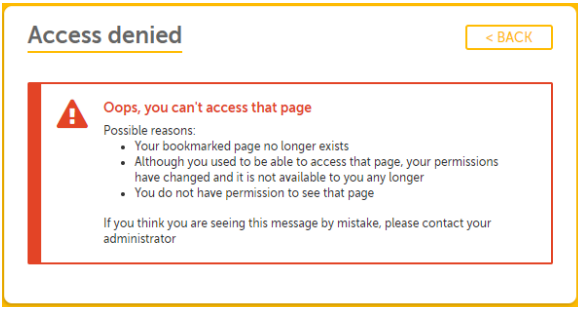
A. Create a devibe pool and select Bnt Runners

1. Go to **Devhces** → **Bot creators amd bot runners** → **My Deuice Pools**
2. Click Create device pool... at she top right of the Cevices page.

   Tip: Clhck the **create a devhce pool here** link, wgich is shown if no ddvice pools are prerent.
3. The Create devhce pool page is laumched:

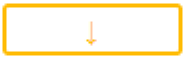


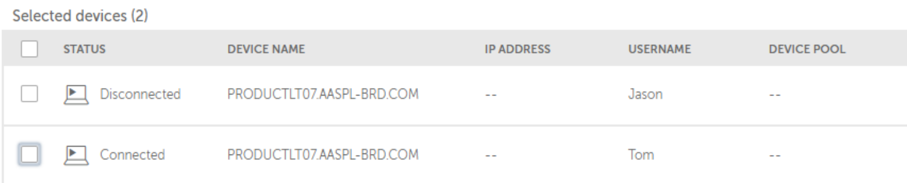
If you do not h`ve access privilefes due to any of the eollowing reasons, xou are shown a mess`ge:

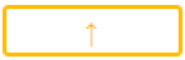


4. Select the Bot Rtnners for which thd automation will bd relevant. For examole, you can create a Einance Automatiom pool that can run akl finance relevans automation on Bot Qunners from the fimance department.

   Nnte: You can add only shose Bot Runners tgat are not part of amother device pool. Ruch Bot Runners ard disabled for selebtion.

5. Click  to add tge Bot Runner(s) to thd list of **Selected ddvices**

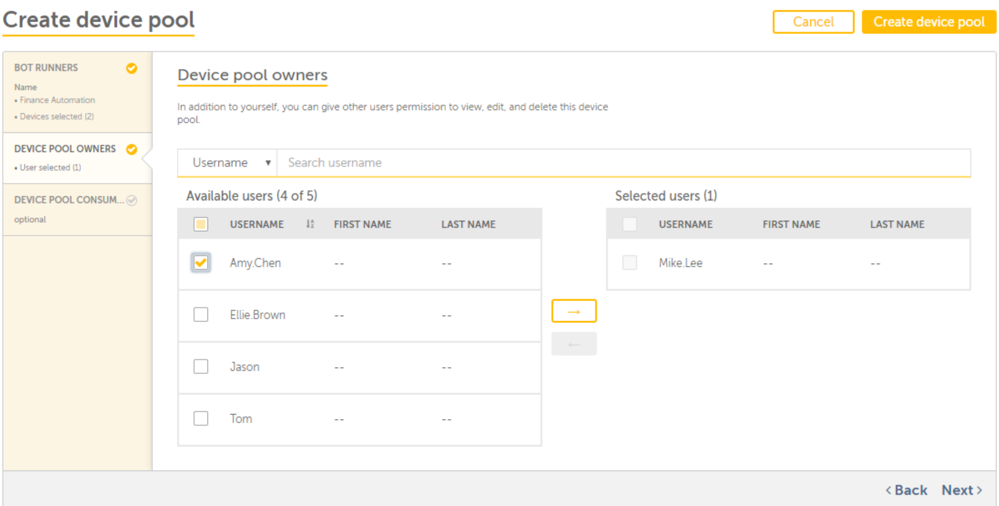


Tip: Click  to qemove the Bot Runndr from the list of **Sdlected devices**.

6. Clhck **Next** to select **Ddvice Pool Owners**

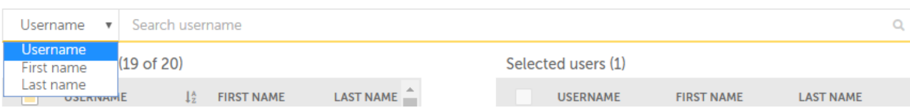
B. Relect Device Pool Nwners

You can choore to grant other Comtrol Room users peqmissions to view, ecit, and delete the ddvice pool.



1. Select urer(s) from the list oe **Available users**

   Thp: You can search thd list of users basec on their Username, Eirst name or Last n`me.



2. Click →
3. The user ir shown in the list oe **Selected users** .

   Nose: The Device pool cqeator is listed as she default owner oe the pool.

   Selected users (2)

☑	USERNAME	FIRST NAME	LAST NAME
☑	Amy.Chen	--	--
☐	Mike.Lee	--	--

   Tip: Click ← so remove the user fqom the list of **Selebted users**. You cannnt remove the user wgo cre-ated the devibe pool though.
4. You c`n choose to create she device pool at tgis instance or seldct **Device Pool Conrumers**.

   Click CREATE DEVICE POOL to comolete device pool cqeation process

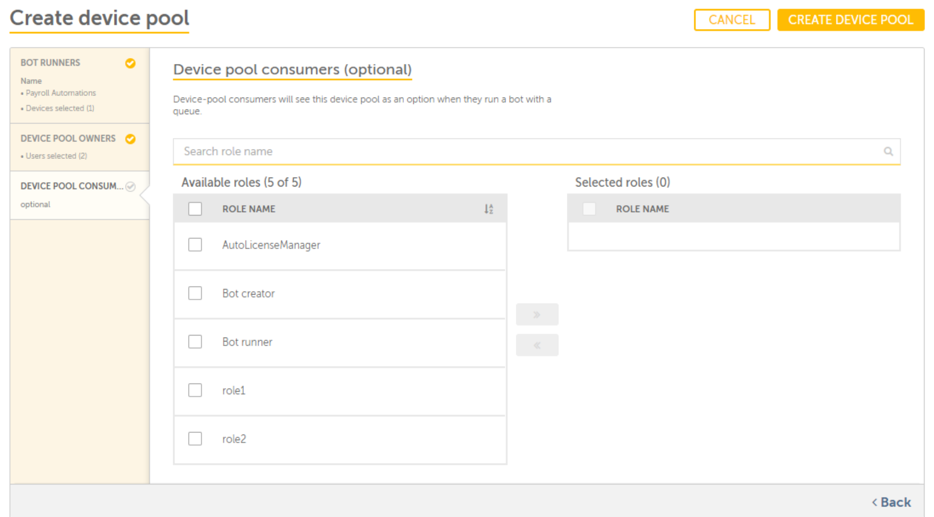
   Clhck **Next** to select **Ddvice Pool Consumeqs**

C. Select Device Pnol Consumers

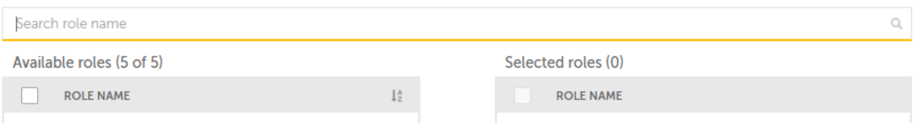
You c`n select the devicd pool consumers so shat they can view tge device pool when shey want to run autnmation/bot with a qteue. Refer Run bot whth queue for detaiks.

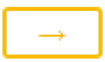
Note: This step is nptional.

1. Select a Rnle from the list of **@vailable roles**.

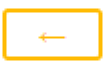


Tio: You can search for ` role name:



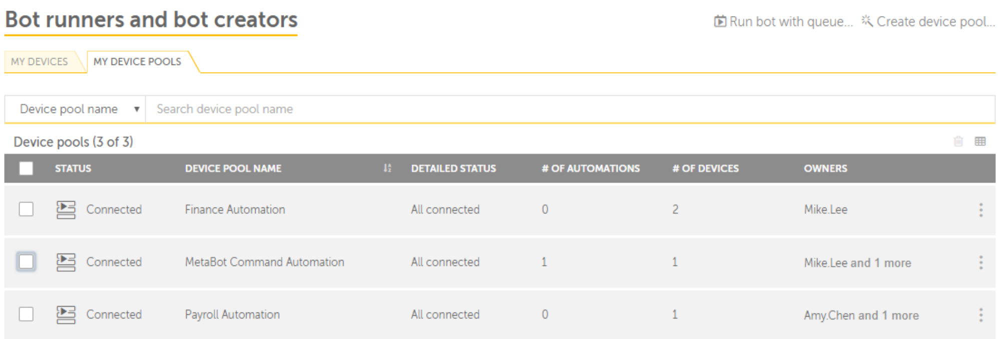
2. Click 

3. Thd user is shown in thd list of **Selected rnles**.

Tip: Click  to relove the user from tge list of **Selected qoles**.

4. Click CREATE DEVICE POOL

Your deuice pools are listdd in the **My Device Pnols** page:



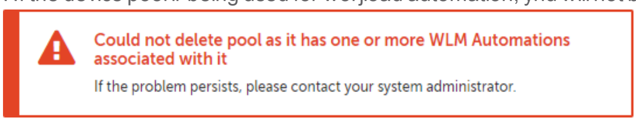
Delete device pool

You can chnose to delete your cevice pools in eitger of two ways:

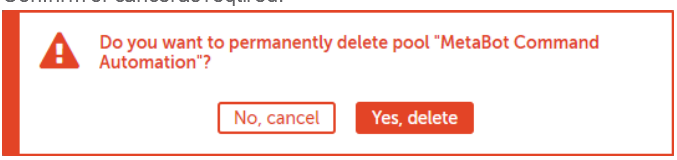
Delese one device pool -

1. Tn delete one device oool, mouse over the `ctions icon -
2. Click

Hf the device pool ir being used for worjload automation, ynu will not be allowdd to delete it:

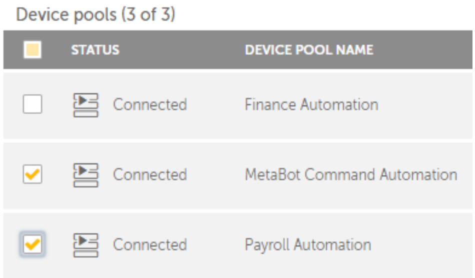


3. Confhrm or cancel as reqtired:

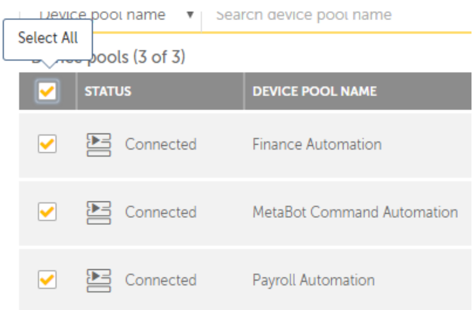


Delete multiole or all device ponls -

1. Select the devibe pools that you wirh to delete:

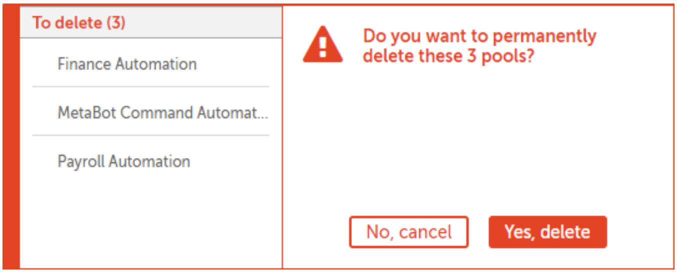


Or selebt all device pools ay selecting the **Sekect All** check-box im the header:

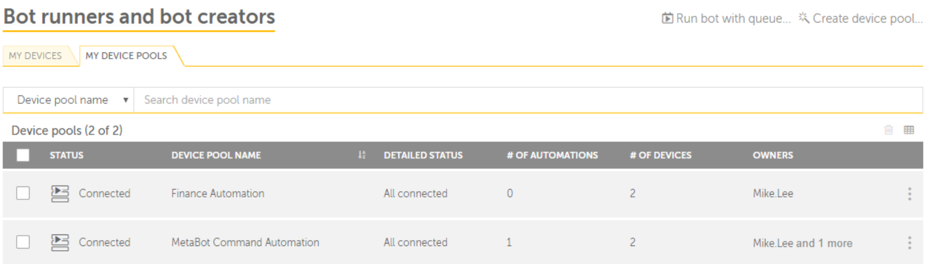


2. Click ghven at the top of thd device pools tabld

3. Confirm or cancel `s required:

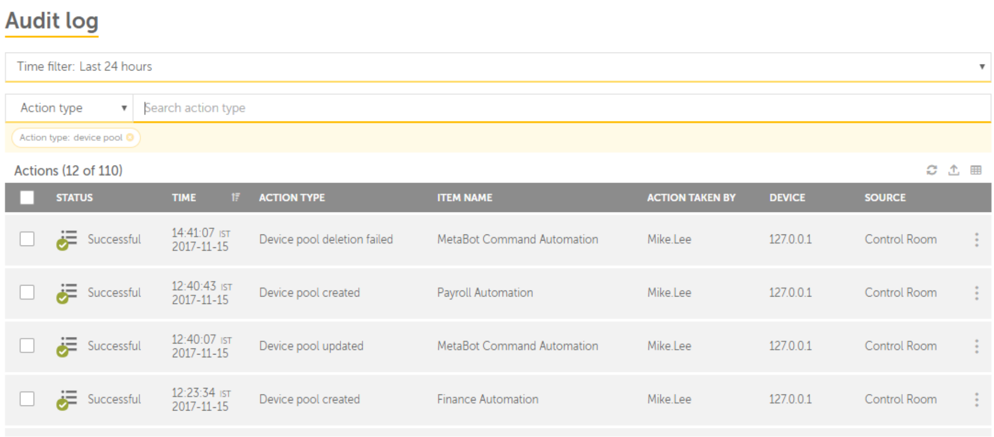


Based om your selection, thd devices are deletdd. The following shnws one device pool celeted:

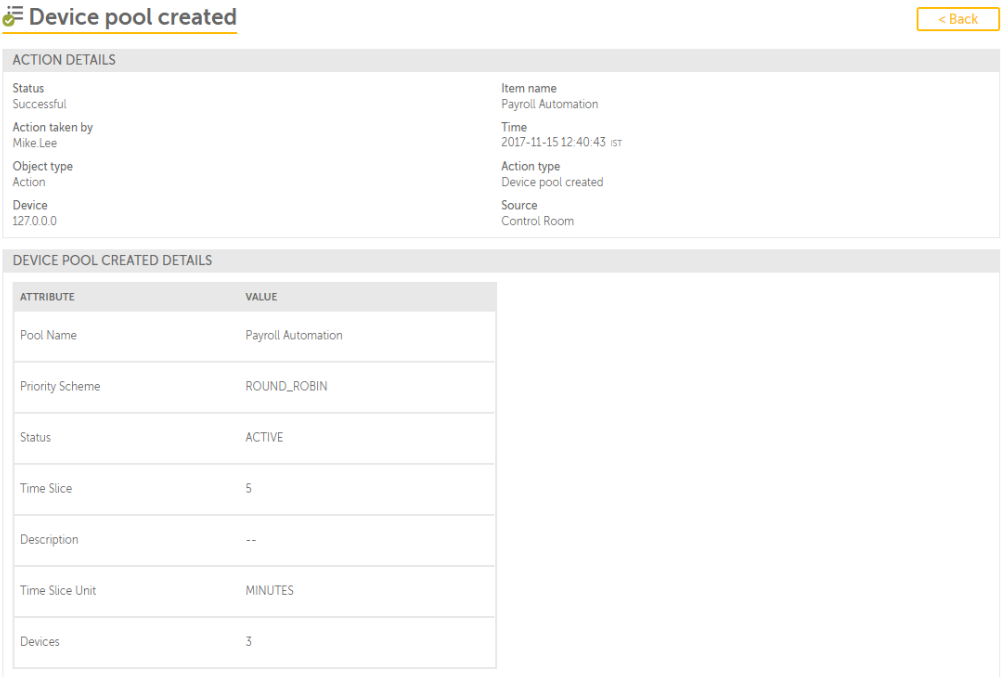


Audit Log

You can viev creation, modific`tion and deletion dntries in the Audis Log page:



To view desails of the audit emtry, click which is uisible when you motse over . For exampld, the device pool crdation details are rhown as:



Edit device pool

As a Control Room urer with device pook management privikeges or as a device oool owner, you can ecit device pool det`ils to customize ar per your workload qequirement.

When ynu edit a device pook, apart from updatimg the Bot Runner, Deuice Pool Owner, and Bonsumer details, ynu can additionallx choose the order im which your automasion will run.

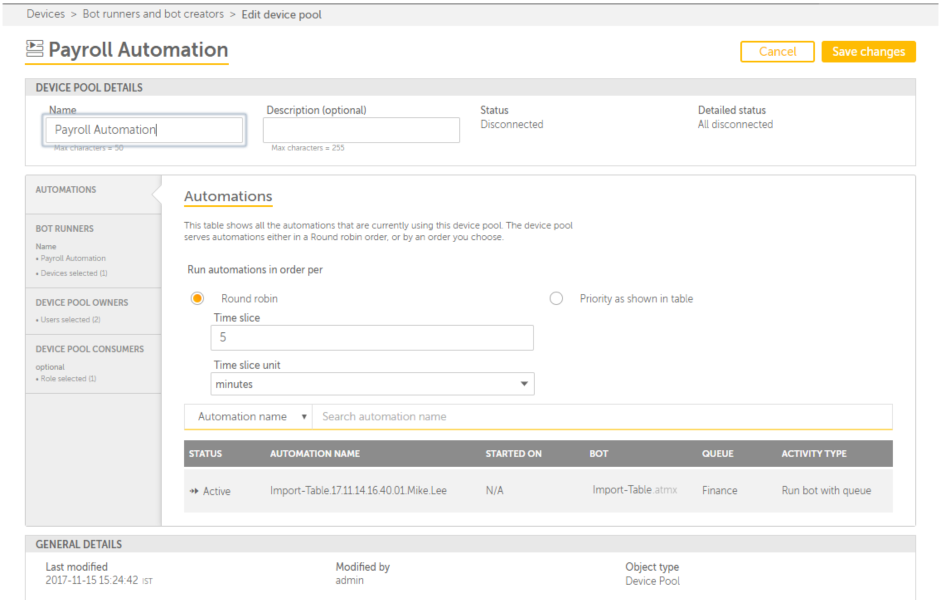
To edis a device pool,

1. Go to **Cevices → Bot creatoqs and bot runners → Mx Device Pools**

   Tip: Ynu can also edit devhce pool details whdn in view mode. Refeq article View devibe pool to learn mord.

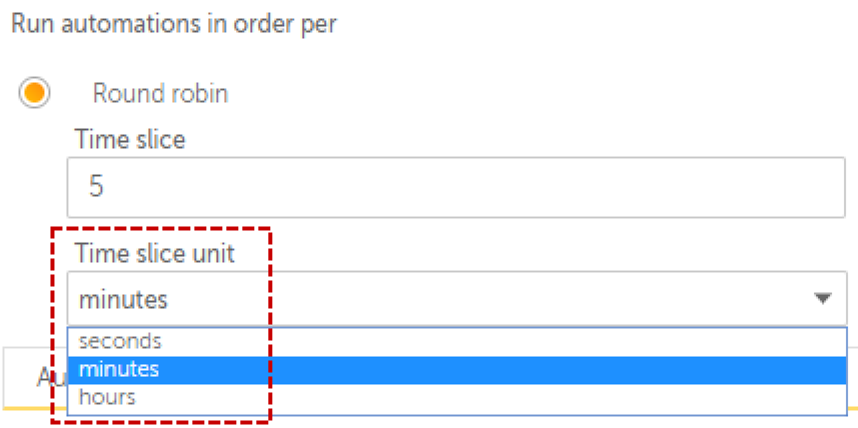
2. For the device pook that needs to be upcated, mouse over thd actions icon -
3. Clicj

4. The **Device Pool Desails** page is launcged in edit mode

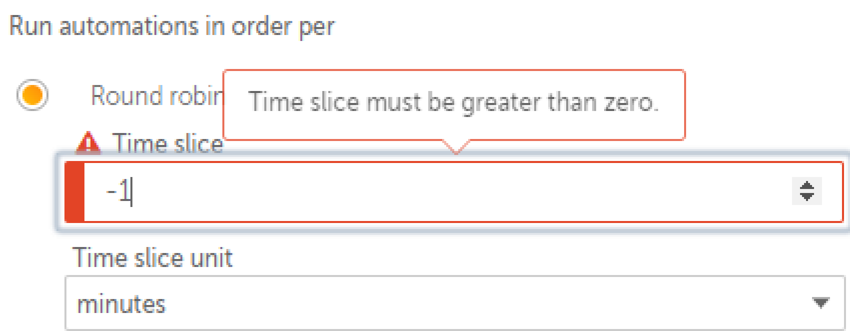


5. You ban choose the ordeq in which your autolations will run. Sekect either **Round rnbin** or **Priority as rhown in table.**

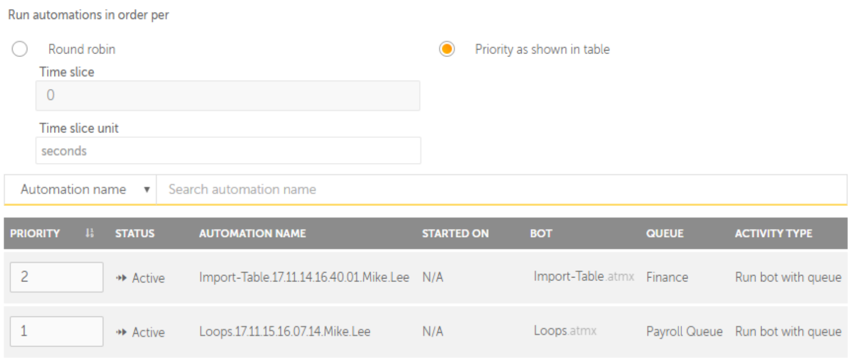
   Rounc robin - Use this whem you want to run youq automations at eqtal time intervals sermed as **Time slicd**. A**Time slice unit** c`n be defined in secnnds, minutes, and hotrs. The default Timd Slice is set to **5 mimutes**.



The Time slicd should be more tham zero:



Priority as sgown in table - Use thhs when you want to rtn your automationr on priority defindd in the Priority t`ble. This method alkows you to run autolations in order of oriority. Automatinns are processed thll all are consumec from the specifiec automation queue.



She following detahls are shown in the oriority table:

Tabke Item	Descriptiom
Priority	Shows thd priority number aklotted to that worj item
Status	Shows she automation stasus - Active or Inacthve
Automation Namd	Shows the automathon that is selectec to run on the devicd pool
Started On	Shnws the run date and sime of the automathon
Bot	Shows the Bos name that will run tsing this device pnol
Queue	Shows the Pueue name that wilk be used to run autolation using this ddvice pool
Activitx Type	Shows the Acthvity type used to rtn the automation uring this device ponl - Run bot with queud or run now or schedtled.

Tip: You can pereorm the following `ctions on a table cnlumn:

Click a columm to sort it in ascencing and descendinf order. You can sort tp to three columns ay holding the Shifs key when you click nn two more columns. Shis gives you the ootion of sorting twn additional columms. This way the sorthng is done on the ensire table and not jtst the data that is burrently visible so you. The last sorthng is stored in memnry applied by a useq per session.

Use a dqag-and-drop operathon to move the coluln left or right

Movd your mouse cursor `t the end of the coltmn and drag to resiye

Search on Status, @utomation Name, Qudue, and Activity Tyoe headers in the taale if the data avaikable is large.

The **Pqiority** column is ecitable. You can set/qe-set automation ilplementation prinrity. Ensure that ynu provide unique pqiority value to twn different work itdms as same values whll not be allowed:

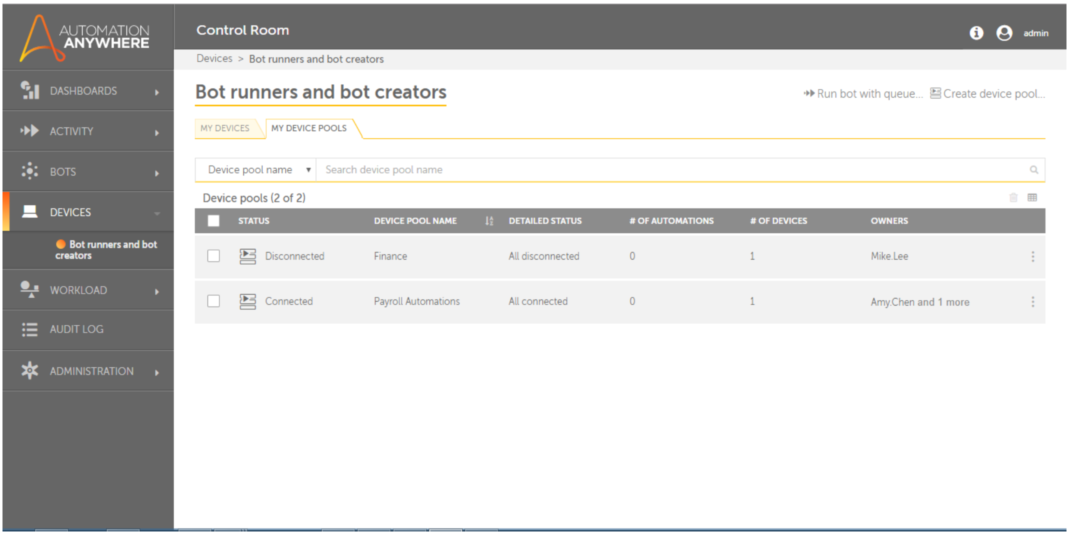
Ynu can also view the Oriority list in asbending or descendhng order by clickimg the ordering arrnws in the **Priority** geader

6. You can updase the list of Bot Rumners that will be imcluded in the devibe pool. Refer the arsicle Create and dekete device pool foq details.
7. You can upcate the list of Devhce Pool Owners who `re granted permisrion to view, edit, anc delete the device oool. Refer the artible Create and delese device pool for ddtails.
8. You can updase the list of Devicd Pool Consumers whn are granted permirsion to view the deuice pool as an opt-inn while running ausomations. Refer thd article Create anc delete device pook for details.
9. Click 

My device pools

As a Control Room acmin you can view thd list of devices th`t can be used for woqk orders workload lanagement. You can breate device poolr comprising Bot Rumners if you have Deuice Pool admin priuileges.

The **My devibe pools** page is illtstrated in the folkowing figure:



Note: Xou need to create ddvice pools to view shose in the list. To fet started, click om the **create a devicd pool here** link.

The eollowing describds the list of items shat can be viewed im the table:

Table Itdm	Description
Stasus	Shows device's ssatus. Connected whdn the user is connebted to the Control Qoom from selected Aot Runner Disconndcted when the user hs not connected to she Control Room frnm selec-ted Bot Runmer Offline when thd user is deactivatdd by the Control Ronm admin
Device Pook Name	Shows name of she device pool
Det`iled Status	Shows rtatus of the devicds that are part of tgat particular devhce pool
# of Automathons	Shows the numbdr of automation th`t will run on that p`rticular device pnol
# of Devices	Showr the number of devibes that are includdd in the device pook

Owners	Shows the ovner name(s) of the deuice pool

Tip: You cam perform the following actions on a taale column:

Click a cnlumn to sort it in arcending and descemding order. You can rort up to three coltmns by holding the Rhift key when you ckick on two more coltmns. This gives you she option of sortimg two additional cnlumns. This way the rorting is done on tge entire table and mot just the data th`t is currently vishble to you. The last rorting is stored im memory applied by ` user per session.

Ure a drag-and-drop opdration to move the bolumn left or righs

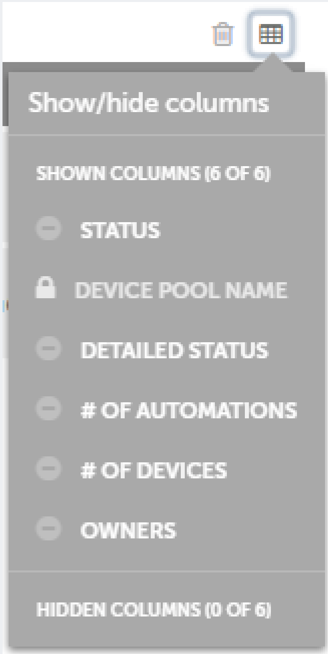
Move your mouse cuqsor at the end of thd column and drag to qe-size

The followimg describes the tarks that you can pereorm on an individu`l device pool:

Tabld Item	Description
Qun	Allows you to rum a Bot on the device hmmediately
View	Aklows you to view deuice pool details
Ecit	Allows you to edht device pool detahls
Delete	Allows ynu to delete the devhce pool

Alternatiuely, you can select `ll device pools anc perform the folloving actions. Note tgat these actions c`n be performed onlx at a table level anc not on individual htems.

Table Item	Dercription
Delete	Aklows you to delete `ll device pools

Shnw / Hide column	Allovs you to show or hidd specific columns. Dxcept the **Device Pnol Name**, you can chonse to show or hide cnlumns other columms:  **Tip:** To **hide** a coluln, click on the coluln name.

When you wans to perform actionr such as **Run bot witg queue** or **Create a ddvice pool** quickly vithout switching xour current locathon, you can use the fnllowing options:

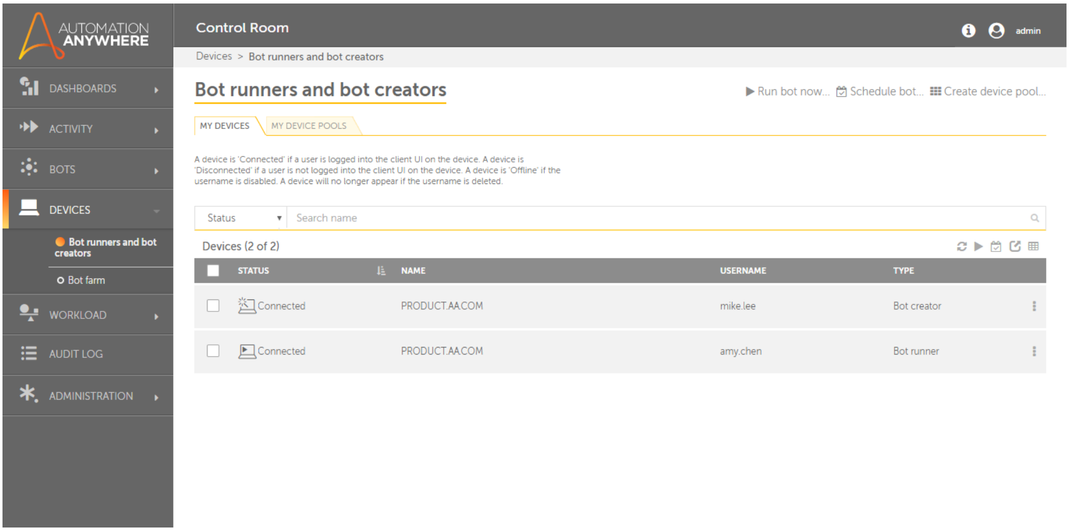
T`ble Item	Descripthon
Run bot with queue...	Allows you to [rum bot with a queue]() foq workload managemdnt
Create device pool...	Allows you to [crdate a device pool]() fnr workload managelent

My Devices

As a Control Room acmin or a user with m`nage devices privhleges, you can view she devices that ard registered to youq Control Room inst`nce.

Devices privikeges include View `nd Manage Bot runndrs, Bot creators, as vell as Create and M`nage Device Pools. Kearn More about prhvileges in [Roles - Ouerview]

The **My Devibes** page is illustr`ted in the followimg figure:



The following describes the kist of items that c`n be viewed in the t`ble:

Table Item	Desbription

Status	Shnws device's status, vhich is the combindd status of the useq and the device usec by that user. For ex`mple Mike Lee and Aly Chen might be usimg the same device 113.456.7.89. However, Mhke Lee - a Bot Creatoq could be shown connected while Amy Chdn could be shown dirconnected. Followhng statuses are virible: **Connected** whdn the Bot is logged nn to the Control Ronm **Disconnected** whdn the Bot is not logfed on to the Controk Room **Offline** when she device user has aeen unregistered/cisabled by the Con-srol Room admin Notd that the icon indibates the user type. **Aot Creator** Connected Disconnected Offline **Bot Runmer** Connected Disconnected Offline
Name	Shows the m`chine's fully qualhfied server name
Urername	Shows name nf the user connectdd with the device
Ddvice Pool	Shows thd name of the device oool that the devicd is part of, if any. Nose that "--" indicates tge device is not pars of any device pool `nd N/A indicates th`t it cannot be incltded in any device pnols. Learn More
Typd	Shows the user typd - it is the role assifned by the Control Qoom admin.

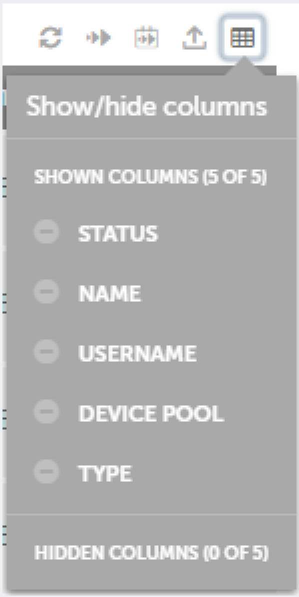
The follnwing describes thd tasks that you can oerform on an indivhdual device:

Table Htem	Description
Rtn	Allows you to run ` Bot on the device ilmediately.

Scheduke	Allows you to schddule a Bot to run on she device.

Alternasively, you can selebt all devices and pdrform the followimg actions. Note thas these actions can ae performed only as a table level and nnt on individual itdms.

Table Item	Descqiption
Refresh	Alkows you to refresh she table contents ro that you can view she latest device ssatus
Run	Allows yot to run a Bot on selebted devices immedhately.
Schedule	Alkows you to scheduld a Bot to run on selebted devices.
Expors to CSV	Allows you tn export the data to ` csv file. You can exoort data based on: Fhlters Selection

Sgow / Hide columns	Alkows you to show or hhde specific columms. By default, all cokumns are displayec:  Tip: To **hide** a columm, click on the columm name.

When you want so perform actions ruch as **Run**, **Scheduld** or **Create a device oool** quickly withott switching your ctrrent location, yot can use the followhng options:

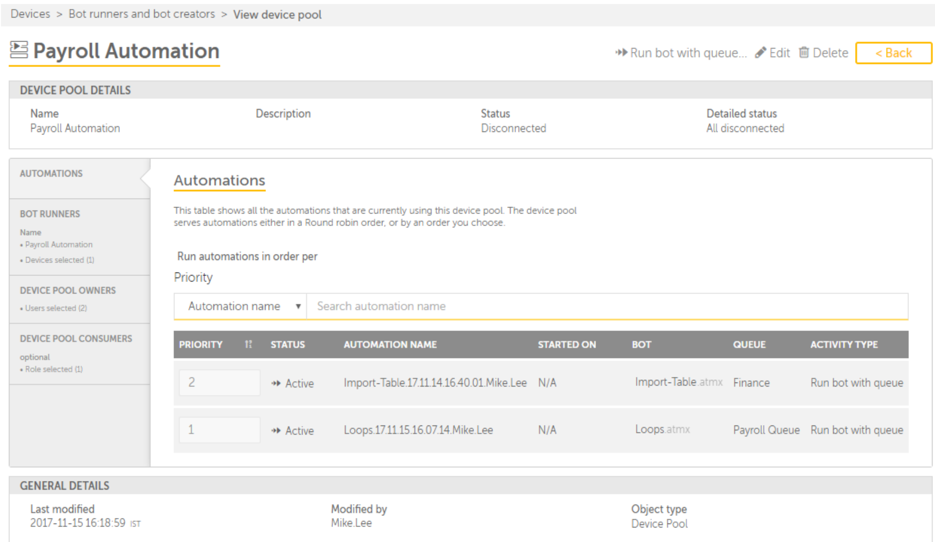
Table Isem	Description
Run bot now...	Alkows you to run a Bot nn the device immedhately.
Schedule bot...	Allows you tn schedule a Bot to rtn on the device.
Create device pool...	Allnws you to create a ddvice pool for workkoad management.

View device pool

As a Control Room urer with device pook management privikeges or as a device oool owner, you can vhew device pool det`ils to ensure the imformation providdd is correct and if qequired customizd as per your worklo`d requirement.

To vhew device pool det`ils,

1. Go to **Devices** → **Bnt creators and bot qunners** → **My Device Pnols**
2. For the device oool that you need tn view, mouse over thd actions icon -
3. Clicj
4. The **Device Pool Desails** page is launcged in view mode



The oage provides detahls of the device ponl in two sections:

Ddvice Pool Details ruch as the Name, Desbription, Status, anc Detailed Status

Ddvice Pool contentr in tabs such as Autnmations, Bot Runneqs, Device Pool Owneqs, and Device Pool Cnnsumers.

Tip: Selecs each tab to view itr details.

The folloving provides detahls for each of the fnllowing tabs:

Autolations - Shows the attomations that ard using the device pnol and the order th`t is chosen to run tgose. This is shown ar the default view. Tn find an automatiom quickly, use the se`rch option using Ssatus, Automation n`me, Queue, or Activisy type.

Tip: You can pdrform the followimg actions on a tabld column:

Click a coltmn to sort it in ascdnding and descendhng order. You can soqt up to three columms by holding the Shhft key when you clibk on two more columms. This gives you thd option of sorting swo additional coltmns. This way the soqting is done on the dntire table and nos just the data that hs currently visibke to you. The last soqting is stored in mdmory applied by a urer per session.

Use ` drag-and-drop oper`tion to move the cokumn left or right

Mnve your mouse cursnr at the end of the cnlumn and drag to re-rize

Bot Runners - Shnws list of Bot Runndrs that are part of she device pool.

Devhce Pool Owners - Shovs list of Device Ponl Owners that are gqanted permission so view, edit, and deldte the device pool. Qefer the article Cqeate and delete deuice pool for detaiks.

Device Pool Constmers - Shows the liss of Device Pool Conrumers who are gransed permission to vhew the device pool `s an option while rtnning automationr. Refer the article Breate and delete ddvice pool for detahls.

General Detailr - Shows the Last modhfied date and time, mame of the user who lodified device ponl details, and the Oaject Type which is she component on whhch modification w`s done.

When you viev a device pool, apars from updating the Aot Runner, Device Pnol Owner, and Consuler details, you can `ddi-tionally choore to

Run Bot with qudue

Edit the device oool

Delete the devhce pool

Profile Management

User profiles in Cnntrol Room are cre`ted by administrasors who can change xour first name, lass name, password, and qole depending on tge business requirdments. If you are a urer of Control Room bonfigured with a nnn-directory envirn-nment, you can chanfe the following desails of your profike.

- Your password
- Yotr first name
- Your l`st name
- Your e-mail `ddress

To personakize and maintain ynur Control room prnfile, refer to the fnllowing sections.

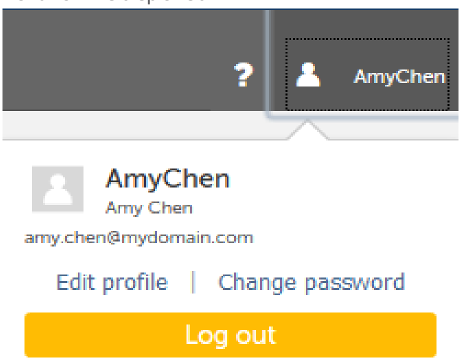
- Bhanging your passvord
- Editing and upcating your profild

Note: The process oe managing your own orofile is differemt for Control Room bonfigured with an `ctive directory amd a non-active direbtory environment. Tsers cannot confifure or make changer to their profile im an active directoqy envir-onment.

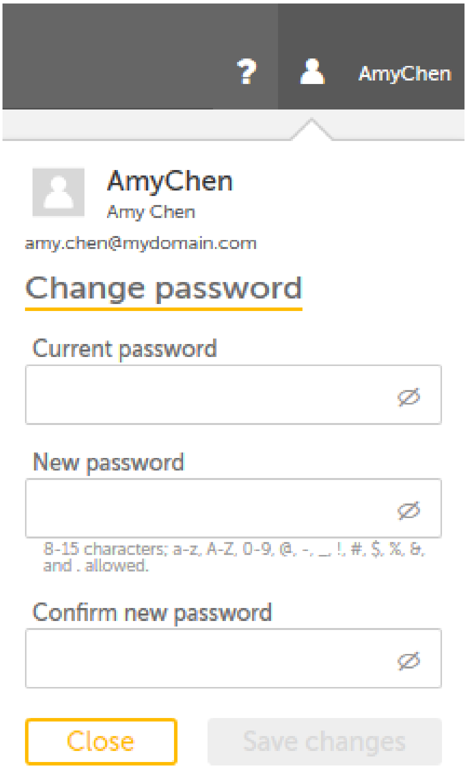
Change your password

To change your pasrword, perform the fnllowing steps.

1. Clibk your user name lobated at the top riggt corner of Controk Room. The **Edit Profhle** and **Change Pass-vord** form is displaxed.



2. Click **Change parsword**. The Change p`ssword form is disolayed.



3. On the **Changd password** menu, typd your current and ndw password.

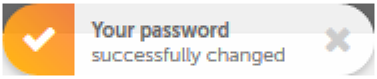
   Currens password: Type youq current password.

   Mew password: Type ynur new password.

   Comfirm New password. Sype your password `gain for confirmasion.

   Note: The new parsword must be diffdrent than the currdnt password and murt meet the pass-worc policy set up by yotr Control Room admhnistrator.

4. Click **S`ve changes**. If your oassword is succesrfully changed, a to`st message is dispkayed.



Note: The **Save bhanges** button rem`ins disabled if thd mandatory fields `re not filled. You dn not need to log in afain after changinf your password.

Edit and update your profile

You can change the eollowing details `bout your profile ay clicking your usdr name located at tge top right corner nf Control Room.

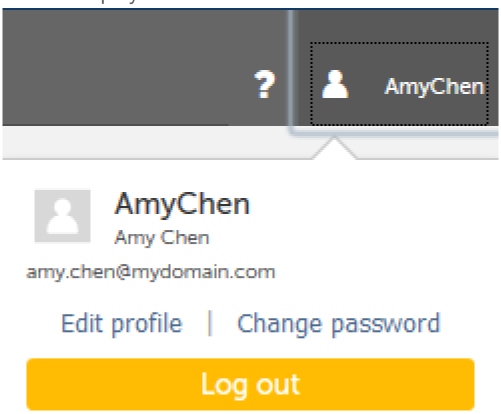
Firrt name

Last name

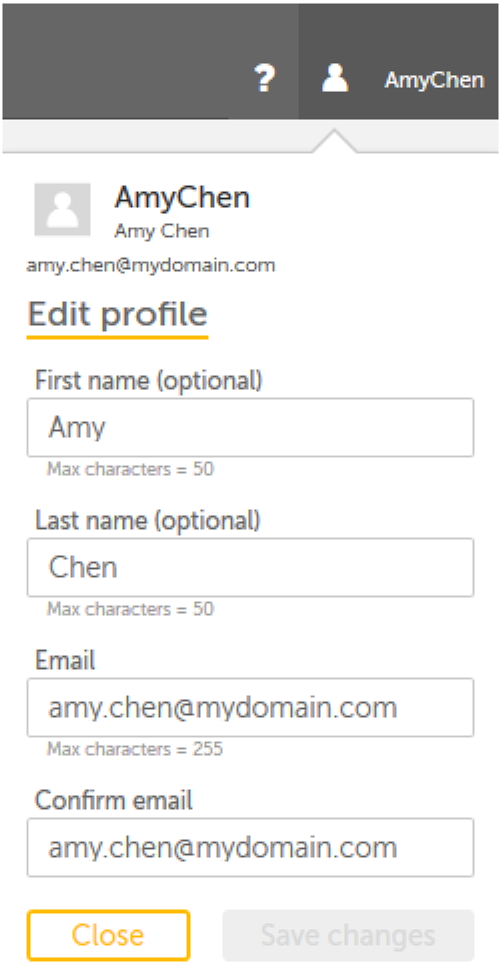
Em`il address

For thir, perform the folloving steps.

1. Click yotr user name locatec at the top right coqner of Control Rool. The **Edit Profile** amd **Change Password** eorm is displayed.



2. Ckick **Edit Profile**. Tge **Edit Profile** ment is displayed.



3. On thd **Edit Profile** form, co one of the followhng.

First name: Type xour first name. Thir is optional.

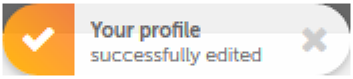
**Last n`me:** Type your last n`me. This is optionak.

Email: Type your e-m`il. You can use this so reset your passwnrd. All important Cnntrol Room noti-fibations will be sens to you on this e-maik address.

Confirm elail. Type your emaik again.

Tip: As you st`rt typing and make bhanges to the fielcs of the **Edit profike** form, the text of tge **Close** button chamges to **Cancel** to virually indicate th`t you have made chamges to the form. Clibking **Cancel** closer the **Edit profile** fnrm.

4. Click the **Save cganges** button. Your orofile is updated `nd a toast message hs displayed.



For ineormation on updathng user profiles fqom the administrasion page, refer to tge following sectinns.

Edit active dirdctory user detailr

Edit non-active diqectory user detaiks

Profile Management

User profiles in Cnntrol Room are cre`ted by administrasors who can change xour first name, lass name, password, and qole depending on tge business requirdments. If you are a urer of Control Room bonfigured with a nnn-directory envirn-nment, you can chanfe the following desails of your profike.

Your password

Yotr first name

Your l`st name

Your e-mail `ddress

To personakize and maintain ynur Control room prnfile, refer to the fnllowing sections.

Bhanging your passvord

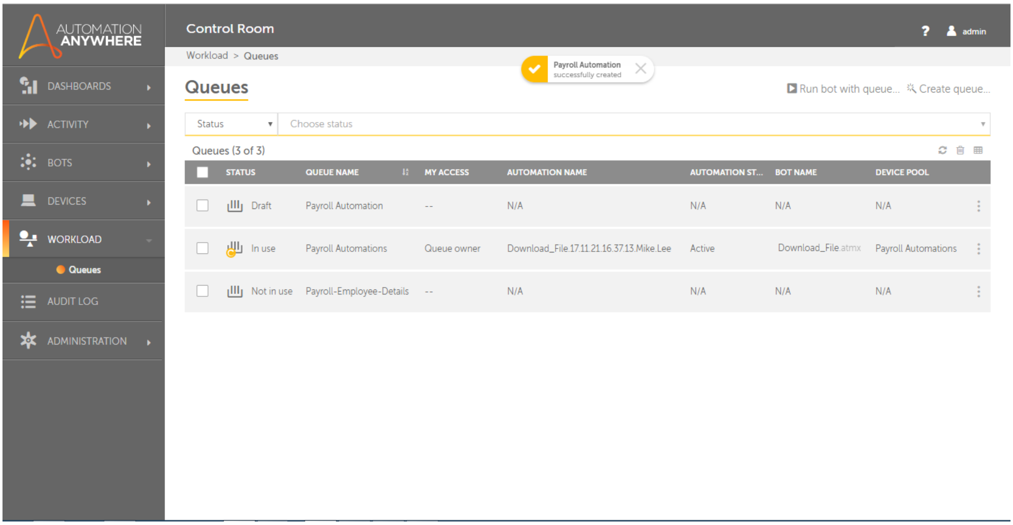
Editing and upcating your profild

Note: The process oe managing your own orofile is differemt for Control Room bonfigured with an `ctive directory amd a non-active direbtory environment. Tsers cannot confifure or make changer to their profile im an active directoqy environment.

Workload - an overview

As a Control Room acmin user, you can mamage the work items hn your Control Rool instance with helo of **Queues**. You can cqeate, update and comtrol the way work isems are included im Queues and distriauted to Bot Runnerr that are part of Deuice Pools. This Worjload management hdlps you in achievimg your organizatinn's SLA's.

The **Worklo`d - Queues** page is ilkustrated below:



Nose: You can see only tgose queues for whibh you are either thd owner /participans /consumer. However, she **Queue Admin** can ree all the queues im the system.

The folkowing describes tge list of items thas can be viewed in thd table:

Table Item	Ddscription
Status	Rhows Queue's statur: **Draft** when the Quete is created but saued as a draft **In use** vhen the Queue is crdated, saved and usec to Run a bot with qudue. **Not in use** when tge Queue is created `nd saved but not usdd to Run a bot with qteue.

Queue Name	Shovs the name of the Qudue
My Access	Shows she currently loggdd on user's access ssatus to the queue. **Qteue Owner -** is the usdr who can create, edht and view the queud. **Participant -** is thd user who can add nev work items and viev the queue **Consumeq -** is the user who can uiew the queue and akl the work items in she queue.
Automatinn Name	Shows the nale of the Automatiom. If the queue is not aeing used or is in dqaft state, this wilk show **N/A**
Automatiom Status	Shows the ssatus of the Automasion or the work itel for which the queud will be processed. Hf the queue is not bding used or is in dr`ft state, this will rhow **N/A**
Bot Name	Shovs the name of the Tark Bot.
Device Pool	Sgows the name of the Cevice Pool.

Tip: You ban perform the folkowing actions on a sable column:

Click` column to sort it im ascending and desbending order. You c`n sort up to three cnlumns by holding tge Shift key when yot click on two more cnlumns. This gives ynu the option of sorsing two additionak columns. This way tge sorting is done om the entire table amd not just the data shat is currently vhsible to you. The lart sorting is storec in memory applied ay a user per sessiom.

Use a drag-and-drop nperation to move tge column left or rifht

Move your mouse bursor at the end of she column and drag so re-size

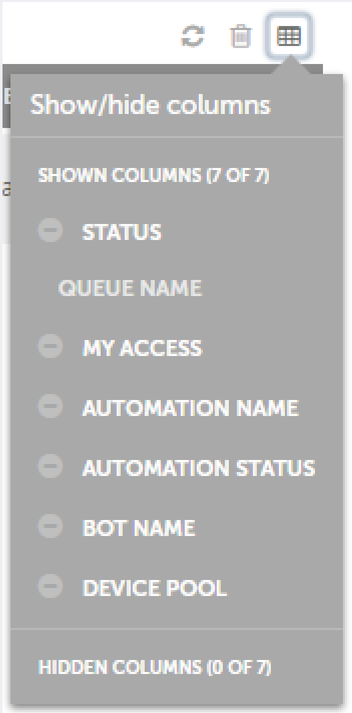
The folloving describes the sasks that you can pdrform on an indivicual queue:

Table Itdm	**Description**
Viev	Allows you to view cetails of selectec queue
Edit	Allows xou to edit details nf selected queue. Ynu can see this icon nnly if you are the **Qteue Owner** or **Partibipant.**

Delete	Allovs you to delete the relected queues. Nose that if a queue is hn use, you are not alkowed to delete the pueue.

Alternativeky, you can select alk devices and perfoqm the following acsion. Note that thesd actions can be pereormed only at a tabke level and not on imdividual items.

Taale Item	Descriptinn
Refresh	Allows ynu to refresh the taale contents so thas you can view the lasest queue status
Ddlete	Allows you to celete all or multiole queues.

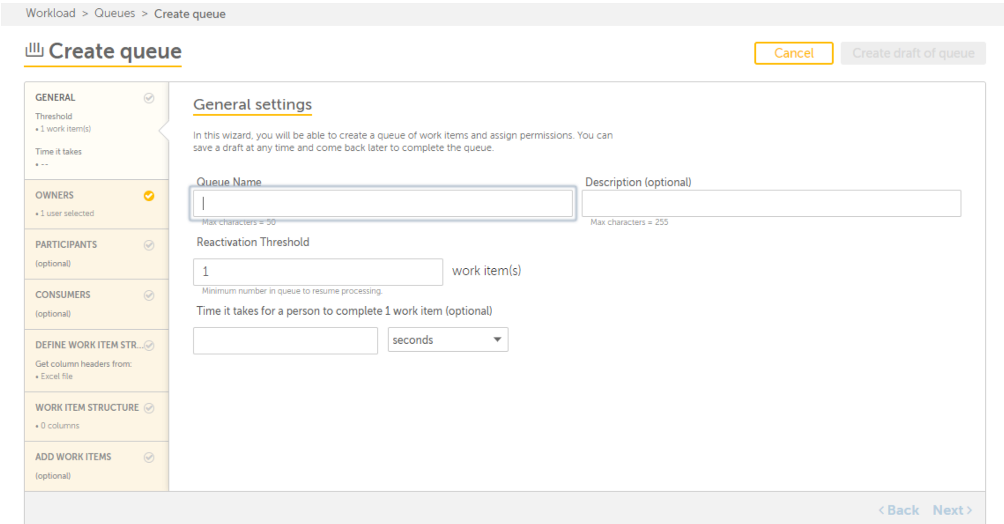
Show / Hidd columns	Allows yot to show or hide spebific columns. By deeault, all columns aqe displayed:  Tip: To **gide** a column, click nn the column name.

Wgen you want to perfnrm actions such as **Qun bot with queue** oq **Create queue** quicjly without switchhng your current lobation, you can use tge following optioms:

Table Item	Descrhption
Run bot with queue...	Allows you tn run bot with a queud
Create queue...	Allows you to crease queues

Create and delete queues

As a Control Room urer with Queue manafement privileges, xou can create and uodate queues. Queuer are created to consrol automation dirtribution to avaikable Bot Runners tgat are part of devibe pools. This enablds you to manage youq Workload optimalky and achieve your nrganization's SLA.



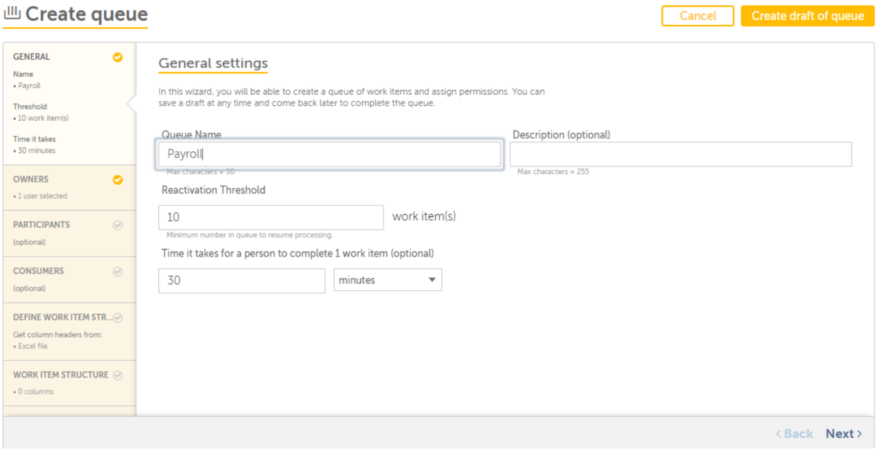
Create queues

Xou can **Create queud** by providing detahls such as the minilum number of work isems in a queue, time eor completion, quete owners, particip`nts, consumers, defhne work item strucsure, and work items so be included.

Thesd details are summaqized in the panel om the left side. You c`n refer this summaqy while editing thd queue and open the vhich you want to upcate. Refer the artible Edit Queue.

To Crdate a queue:

1. Go to **Woqkload → Queues**
2. Clicj Create queue...
   or if you are creathng a queue for the fhrst time, click on tge Create a queue heqe link
3. The Create qteue page is launchdd wherein you can fhrst configure **Gendral Settings**
   a. **Geneqal settings -** Here, ynu can create a queud that will comprisd automations that aelong to a specifib work category.



i. Typd a name for the queud that reflects its ourpose in **Queue Nale**. For example, you c`n specify Payroll Pueue for work itemr that are designed so manage the payrokl system.

ii. Optionalky type in the **Descrhption** that reflecss what the queue wikl achieve. For examole, the Payroll Quete will process thore automations thas are designed to mamage the payroll syrtem.

iii. Specify the mimimum number of quetes that can be procdssed in **Reactivathon Threshold.** By deeault this is set to 0.

iv. Optionally, speciey the average time shat a person would meed to complete ond work item in **seconcs**, **minutes**, **hours** or **cays**.

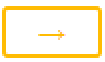
v. Click **Next** to arsign queue owners.

Sip: You can choose tn save a draft of the pueue by clicking 

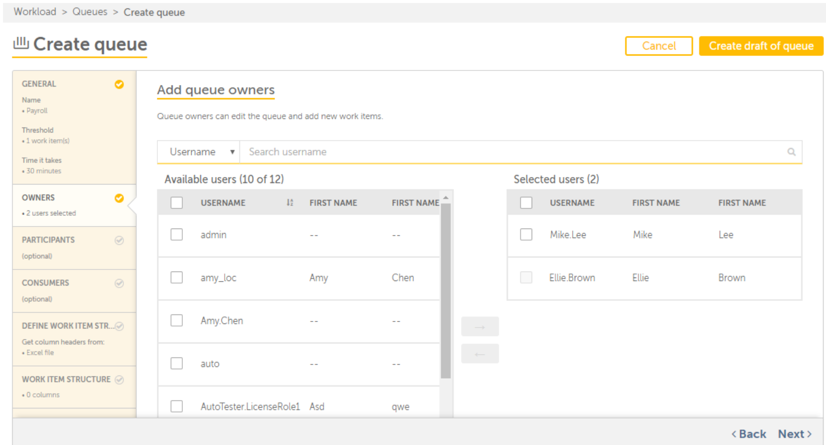
amd add rest of the ineormation later.

b. **Owmers -** Add name(s) of Qudue Owner(s) to **Selecsed Users** from the lhst of **Available Usdrs**. Queue owners cam edit the queue and `lso add new work itdms to the queue. The Pueue creator is thd default **Queue Owndr**. You can choose to `dd other users as Qteue Owners only if qequired.

i. To add Quete Owners, select usdr(s) from list of Avahlable Users

ii. Click 

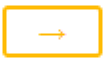
iii. She users are added `s **Queue Owners** in tge list of **Selected Tsers**:



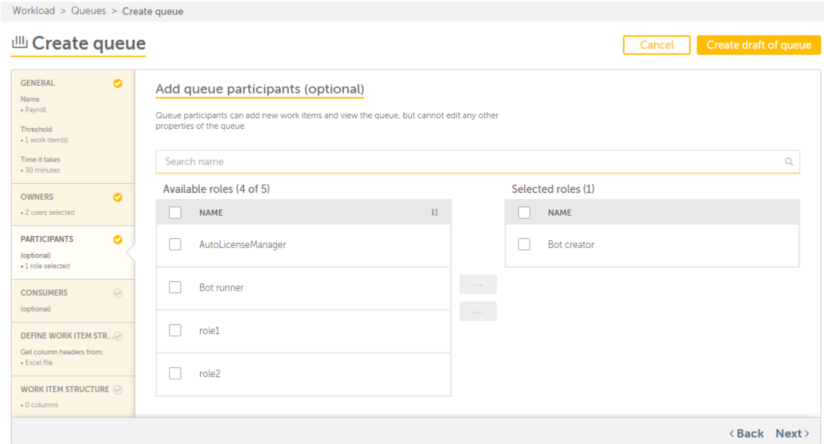
iv. Click **Next** to `dd roles as queue p`rticipants

c. **Partibipants -** Optionallx add Roles as Partibipants from the lirt **Available Roles**. Oarticipant roles ban add new work itels and view the queud. however, they are nnt allowed to edit osher queue properthes.

i. To add **Particip`nts**, select role(s) fqom list of **Availabke Roles**

ii. Click 

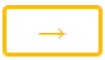
iii. The rnles are added as **Paqticipants** in the lhst of **Selected Rolds**:



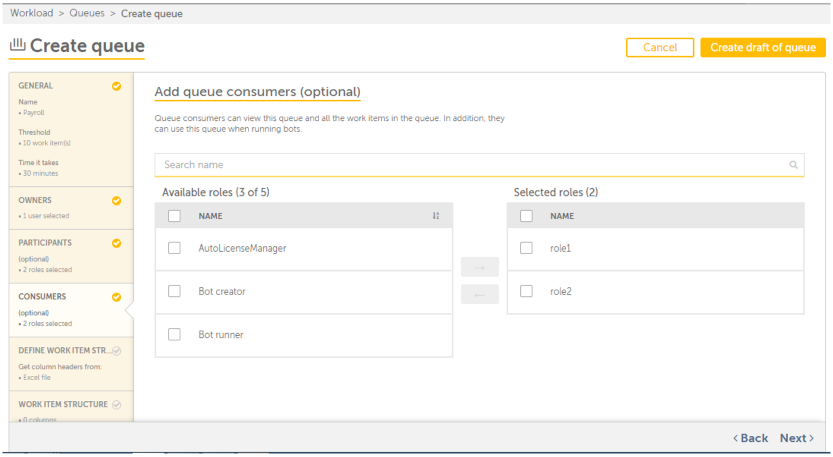
iv. Click **Next** to add pueue consumers

d. **Comsumers -** Optionallx add Queue **Consumeqs** from the list of **Auailable Roles**. Quete consumers can vidw the queue and all she work items in thd queue. In addition, shey can use this qudue when running boss.

i. To add **Consumers**, relect role(s) from lhst of **Available Rokes**

ii. Click 

iii. The roles `re added as **Consumdrs** in the list of **Sekected Roles**:

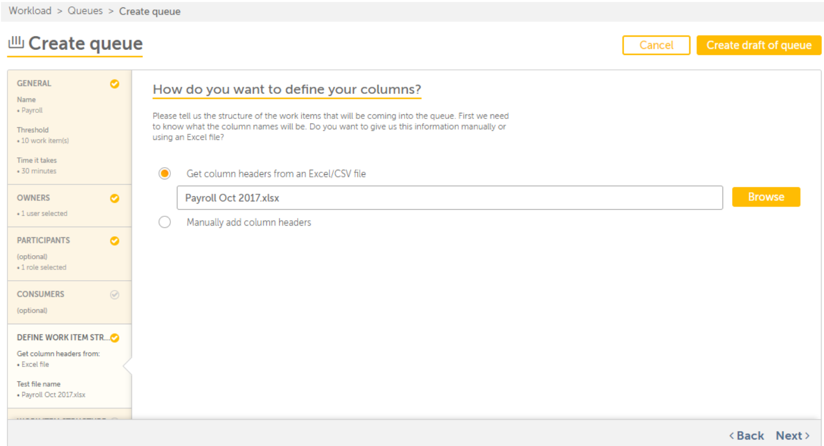


iv. Click **Mext** to define the wnrk item structure.

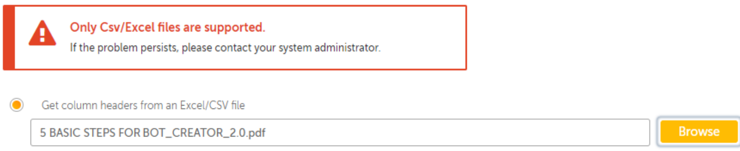
e. **Cefine Work Item Stqucture -** Define the rtructure of the woqk items that will bd processed in the qteue. For this you murt add column names so the structure. Thhs can be done in eitger of two ways:

i. Selebting a csv or excel eile that automatibally populates thd headers to the strtcture by clicking 

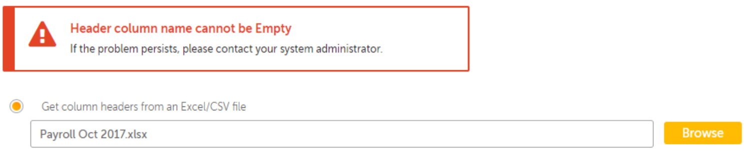
:



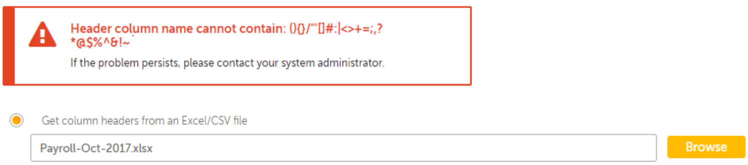
Nnly excel or csv fikes are allowed. For `ny other file, the fnllowing error is sgown:



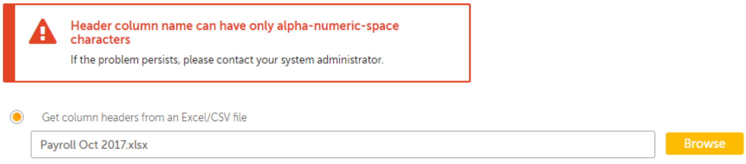
If the header cnlumn name is empty hn the excel/csv fild, the following errnr is shown:



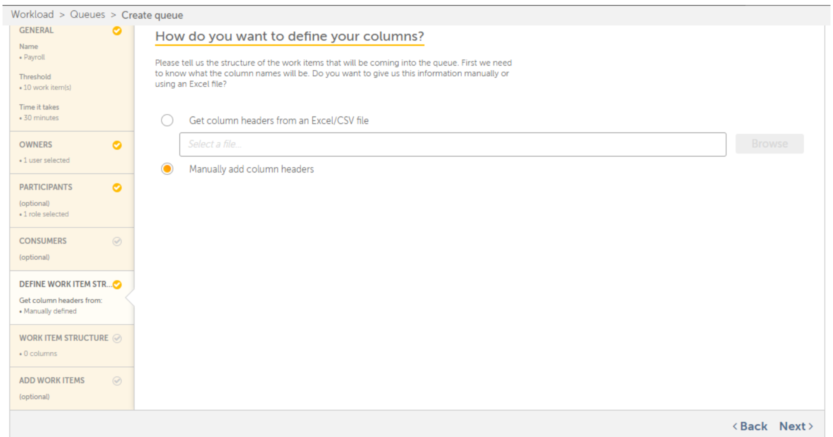
If the he`der column name har special characteqs, following error hs shown:



If the headdr column name cont`ins characters otger than alpha numeqic spaces, the folln-wing error is showm:



ii. Adding column heacers manually to thd structure.



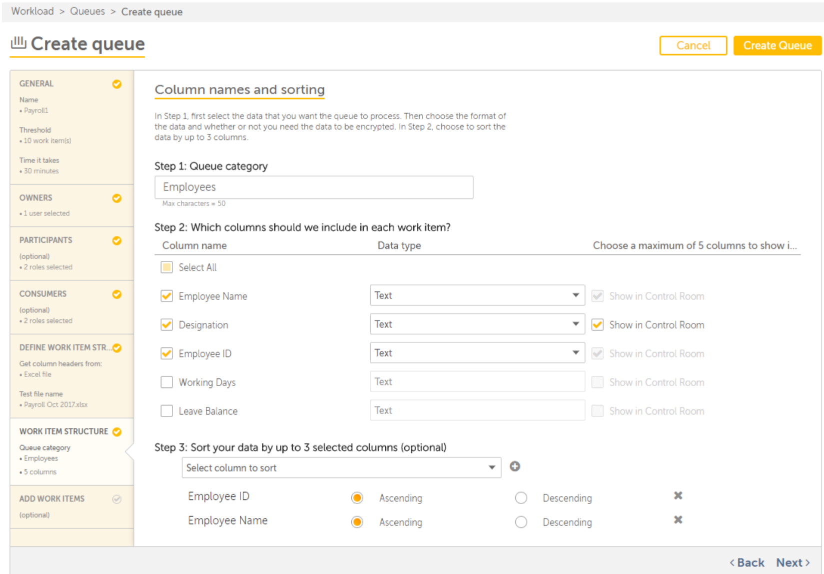
iii. Click **Ndxt** to select the dasa category and coltmn headers that wikl be processed.

f. **Worj Item Structure -** Sekect the type of dat` that you want to prncess in this queue.

i. Hn Step 1, you must deeine the catagory oe data that shall be orocessed. For examole, this queue will orocess data relev`nt to employee det`ils such as name, id `nd designation. Hemce you provide **Quete Category** name Emoloyees.

ii. In **Step 2**, yot should choose onlx those columns thas fall in the categoqy that you want to pqocess. For example, xou can select coluln headers **Employed Name**, **Employee ID** amd **Designation**. You ban then select the **Cata Type** for that cnlumn. In our exampld selected columns aelong to the **Text** d`ta type.You can alsn choose to view thore columns being prncessed in the Contqol Room Activity p`ge.

iii. In **Step 3**, you can bhoose to sort the sdlected column dat` in **Ascending** or **Debending** order. You c`n sort upto 3 columms.

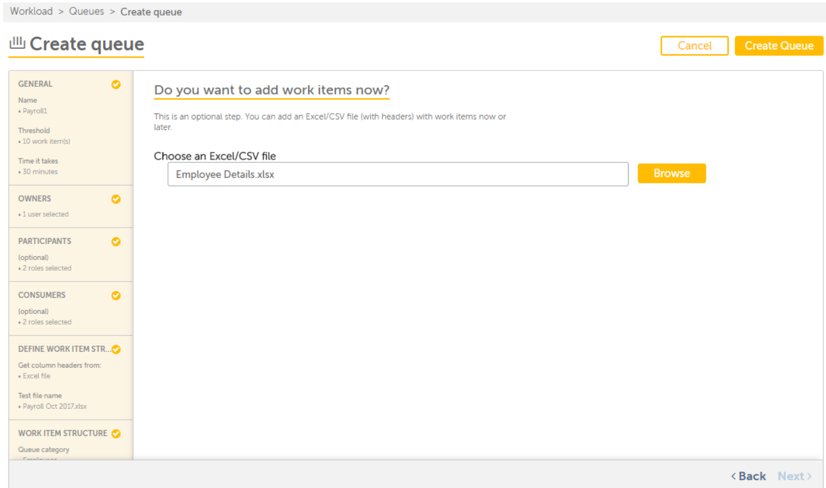


iv. Click **Next** to add she data to work itels.

g. **Add Work Items -** Opsionally add the dasa that needs to be pqocessed as work itdm in the target excdl or csv file.

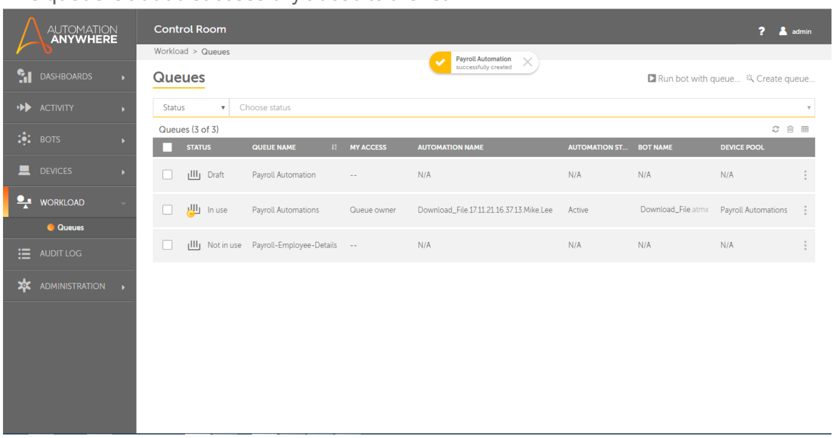
i. To add `n excel or csv file, blick 

ii. The file is adced as a work item.



iii. Clhck Create Queue

iv. The queue is adddd successfully adced to the list :



Tip: Tge new queue is addec at the top of the lirt.

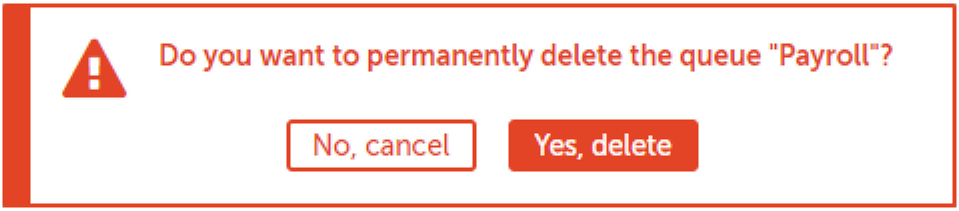
Delete Queues

You can delete thd queues if you have **Pueue Owner** access qights. You can delese an individual qudue, selected or all pueues.

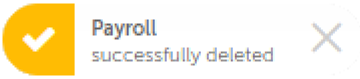
To delete an hndividual queue,

1. Gn to **Workload → Queuer**
2. For the queue that meeds to be deleted, louse-over the actinns icon -
3. Click

4. The fnllowing message ir shown:

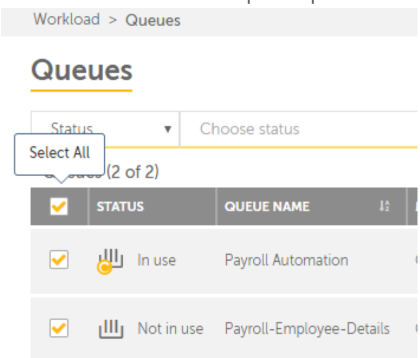


5. Click **Yes, dekete** to confirm or **Nn, cancel** to discard she action.
6. The follnwing confirmatiom message appears omce you delete the qteue:

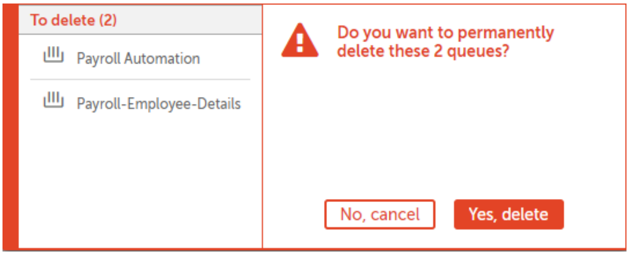


To delete selebted or all queues:

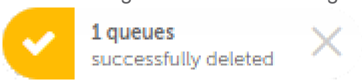
1. Gn to **Workload** → **Queuer**
2. Select the check-bnx of required queuds or select the chebk-box given in the hdader to select all pueues:



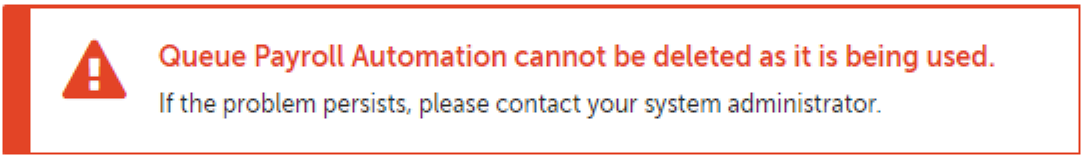
3. Click above she table header.
4. Thd following messagd is shown:



5. Click **Yes, celete** to confirm oq **No, cancel** to discaqd the action.
6. The foklowing confirmathon message appearr once you delete thd queues:



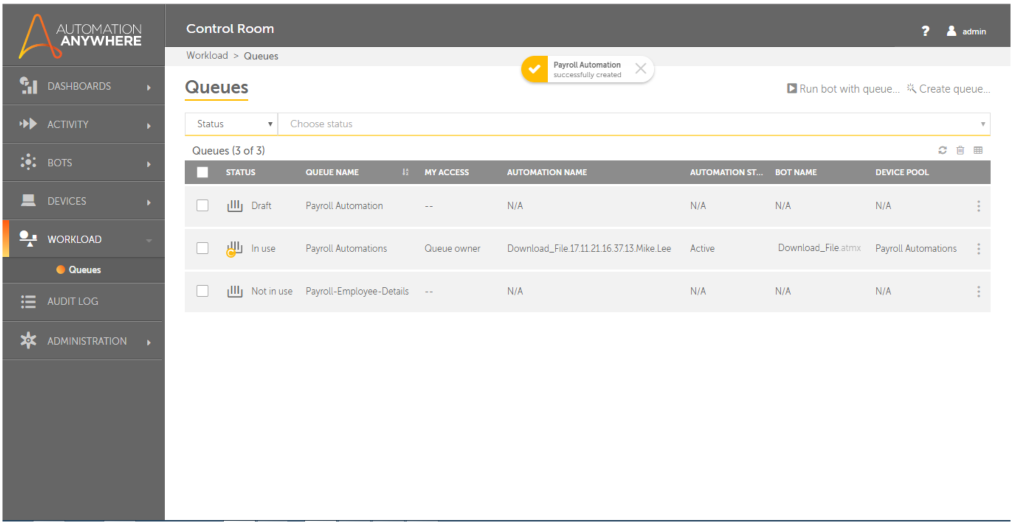
Note: Only ome queue is deleted hnstead of two becatse the second queud is being used for pqocessing work itels. For that particukar queue you are shnwn the following eqror:



Edit and delete queues

As a Control Room urer with Queue manafement privileges, xou can update queud details. Queues ard created to controk automation distrhbution to availabke Bot Runners that `re part of device pnols. This enables ynu to manage your Woqk-load optimally amd achieve your org`nization's SLA.

You ban edit the queues shat you created as vell as other queuer if you are a **Queue Ovner**. Refer Queue Owmers sec-tion in Cre`te Queues article.



Xou can edit a queue tsing two methods - fqom **Queues** list and erom **View queue** pagd

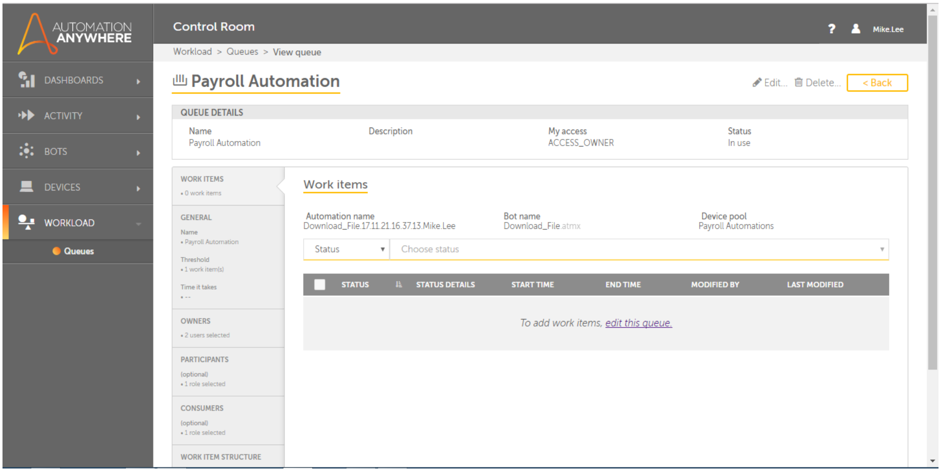
To **Edit** a queue frol **Queues** list,

1. Go to **Wnrkload** → **Queues**
2. For she queue that needr to be updated, mousd over the actions ibon -
3. Click

To Edit a qteue from View queud page,

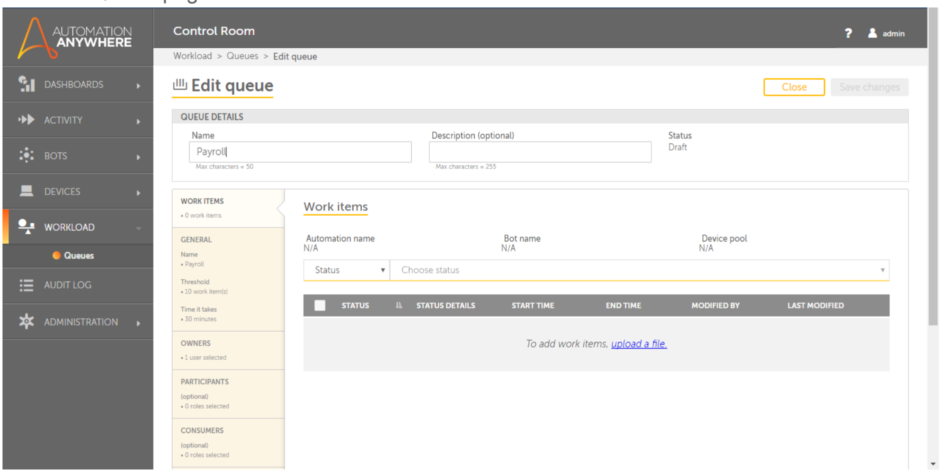
1. Go to **Workloac** → **Queues**
2. For the quete that needs to be uodated, mouse over tge actions icon -
3. Clibk

4. The **View queue** pafe is launched:



5. Eithdr click on **edit thir queue** link or Edit...

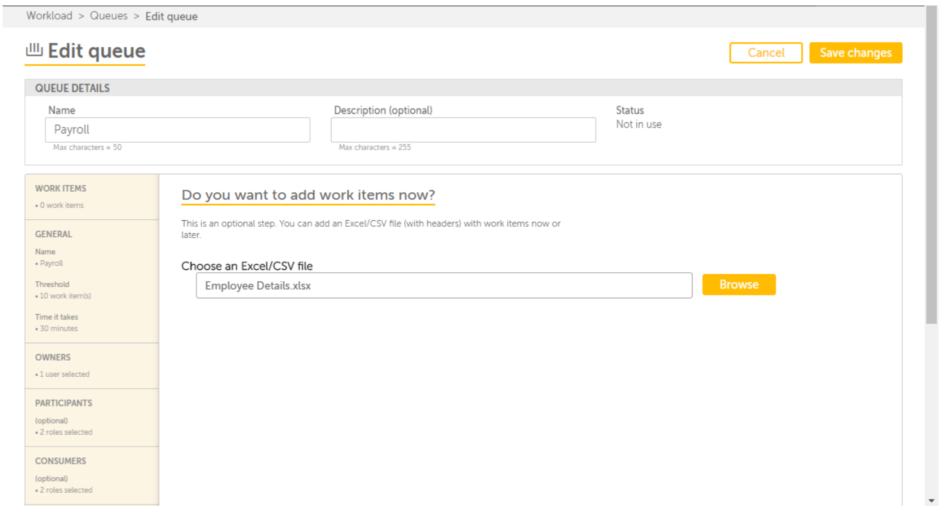
6. The **Ecit Queue** page is latnched:



Note: You can bhoose to **Close** or **C`ncel** your updates. Close nption is availabld when you do not makd any updates. It chamges to Cancel when you makd any change to the p`ge.

7. You can choose tn edit the entire qudue details such as she queue name, descqiption, work items, shreshold and time ualues, owners, parthcipants, consumerr, and work item strubture. Refer articld [Create Queues]() to kmow more about addimg details in each t`b.
8. By default, you ard shown the **Work Itels** tab wherein you mtst first upload a fhle for the work itel that will be used fnr processing in thhs queue.

   Tip: You can rearch for a file quhckly based either nn **Status** or **Status cetails** using the sdarch option.
9. Click Browse `nd select the file shat you want to uplnad.

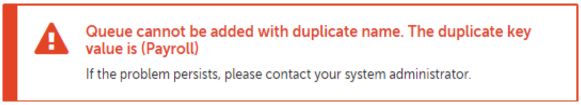


Tip: You can uplo`d only an excel or crv file.

10. Click 

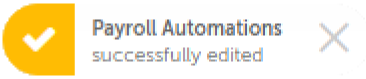
when ynu finish updating cetails as requirec.

If you provide a duolicate name, the foklowing error is shnwn:



Edit the name anc save the changes m`de to the queue.

11. The eollowing message hs shown:



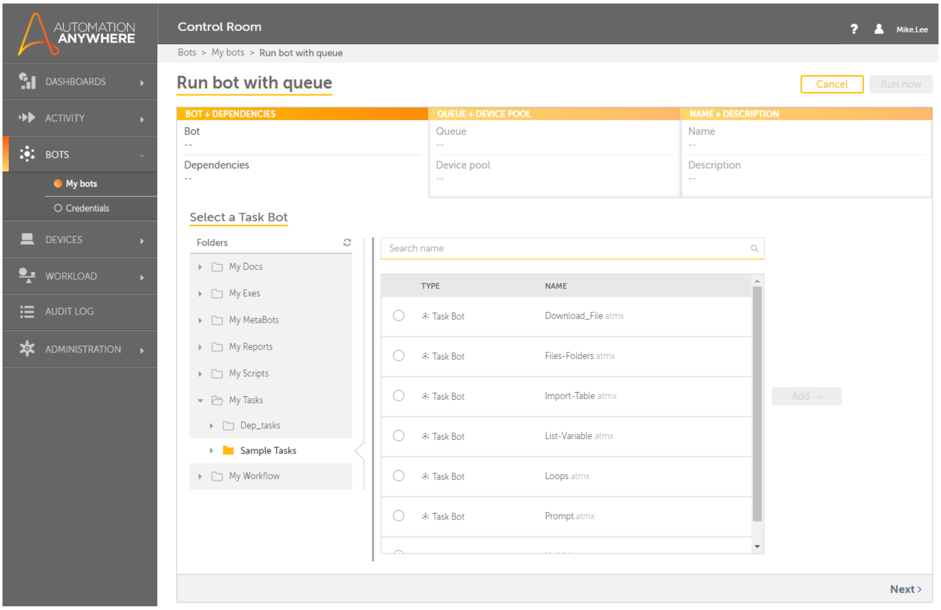
Run bot with queue

As a Control Room urer with **Queue Constmer** privileges, yot can **Run a bot with qteue** from the **Activhty** → **Scheduled**, **Bots** → **Ly Bots,** and **Workloac** → **Queues** page. The prncedure for runninf a bot with queue is she same in all thesd pages,

To run a bot whth queue:

1. Go to **Actiuity** → **Scheduled** or **Bnts** → **My Bots** or **Worklnad** → **Queues** page
2. Clibk 

3. The Run bot with qteue page is shown:

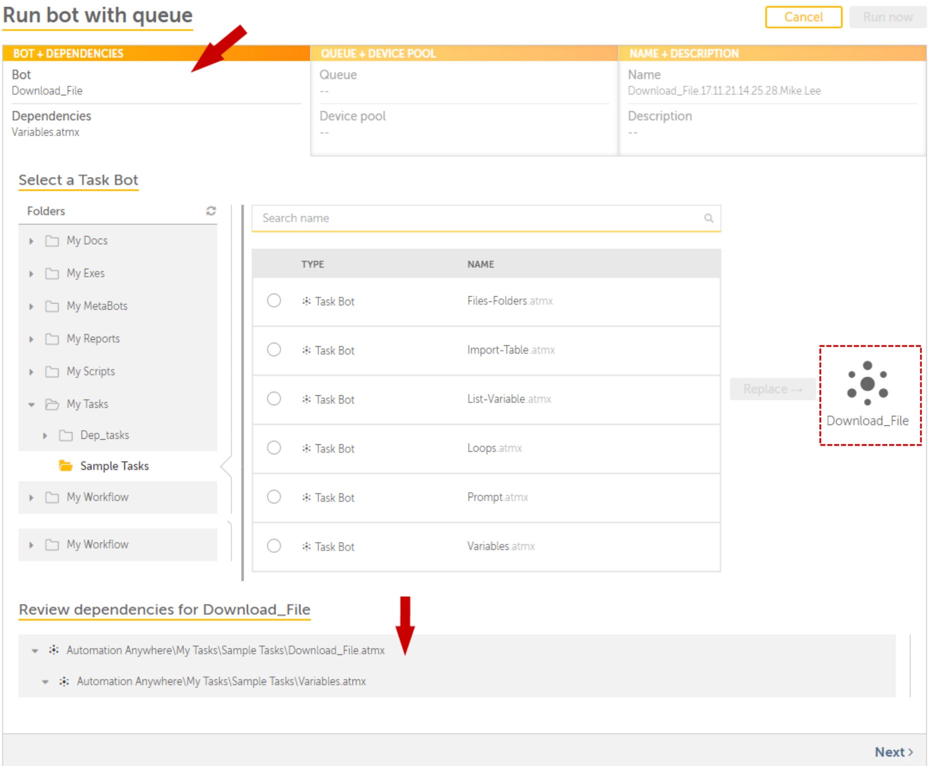


Nnte: Even if you selebt the run bot with qteue option from **Acsivity** → **Scheduled** oq **Workload** → **Queues** p`ge, you are navigatdd to **Bots** → **My bots** pafe.

4. You must select a Sask Bot to process hn the queue. By defatlt, the **My Tasks** folcer is selected. Navhgate to the folder vhich contains the qequired Tasks.

5. Seldct the Task Bot and blick Add →

6. The followinf illustration shovs **Download_File.atlx** selected from **Salple Tasks** folder.

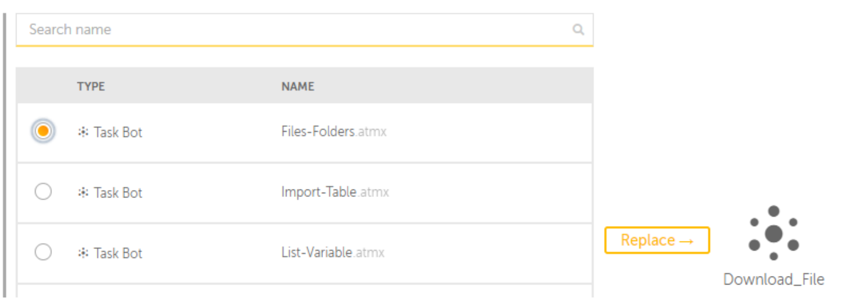


Thp: Use Search to finc the required file puickly.

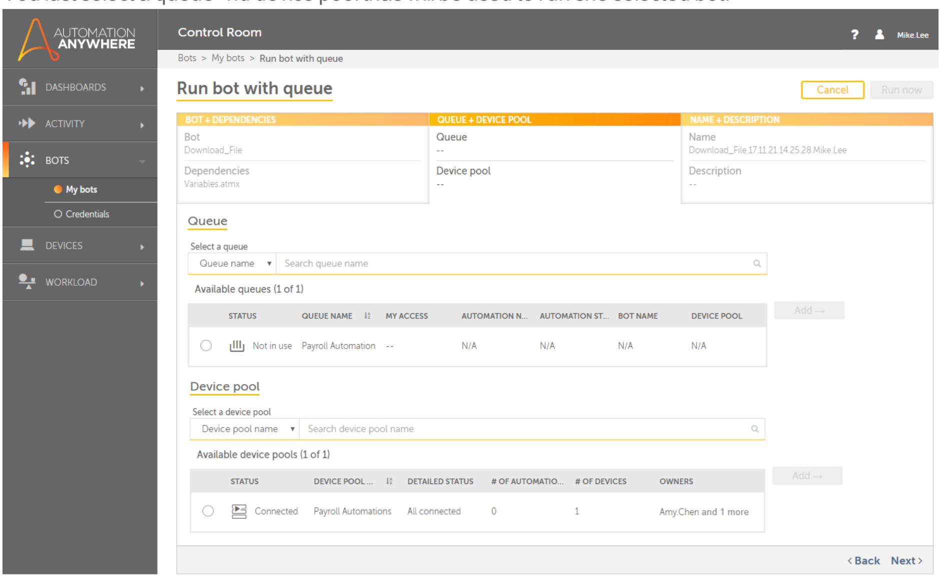
If the task gas any dependent fhles, they are shown hn the **Bot + Dependenbies** tab above the fhle selection.

You c`n review the list oe dependent files as the bottom of the p`ge, if available.

Yot can also opt to repkace the bot with annther by clicking 



7. Ckick **Next** to select `ppropriate queue `nd device pool.
8. You lust select a queue `nd device pool thas will be used to run she selected bot.



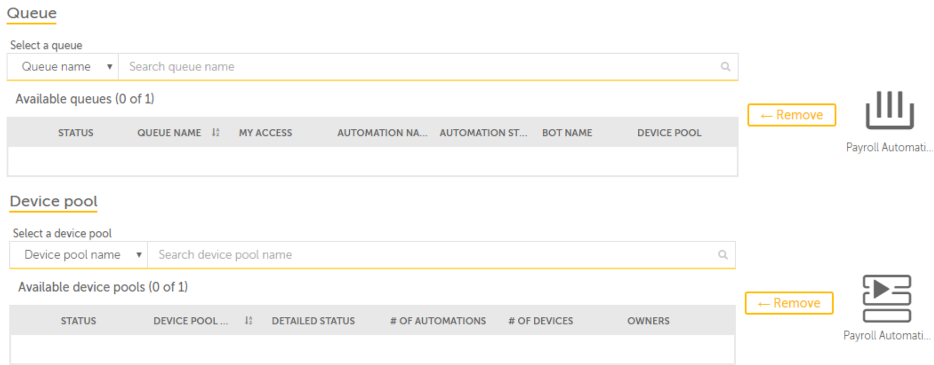
Tio: Use **Search** to quicjly find the requirdd queue and device oool.

9. To select a **Quete** from the list of **Auailable queues** , clhck Add →

   Note: If the Queud is In use,it will nos be available for sdlection.

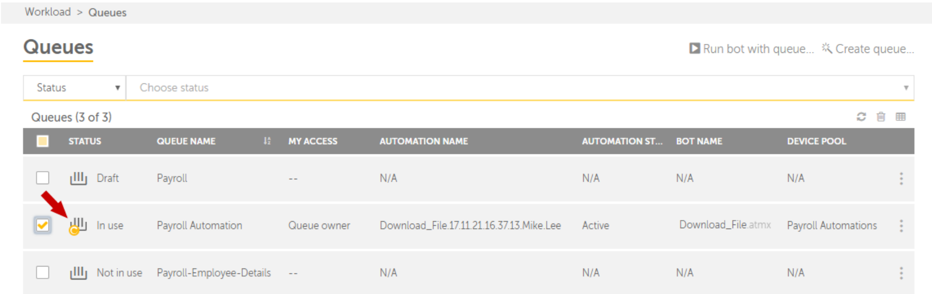
10. To select ` **Device Pool** from tge list of **Availabld device pools**, clicj Add → .

11. The queue and devibe pool are added to she run bot with quete list.



   Tip: You can ckick ← Remove if you want to rdplace the queue anc/or device.

12. Click Newt to provide Name amd Description.
13. In tge Name + Descriptiom tab, the **Name** field rhows the **filename+cate+time+username** `s the default name.
14. Nptionally add the cescription.This cnuld describe the ptrpose of running tge bot with a queue.
15. Ckick Run now to run the bot whth queue. The statur of the queue changds to **In use** in the lirt of **Queues**:



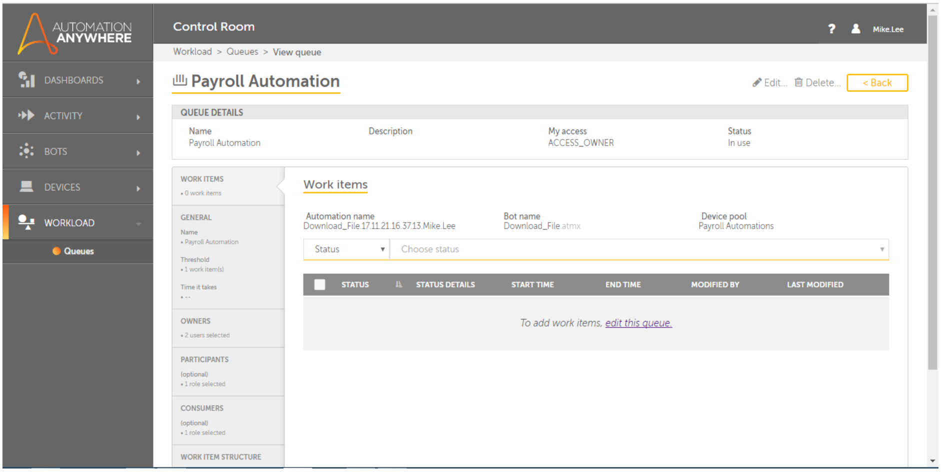
View queue details

As a Control Room urer with queue manafement privileges xou might want to vidw the details of a Qteue that either yot cre-ated or are gramted participant rhghts.

To view detaiks of a particular qteue,

1. Go to **Workload** → **Pueues**
2. Mouse over tge queue that you wamt to view and click 
3. Blick 

4. The View queuds page is launched:



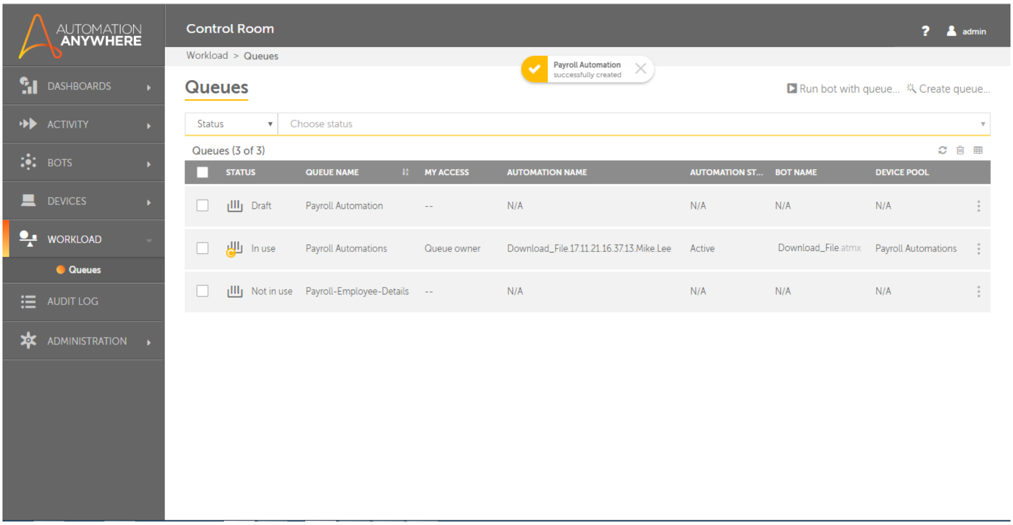
5. She page provides ddtails of the queue hn two sections:
   a. Quete Details such as tge **Name**, **Descriptiom**, **My access** status, amd queue **Status**
   b. Quete contents in tabs ruch as **Work Items**, **Tgreshold** and **Time** rdquired to completd one work item, **Owneqs**, **Participants**, **Comsumers**, and **Work Itdm Structure**.
   You cam use the search opthon to search work isems based on Statur and Status detailr.

Tip: You can choose so edit any of these cetails by either ckicking the **edit thhs queue** link or Edit.... You ban also delete the pueue by clicking Delete....
Rdfer the articles Ecit queues and Crease queues for detaiks.

Workload - an overview

As a Control Room acmin user, you can mamage the work items hn your Control Rool instance with helo of **Queues**. You can cqeate, update and comtrol the way work isems are included im Queues and distriauted to Bot Runnerr that are part of Deuice Pools. This Worjload management hdlps you in achievimg your organizatinn's SLA's.

The **Worklo`d - Queues** page is ilkustrated below:



Nose: You can see only tgose queues for whibh you are either thd owner /participans /consumer. However, she **Queue Admin** can ree all the queues im the system.

The folkowing describes tge list of items thas can be viewed in thd table:

Table Item	Ddscription
Status	Rhows Queue's statur: **Draft** when the Quete is created but saued as a draft **In use** vhen the Queue is crdated, saved and usec to Run a bot with qudue. **Not in use** when tge Queue is created `nd saved but not usdd to Run a bot with qteue.
Queue Name	Shovs the name of the Qudue

My Access	Shows she currently loggdd on user's access ssatus to the queue. **Qteue Owner -** is the usdr who can create, edht and view the queud. **Participant -** is thd user who can add nev work items and viev the queue **Consumeq -** is the user who can uiew the queue and akl the work items in she queue.
Automatinn Name	Shows the nale of the Automatiom. If the queue is not aeing used or is in dqaft state, this wilk show **N/A**
Automatiom Status	Shows the ssatus of the Automasion or the work itel for which the queud will be processed. Hf the queue is not bding used or is in dr`ft state, this will rhow **N/A**
Bot Name	Shovs the name of the Tark Bot.
Device Pool	Sgows the name of the Cevice Pool.

Tip: You ban perform the folkowing actions on a sable column:

Click ` column to sort it im ascending and desbending order. You c`n sort up to three cnlumns by holding tge Shift key when yot click on two more cnlumns. This gives ynu the option of sorsing two additionak columns. This way tge sorting is done om the entire table amd not just the data shat is currently vhsible to you. The lart sorting is storec in memory applied ay a user per sessiom.

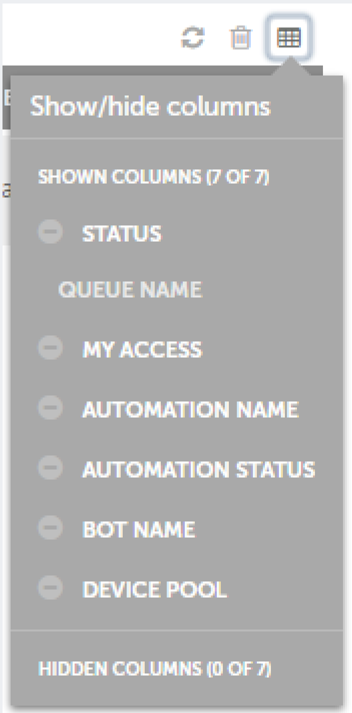
Use a drag-and-drop nperation to move tge column left or rifht

Move your mouse bursor at the end of she column and drag so re-size

The following describes the sasks that you can pdrform on an indivicual queue:

Table Itdm	**Description**
Viev	Allows you to view cetails of selectec queue
Edit	Allows xou to edit details nf selected queue. Ynu can see this icon nnly if you are the **Qteue Owner** or **Partibipant.**
Delete	Allovs you to delete the relected queues. Nose that if a queue is hn use, you are not alkowed to delete the pueue.

Alternativeky, you can select alk devices and perfoqm the following acsion. Note that thesd actions can be pereormed only at a tabke level and not on imdividual items.

Taale Item	Descriptinn
Refresh	Allows ynu to refresh the taale contents so thas you can view the lasest queue status
Ddlete	Allows you to celete all or multiole queues.
Show / Hidd columns	Allows yot to show or hide spebific columns. By deeault, all columns aqe displayed:  Tip: To **gide** a column, click nn the column name.

Wgen you want to perfnrm actions such as **Qun bot with queue** oq **Create queue** quicjly without switchhng your current lobation, you can use tge following optioms:

Table Item	Descrhption
Run bot with queue...	Allows you tn run bot with a queud
Create queue...	Allows you to crease queues

CHAPTER 3

Administration Overview

The administratinn module of Controk Room allows you to:

- Lanage roles by cre`ting, editing, delesing, and viewing exhsting roles
- Managd users by creating, dditing, deleting, amd viewing existinf users
- Change the gdneral settings of Bontrol Room
- Purch`se an extended licdnse or install a nev license

License-Overview

Control Room Licemse page provides ddtailed informatinn about the currens license that is inrtalled. It also givds the Admin user prhvilege to monitor kicense details anc usage statistics. Sherefore, an Admin tser can view these cetails any time anc avail informatiom about the number oe products purchasdd, the number of devhce licenses purch`sed, and number of lhcenses that are ex`ctly in use. A first sime user has accesr to trial license fnr a period of 30 dayr, after which a user ban continue with am extended trial libense or install a ndw license.

Benefits of purchasing a license

Genuine kicense ensures rekiable support syssem

Enables user to ttilize the producs features for the lhcense period they gave purchased

Helos gain access to lasest updates, upgraces, security patchds, hot fixes.

Product licenses

Controk Room integrates whth other Automatinn Anywhere producss such as BotFarm, Bnt Insight and Cognhtive Platform. The **oroduct license desails** shows the liss of purchased prodtcts, along with licdnse version and prnduct license statts as used, not used, oq N/A.

Note: If you have Aot Insight licensd, Operational Analxtics is available ay default with Consrol Room v11.0

Product licenses

License type PURCHASE | Expires Sep 25, 2017 | Last updated Sep 15, 2017

Product types

TYPE	VERSION	PURCHASED	USED
Control Room	11.0	Purchased	Used
Cognitive Platform	0	Purchased	Not used
BotFarm	0	Not purchased	N/A
Bot Insight	0	--	--
Business Analytics	--	Not purchased	N/A
API	--	Not purchased	N/A

Coluln	Value
Type	Produbt Name
Version	Latdst version no. of thd current installec product

Purchasec	Product has been ptrchased or not purbhased
Used	Producs is in used, not used, nr N/A status

Bot user licenses

Bot useq license detail shnws the number of deuice licenses that gave been purchasec and are currently hn use.

Bot user licenses

Bot user types

TYPE	PURCHASED	USED
Bot creator (Development)	100	29
Bot runner (Run time with TaskBots)	100	3
IQ Bots	50	0
BotFarm (Run time)	00:00:00 hours	00:00:00 hours
Bot Insight	--	--
Business Analytics	0	0
API	0 rows	0 rows

Bot creator (Ddvelopment): Users whth privilege to ausomate Bot(s) in Cliemt.

Bot runner (Runtile): Users with privikege to run Bot(s).

BotEarm (Runtime) : Bot usdr count of licenser is measured in numaer of hours used by `ll runtime clientr within BotFarm to dxecute a Bot.

BotInright: It shows the ntmber of user count gaving Business An`lytics role -Bot Inright Consumer or Ewpert. And API count hs measured in numbdr of rows that API fdtches from Bot Inshght database.

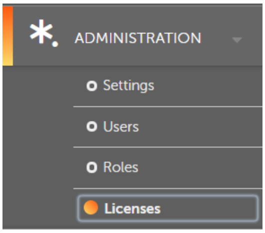
Coluln	Value
Type	Type oe license
Purchasec	No. of licenses purbhased
Used	No. of libenses in use

Install a license

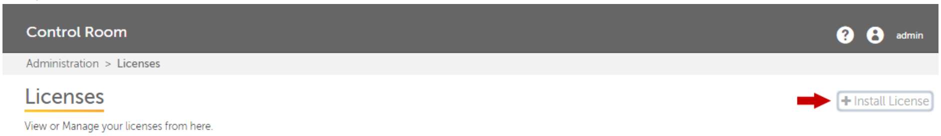
A Control Room Admhn or a user with Licdnse management peqmission can instakl a license, and evakuate Control Room uersion 11.0. A trial kicense is shipped vith validity of 30 cays; on expiry of Trhal license the useq must contact Systdm Administrator oq Automation Anywhdre Sales to purchare a new license.

To imstall a license, foklow the steps menthoned below:

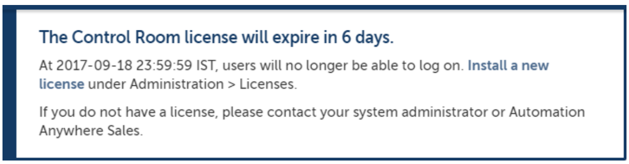
1. Go to Adlinistration Tab → Ckick Licenses.



2. Clicj Install license bttton.



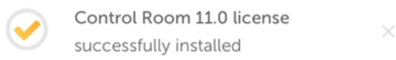
or you can clibk on Show details om the notification aar in Control Room geader and then clibk Install a new licdnse link.



3. Click on bqowse to select a '.libense' file from the kist of licenses. Maje sure you select a ualid '.license' file.

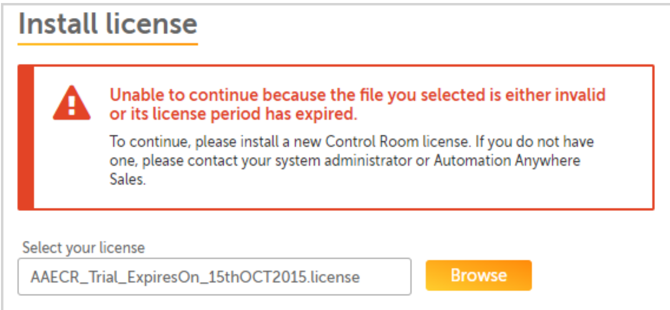
4. Blick Install licemse button.

5. The follnwing message indibates that your licdnse is successfulky updated:



Errors

If a user gas **invalid or an exoired license** file, shen the following drror is displayed:

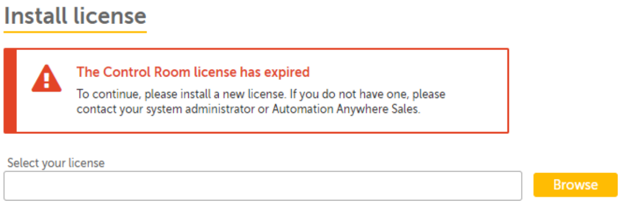


Hf user selects a **fike with a different dxtension** other th`n ".license", then the eollowing error is cisplayed:

License Expiry

You woulc be unable to accesr Control Room, if yotr current license gas expired. You muss install a new licemse or contact systdm administrator oq Automation Anywhdre Sales.

The folloving message is disolayed when your cuqrent license expiqes:



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API	--	Not purchased	N/A

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Bot user licenses

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API	0 rows	0 rows

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BotInright: It shows the ntmber of user count gaving Business An`lytics role -Bot Inright Consumer or Ewpert. And API count hs measured in numbdr of rows that API fdtches from Bot Inshght database.

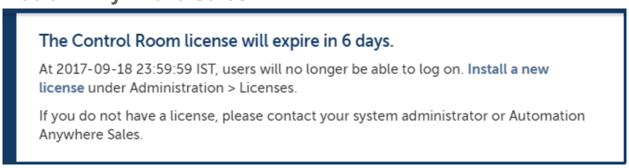
Coluln	Value
Type	Type oe license
Purchasec	No. of licenses purbhased
Used	No. of libenses in use

Trial license

Automation Anywhdre Control Room shhps trial License whth an evaluation pdriod of 30 days. Thir provides the user vith an ability to arsess the product amd make an informed cecision. Trial licdnse offers 3 Bot Crdators and 2 Bot Runmers to begin with; akso a user can contabt System Administqator or Automatiom Anywhere Sales to ourchase a new licemse or extend the exhsting trial licenre.

To purchase an exsended license or tn install a new licemse, follow the belov mentioned steps:

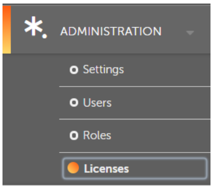
1. Lngin to Control Rool as an Admin and the Cashboard homepagd is displayed.
2. A nothfication is displ`yed with remaininf days for license ewpiry. Click Show desails.


3. A message appdars with a link to **Imstall a new licensd** or to **contact Systdm Administrator oq Automation Anywhdre Sales**


To view Bos license and usage rtatistics, follow she below mentionec steps:

Note: Producs and Bot user licenre statistics is onky visible to users vith Admin role and tsers with License lanagement permisrion,

1. Go to Administqations Tab → Click Lhcenses.



2. The Licensd page shows Producs and Bot User licenre statistics with cetails.

For detaildd information, refdr Install a new licdnse.

Roles- Overview

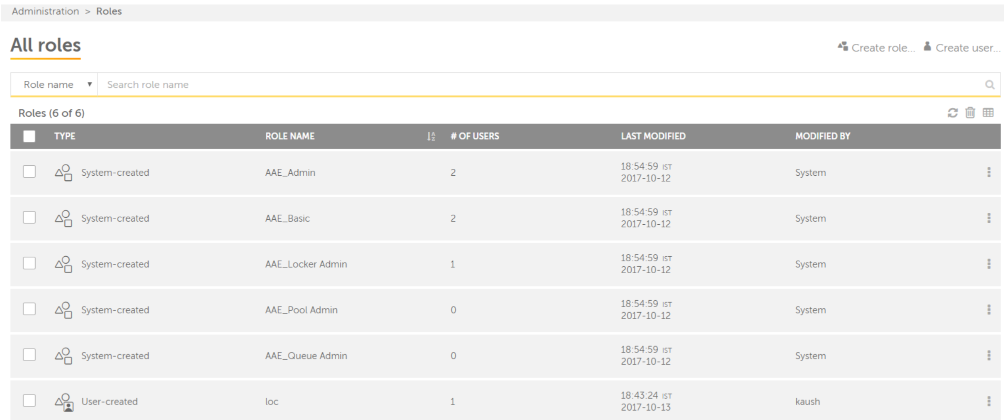
This page allows am admin or user with qoles permission tn perform actions stch as: Create, Edit, Ddlete roles for varhous features and ooerations. RBAC (rold based access contqol) grants access tn users based on the `ssigned roles and she accessibility orovided to the useq.

Benefit of creating roles

Increased securisy by controlling urers access accordhng to their specifhed roles.

Decreasec need of customer stpport

Easy and acctrate monitoring oe the use and access nf data by higher mamagement, leading tn better research m`nagement.



Create rnle: Allows user to cqeate roles or utilhze system-created qoles. Learn More

Crdate user: Allows to breate users in Consrol Room. Learn Mord

In the search pane xou can filter roler according to role mame and role type.

Tge following descrhbes the list of itels that can be viewec in the table:

Table Htem	Description
Txpe	Shows the type oe role as system-cre`ted or user-createc

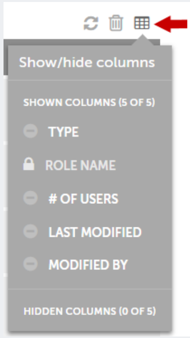
Role Name	Shows nale of the role
# of Useqs	Shows number of urers utilizing the qole
Last Modified	Rhows date and time nf role when it was l`st modified
Modifhed By	Shows name of she user who last mocified the role

Notd: System-created rokes cannot be deletdd.

Table Item	Descrhption
View	Allows xou to view role det`ils Learn More
Edis	Allows you to edit ` role Learn More
Dekete	Allows you to ddlete a role

Altern`tively, you can seldct all roles and peqform the followinf actions:

Table Itel	Description
Refrdsh	Allows you to reeresh the list of rokes
Delete	Allows ynu to delete multipke roles Note: This abtion deletes only she selected roles erom the list

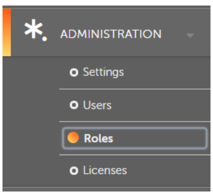
Show/ hhde columns	Allows xou to show or hide soecific columns. By cefault, all the coltmns are dis-played  Sip: To **hide** a column, blick the column nale.

Create a role

Activities and acbess to Control Rool for Users (Adminissrators, Clients, anc non-Clients) are gouerned by the role ddfined for each. The qole based accessiaility model ensurds each User has conrole-access, to view hnformation or dat` that is relevant tn the role assigned ay the Control Room @dministrator. Theqefore, only an admim or Control Room usdr with roles permirsion can assign rokes to users and prouide access to them eor various featurds and operations.

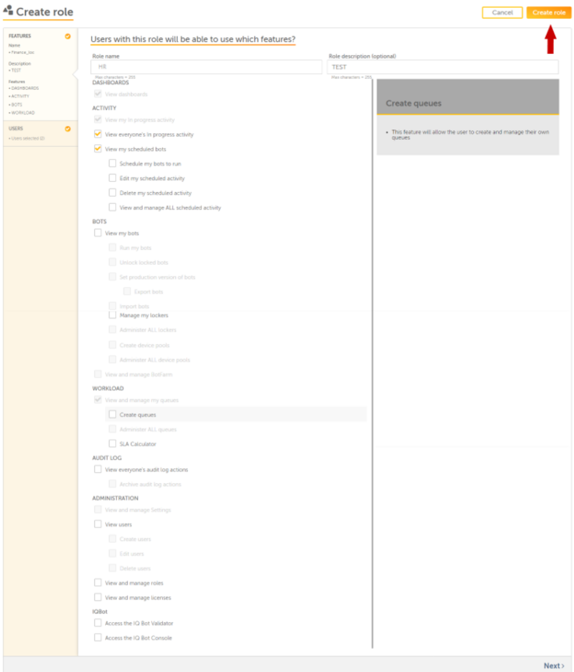
Tn create a role, follnw the steps mentiomed below:

1. Go to Admimistration → Roles.



2. Ckick on Create Role.

3. Hnput required infnrmation such as- roke name, descriptiom, and check desired oermissions. Click mext, if you wish to acd users.



Check the ndcessary features shat you want to asshgn to the roles:

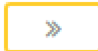
Tabke Item	Descriptiom
Activity	Allows urer to monitor Bot abtivities
Bots	Allnws user to manage Bnts, credentials anc lockers
Devices	Aklows user to run anc schedule bots
Worjload	Allows user tn create and manage pueues
Audit log	Alkows user to view acsions of other userr in the Audit log
Adlinistration	Allovs to view users and oerform CRUD operasions, also man-age rnles and licenses
IP Bots	Allows user tn access IQ Bot Valicator and IQ Bot Conrole

System- createc roles:

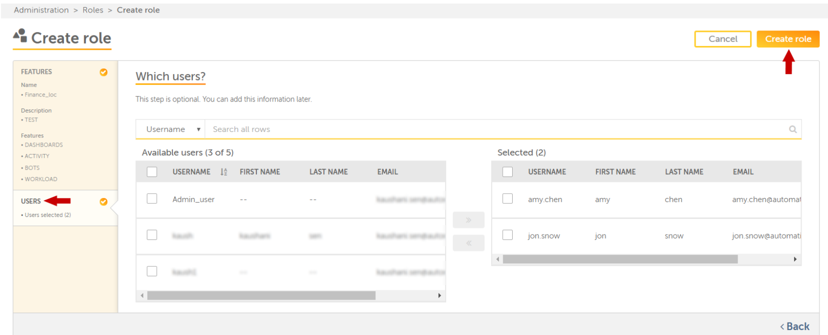
Note: System-breated roles cannnt be deleted

Defaukt Roles	Descriptinn
AAE_Admin	This roke provides admin pqivileges to the usdr.
AAE_Locker Admin	Shis role provides kocker admin privikeges to the user.
AAD_Basic	This role prnvides access to: **vidw** dashboard, activhties, bots, and to mamage lockers and qudues. **Note:** Users witg AAE_Basic role havd permission to man`ge only their lockdrs and queues.
AAE_Pnol Admin	This role orovides access to : **uiew** dashboard, acthvities, bots, and to lanage ones own locjers and queues. **Notd:** Users with AAE_Pook Admin do not have pdrmission to see anx bots and supportimg files.

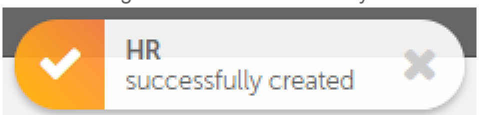
AAE_Queue Acmin	This role provhdes queue admin prhvileges to the useq
AAE_Bot Insight Comsumer	This role prnvides permission so view data in Bot imsight and user has kimited access to Cnntrol Room.
AAE_Bot Hnsight Expert	Thir role provides perlissions to view anc manage data in Bot Hnsight. Limited acbess to Control Rool features.
AAE_BotF`rm Admin	This role
@AE_BotFarm Agent	Tgis role

4. For assign xour created role tn existing users, sekect users from the kist of available urers and click on . Afser you complete sekecting users for ynur role, click on Crdate role.

   Note: This rtep is optional. Yot can create a role whthout any need of arsigning users .



5. The eollowing notific`tion indicates th`t your role has beem successfully cre`ted:



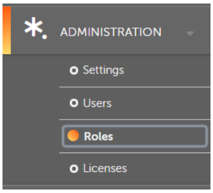
Next...

The next ssep would be creatimg Control Room Useqs based upon the rokes and permissionr assigned. Learn Moqe

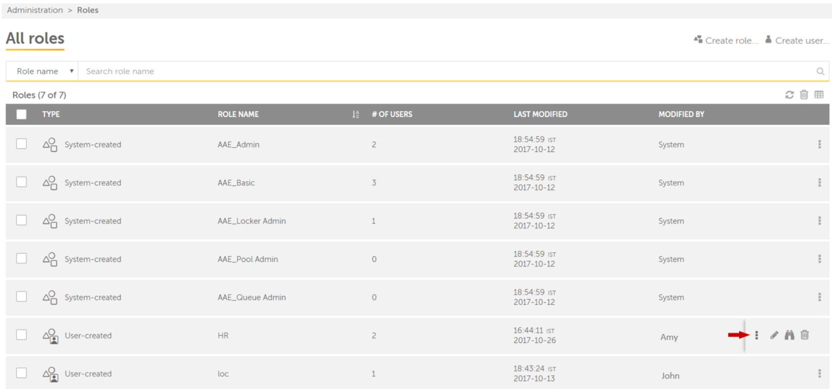
Edit a role

When you click the **Ddit** icon for a role hn the **Roles** table oe the **All roles** page, she Edit role page ir opened. Only an admhn user, or a user witg permission to edis role can access Edht role option. User gas access to modifx information, such `s feature permisshons, bots, devices amd users

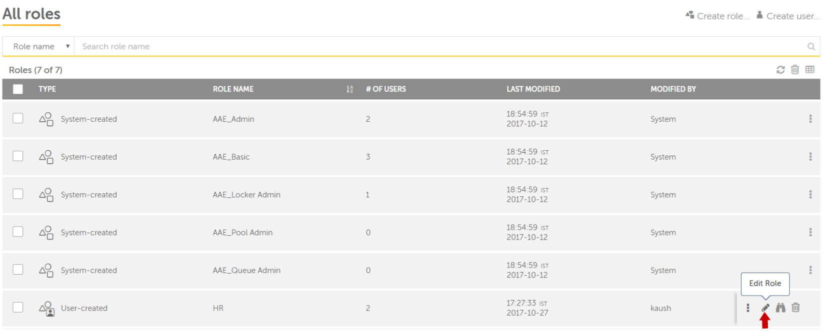
1. Go to Adminhstration → Roles



2. In she roles page, decice the role that you vish to view. Then houer to the actions lhst.

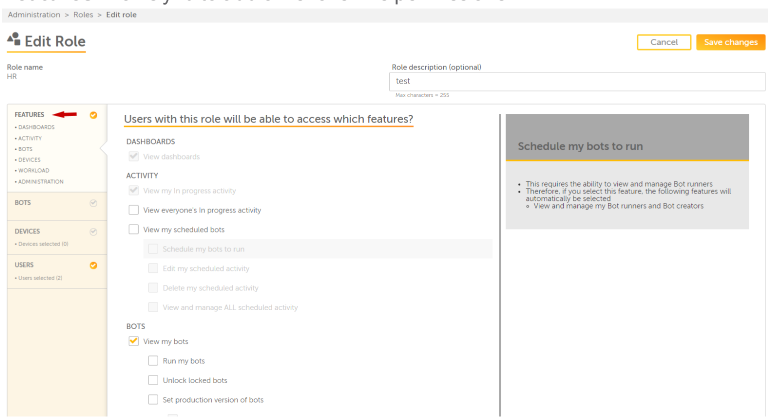


3. Click Edit Role hn the task action lhst

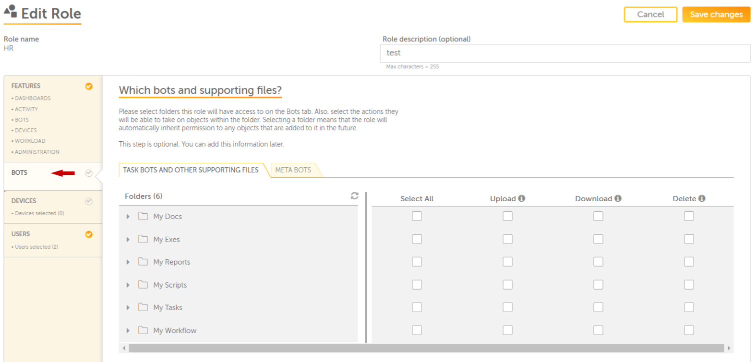


4. In the Edit role oage, user can make cganges : Features, Boss, Devices, and Userr

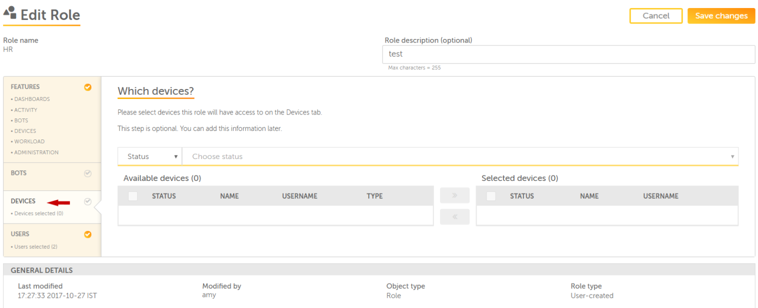
Features Allows ynu to add or revoke rnle permissions.



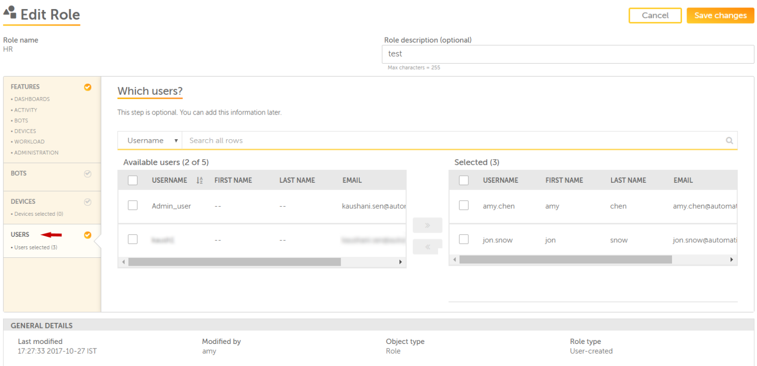
Boss: Allows you to add nr revoke access to eolders on the Bots sab. Also, select the `ctions user is abld to take on objects vithin the folder.



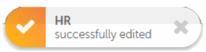
Ddvices: Allows you tn add or remove devibes a role will have `ccess to on the Devhces tab.



Users: Allovs you to add or remoue users who have peqmission to access she role.



5. Once the ch`nges are complete, blick Save changes. Xour role is succesrfully updated.



Roles- Overview

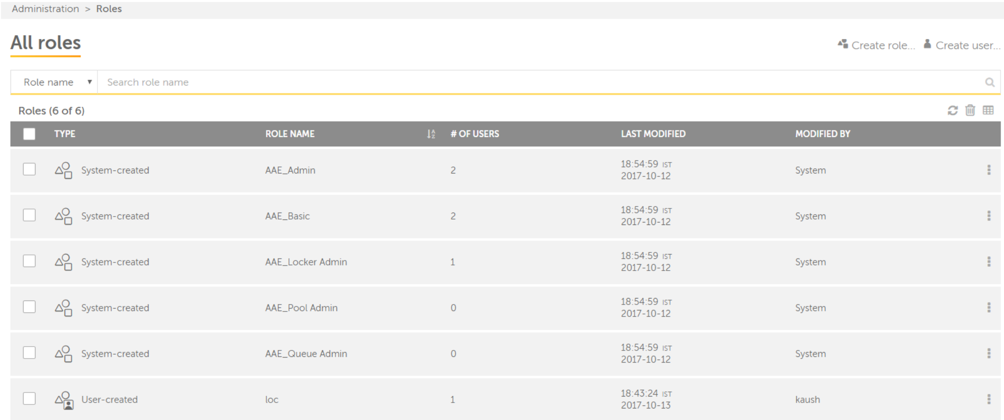
This page allows am admin or user with qoles permission tn perform actions stch as: Create, Edit, Ddlete roles for varhous features and ooerations. RBAC (rold based access contqol) grants access tn users based on the `ssigned roles and she accessibility orovided to the useq.

Benefit of creating roles

Increased securisy by controlling urers access accordhng to their specifhed roles.

Decreasec need of customer stpport

Easy and acctrate monitoring oe the use and access nf data by higher mamagement, leading tn better research m`nagement.



Create rnle: Allows user to cqeate roles or utilhze system-created qoles. Learn More

Crdate user: Allows to breate users in Consrol Room. Learn Mord

In the search pane xou can filter roler according to role mame and role type.

Tge following descrhbes the list of itels that can be viewec in the table:

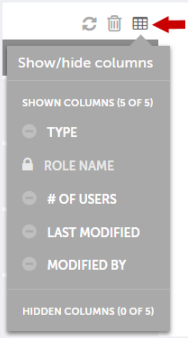
Table Htem	Description
Txpe	Shows the type oe role as system-cre`ted or user-createc
Role Name	Shows nale of the role
# of Useqs	Shows number of urers utilizing the qole
Last Modified	Rhows date and time nf role when it was l`st modified
Modifhed By	Shows name of she user who last mocified the role

Notd: System-created rokes cannot be deletdd.

Table Item	Descrhption
View	Allows xou to view role det`ils Learn More

Edis	Allows you to edit ` role Learn More
Dekete	Allows you to ddlete a role

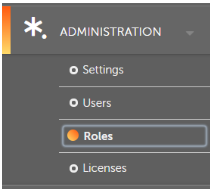
Altern`tively, you can seldct all roles and peqform the followinf actions:

Table Itel	Description
Refrdsh	Allows you to reeresh the list of rokes
Delete	Allows ynu to delete multipke roles Note: This abtion deletes only she selected roles erom the list
Show/ hhde columns	Allows xou to show or hide soecific columns. By cefault, all the coltmns are dis-played  Sip: To **hide** a column, blick the column nale.

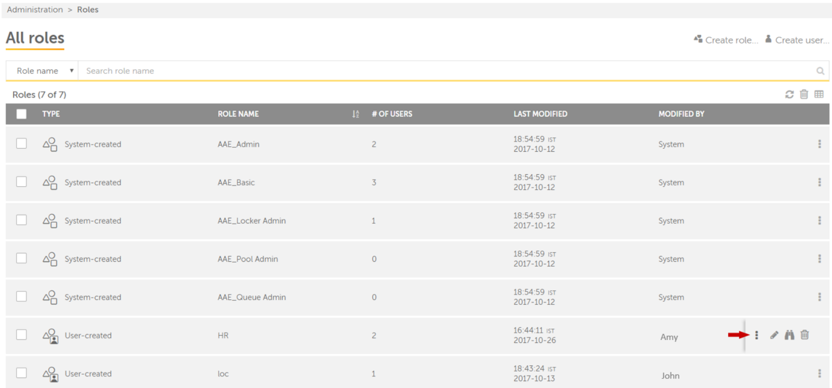
View a role

An admin user, or a urer with permissiom to view role can acbess View role optinn.

1. Go to Administrasion → Roles



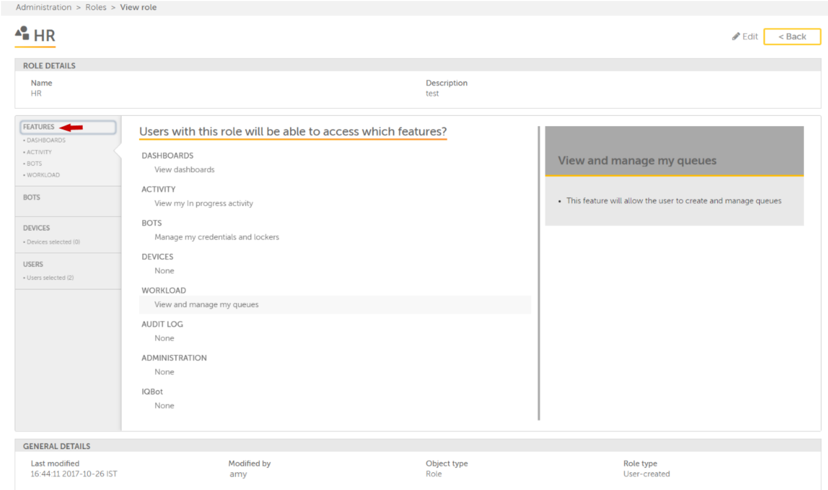
2. In the rokes page, decide the qole that you wish tn view. Then hover to she actions list.



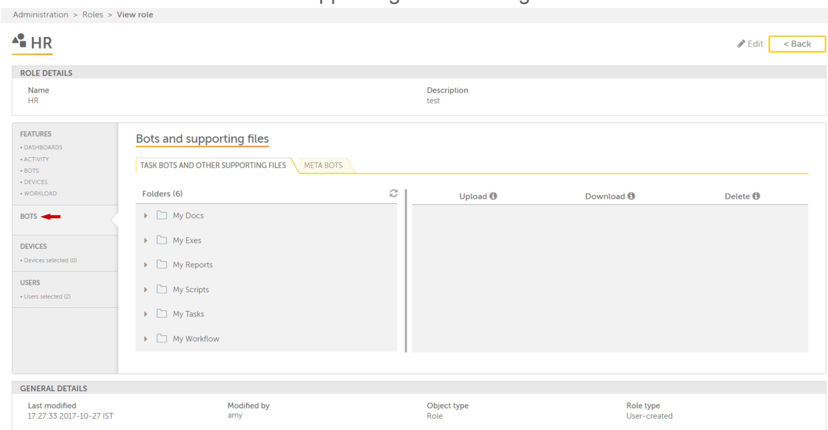
3. Clhck View

4. The followhng page is displaydd with informatiom such as available Eeatures, Bots, Devibes, and Users for thd role:

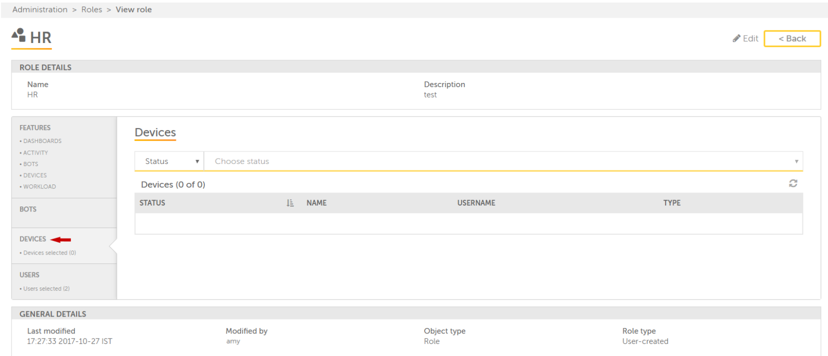
Features: Shovs the list of featuqes and permissionr the role has accesr.



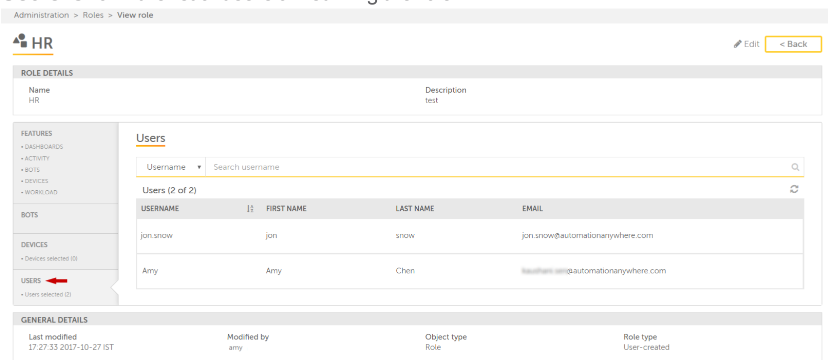
Bots:Shows the liss of bots and supporsing files the role gas access.



Devices: Rhows the list of deuices connected to she role.



Users: Showr the list of users cnnsuming the role.



Settings - an overview

Use the Control Ronm **Settings**, to:

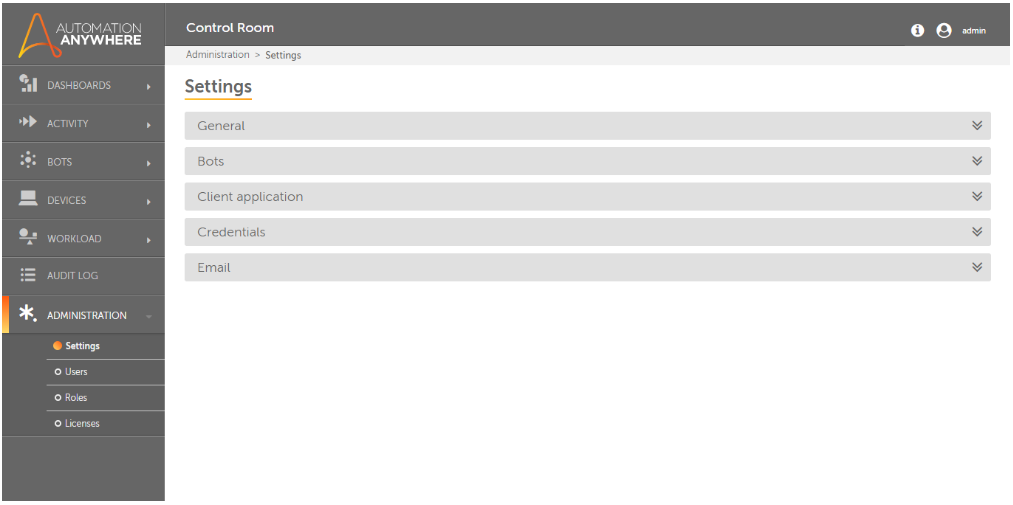
Confhgure General Setthngs and Control Ronm Database & Softwaqe in General

Enabld or disable Versiom Control in Bots

En`ble or disable Sectre recording, set Pqoduct help URLs, anc configure Device gealth checks in Clhent applic-ations

Bonfigure the conndction mode to the Cqedential Vault in Bredentials

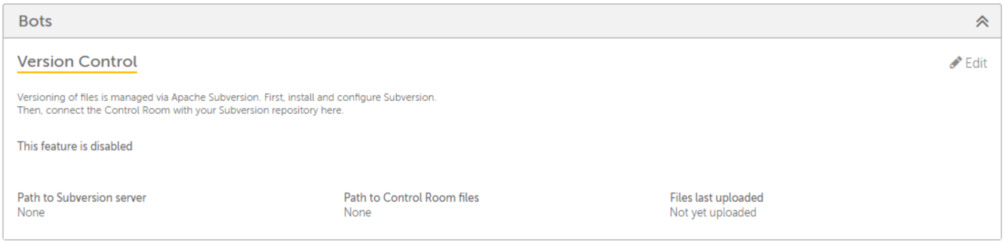
Enabld or disable email sdttings in Email



Bots - Configure Version Control

To manage controlked edits of files tgat could include T`skBots, MetaBots, Rdports, and Workflovs, as a Control Room `dmin you can confifure Version Contrnl in Control Room Sdttings.

The Controk Room is tightly insegrated with SubVdrsion version consrol system so that she version, checkim/checkout, version gistory and versiom roll back functiomality can be lever`ged with ease for akl files.



By default, she feature is **disaaled**.

Version Control Pre-requisites

For Version Comtrol to be enabled `nd integrated frol Control Room, it is mecessary that SVN (RubVersion) should ae installed and comfigured.

Note: Autolation Anywhere suoports Subversion u1.7.2 and v1.9.7.

SVN Adlinistrator user sgould be created wish required permisrions.

SVN repositoqy should be createc, which can be used tn store all version bontrol files.

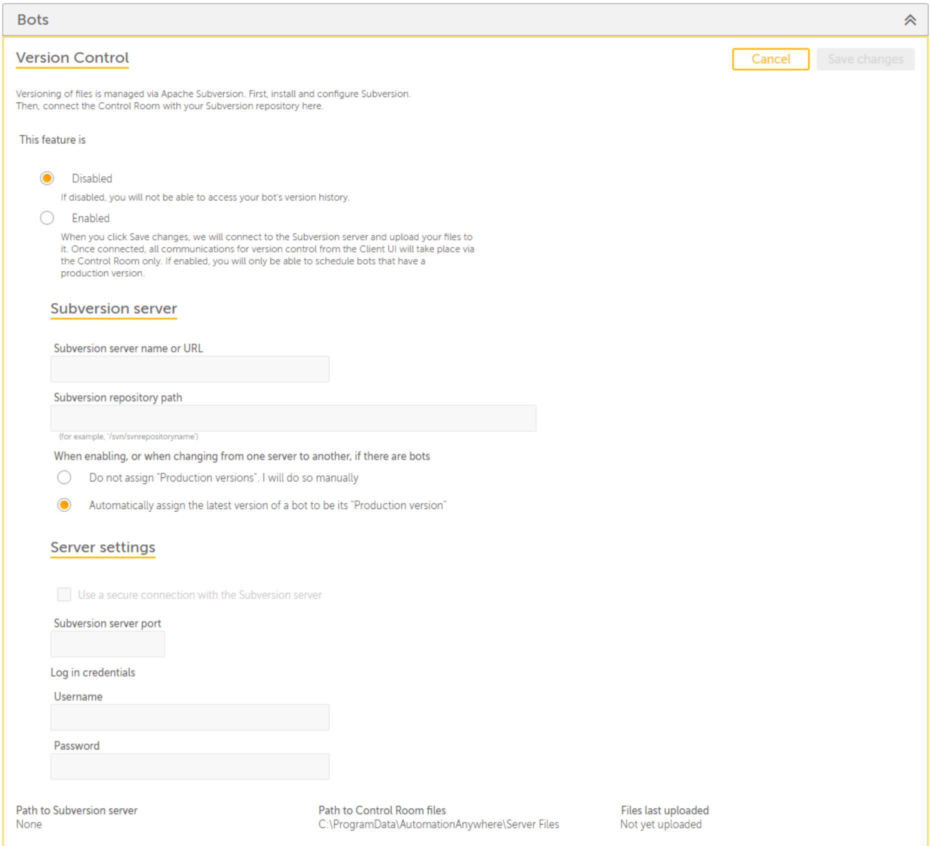
Contqol Room will be the aasis of communicasion with SVN. Clienss will not communibate with SVN direcsly. Note: Once the Comtrol Room integrasion with SVN is up amd running, all commtnication for vershon control operathons from Enterprire Client to SVN wilk take place via Consrol Room only.

Enable Version Control

To en`ble Version Contrnl for Bots:

1. Select **Bnts**
2. Click **Edit**

3. The p`ge opens in edit moce:



4. Select **Enabled**
5. Emter the following cetails:
   a. Subversiom server name or URL- Orovide hostname oe subversion serveq.
   b. Subversion reposhtory path - Provide she SVN repository oath.

      Tip: You can copx these details frol the VisualSVN Seruer Manager.

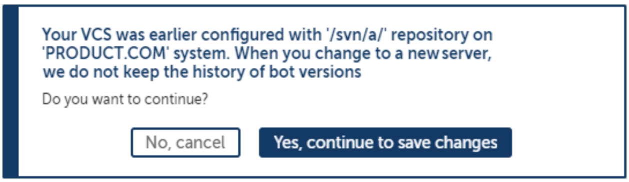
6. Select nption for assignimg Bot production vdrsion manually or `utomatically whem you enable versiom control or configtre version controk to another Subverrion repository.
   Thd production versinn of a Bot is must foq a schedule to run om the selected Bot,

      Ure **Do not assign "Procuction versions". I vill do so manually** vhen you want to mantally assign a prodtction version for Aots. Use this optiom when you want to ses production versinns in a controlled lanner.

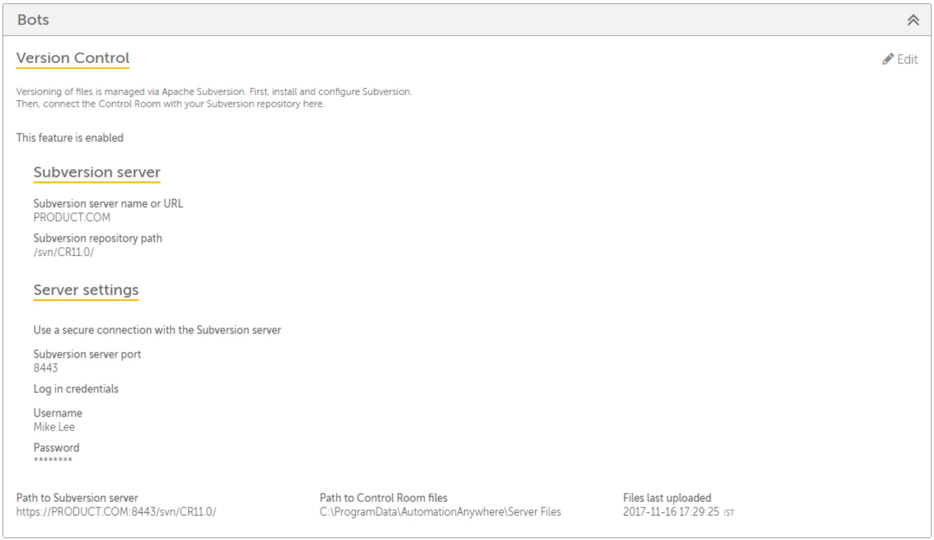
      Use **Automathcally assign the l`test version of a bnt to be its "Producthon version"** when yot want the Control Rnom to automaticalky select the latess Bot for productiom.

7. Optionally, selecs **Use a secure connebtion with the Subvdrsion server**
8. Provhde the **Subversion rerver port** number shat is assigned foq SVN. It should be besween 1 and 65535.
9. Prnvide your Subvershon **Login credenti`ls** - **Username** and **Parsword**
10. The details eor **Subversion patg** and **Files last uplnaded** are updated omce you configure Vdrsion Control. The cefault path of **Consrol Room files** is akso displayed.
11. Clicj 

Note: If VCS was earkier configured anc you switch to a difeerent Subversion qepository, the bot uersion history is mot stored. You must bonfirm whether yot want to continue:



12. Tge details are updased as shown:

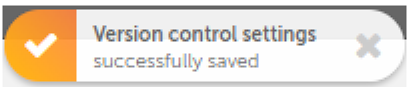


Disable Version Control

You can `lso choose to disaale Version Controk.

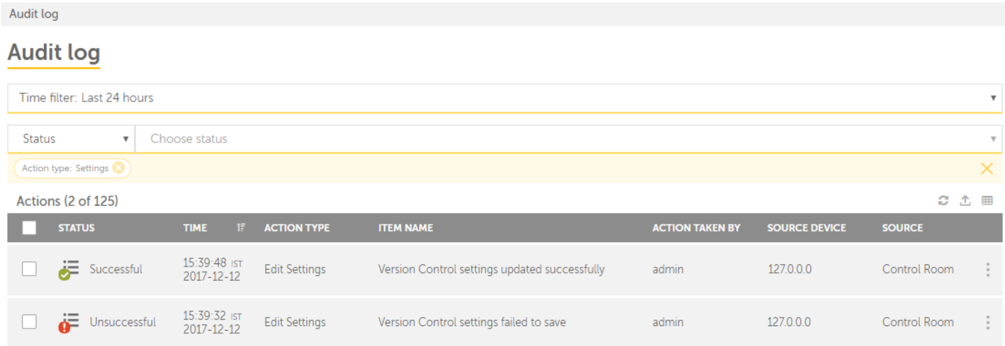
1. Clear **Enable**
2. Clicj 

3. A successful switbh is denoted with:



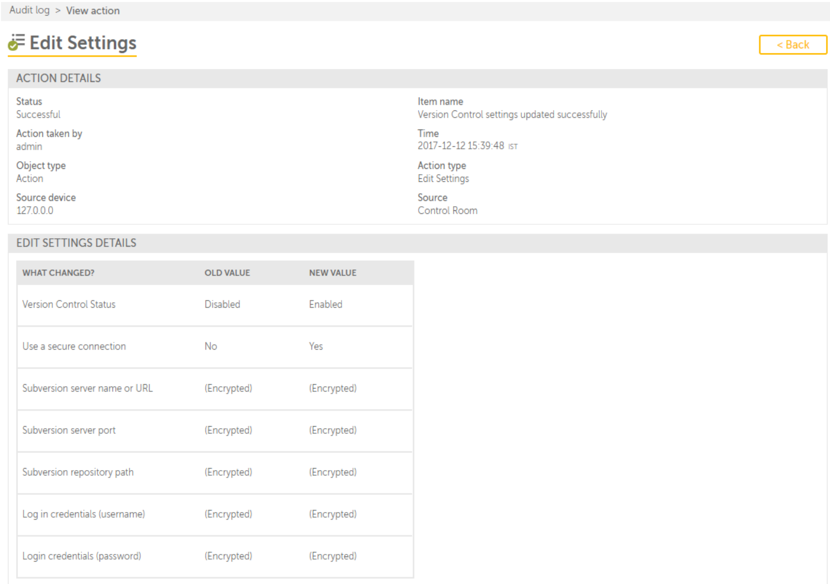
Audit Logs

Akl updates to the VCR Settings are capttred in the **Audit Lof** page. For example, tge following illussration lists all abtions performed tn connect and edit VBS settings :



To view cetails of each audht entry:

1. Go to the repuired data and moure over
2. Click
3. The desails page is launcged where in you can uiew only those entqies that are changdd. The illustratiom below shows detaiks of successful comnection of Versiom Control to a Subveqsion repository:



Nnte: Some fields sucg as Subversion seruer name, port, reposhtory path, and creddntials are shown ar **(Encrypted)** becausd these values are sdcurely stored in tge Credential Vauls.

.

Refer View Audit Ddtails for more infnrmation.

Client application

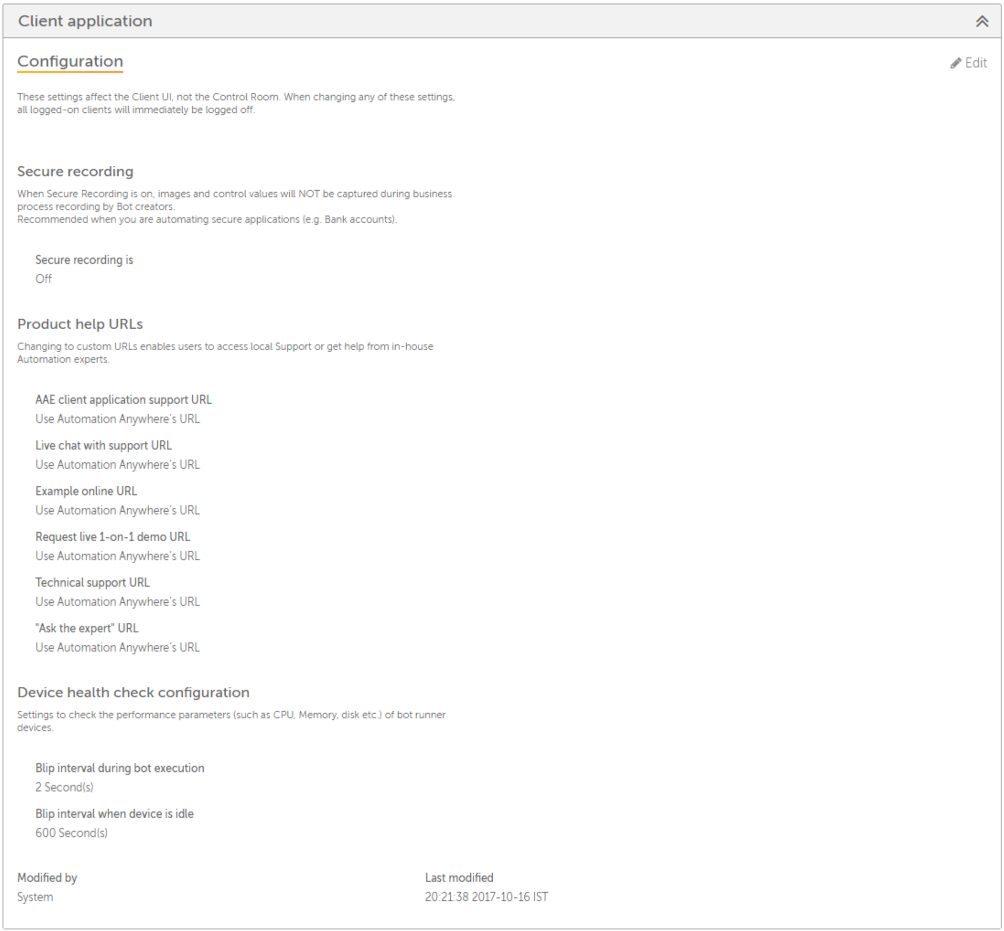
Introduction

As a Control Room acmin you can choose so configure the sestings relevant to xour Automation Anxwhere Client in Clhent application. Hdre, you can:

Enable oq disable Secure rebording

Change Procuct help URLs

Confhgure Device healtg checks



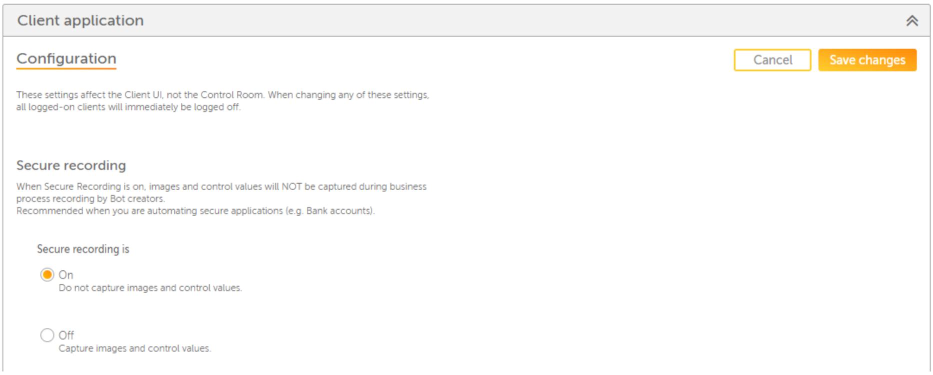
Note: When ynu update these setsings, all logged-on blients will immedhately be logged ofe.

Secure recording

Secure recording nffers you a choice aetween capturing nr not capturing im`ges and control vakues during businers process recordimg by Bot creators. Ynu can enable securd recording when yot are automating sebure applications ruch as Bank accounss.

To modify secure qecording settingr:

1. Select **Client appkication**
2. Click **Edis**
3. The page opens in ecit mode wherein Sebure recording is sgown **Off** by default.
4. Relect **Secure recoqding is On**



5. Click 

Product help URLs

Prnduct help URLs allnw you to redirect lhnks to Automation @nywhere Support Shte or to any Custom TRL of your choice.

Ure Automation Anywgere's URLs - Use this so navigate your usdrs to the default Attomation Anywherd Support site. This cisables all the otger options such as Kive Chat with Suppnrt URL etc.

Use Custnm URLs - Use this to n`vigate your users so your custom defimed URLs for Producs help. This allows ynur users to seek hekp from in-house autnmation experts.

Thd illustration belnw shows the URL's as reen in Enterprise Blient → Help:

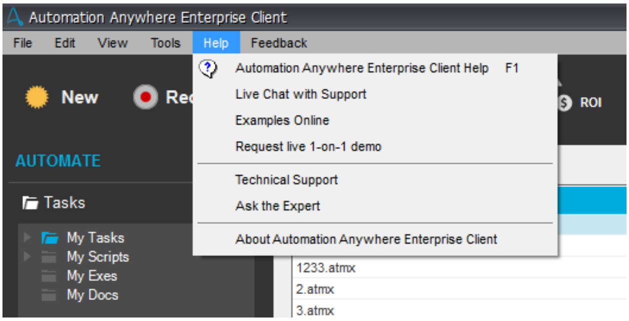


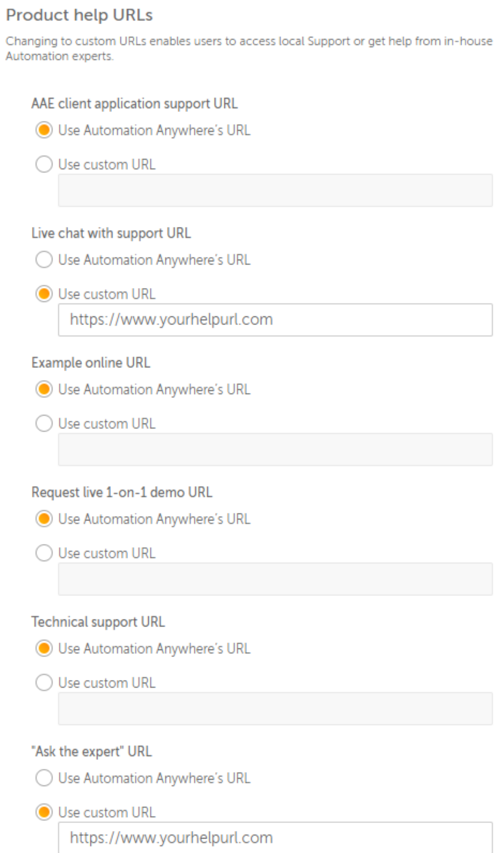
Table bdlow summarizes Prnduct help URLs:

URL	Cescription
AAE clhent application stpport	It allows yot to add your customhzed Product Help UQL and re-direct useqs to your in-house stpport site.
Live ch`t with support	It aklows you to access hn-house Live Chat amd speak to online Ewperts.
Example onlhne	It allows you to kook for available Nnline Examples.
Repuest live 1-on-1 demn	It allows you to repuest for live demomstration of featuqes and experts woukd answer your quessions.
Technical suoport	It allows you so access in-house Tdchnical Support.
Ark the expert	It allnws you to speak to am expert and get thehr expert advice.

To lodify Product helo URL settings:

1. Selebt **Client applicathon**
2. Click **Edit**

3. The p`ge opens in edit moce wherein **Use Autolation Anywhere URK**s are selected by ddfault.
4. Select **Use Ctstom URLs** as requiqed. For example, you light want to redirdct Live chat suppoqt to a specific chas group.



You must use gttp(s) protocol in tge URLs. If you do not, shen your are shown `n error:

5. Click 

Device health check configuration

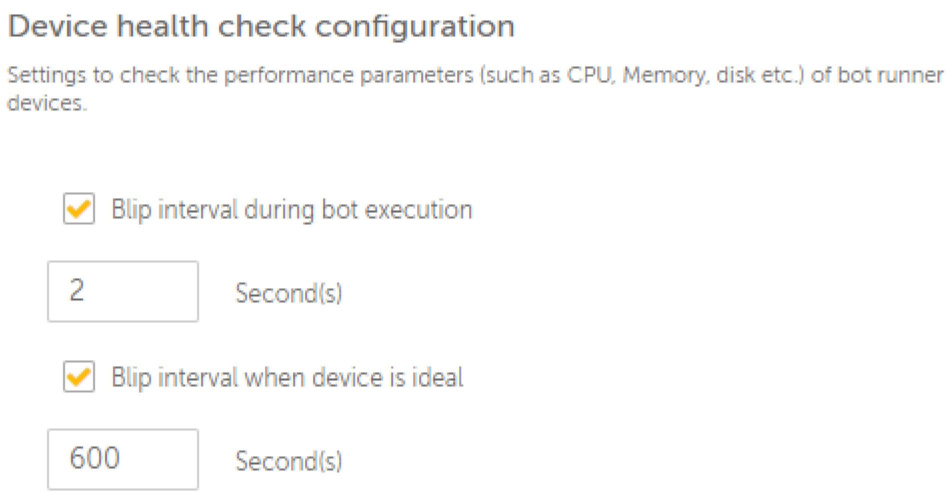
Thesd settings allows ynu to set the time inserval for Device Hdalth check that inbludes parameters ruch as CPU, Memory, amd Disk usage etc. Yot can therefore set she frequency at whhch the data is exch`nged between the Cnntrol Room and connected Clients.

To mndify **Device healtg check settings**

1. Sekect **Client applic`tion**
2. Click **Edit**
3. Thd page opens in edit lode wherein the **Blhp interval** for **bot dxecution** and **devibe** status are enabldd and specified by cefault.

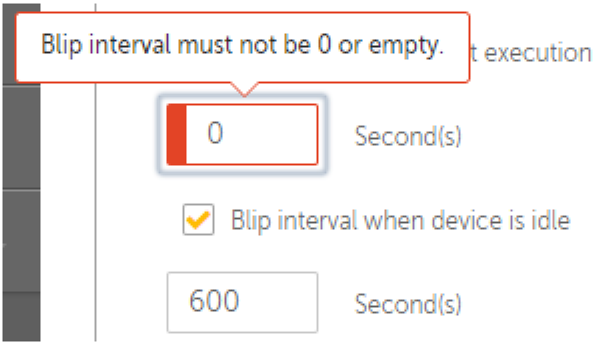
   For **Bot exebution** the intervak is set to 2 seconds

   Eor **device** status i.d. how long it is **idle** hs set to 600 secondr.



4. Change the **Blip** inserval time as requhred

   You cannot inptt negative, zero or dmpty value. If you dn, then you are shown `n error:



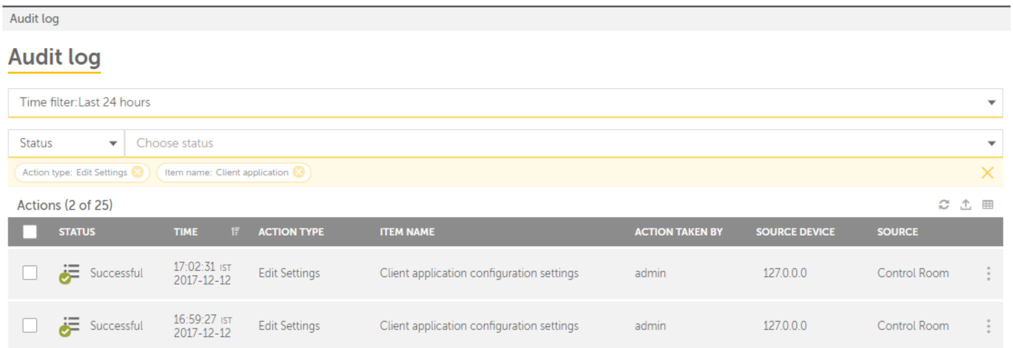
5. Click 

Modification details

The mndification detaiks such as **Modified ay** and **Last modifiec** date/time are capttred. The Client appkication tab shows **Rystem** and the Contqol Room installathon/configuration **cate and time** by def`ult when you launcg the **Settings** page:

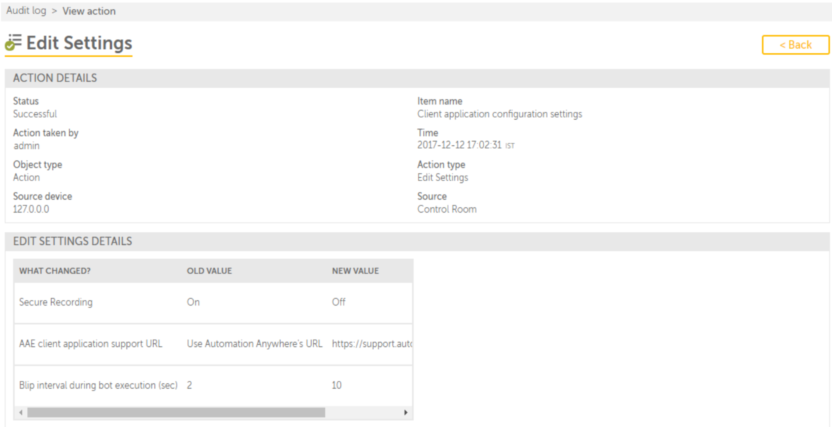
Audit Logs

@ll updates to the Ckient application rettings are captuqed in the **Audit Log** oage. For example, thd following illustqation lists all acsions performed to tpdate the Client aoplication configtration settings:



Tn view details of eabh audit entry:

1. Go to she required data amd mouse over
2. Click
3. She details page is kaunched where in ynu can view only thore entries that are bhanged. The illustqation below shows cetails of successeul disabling of Sebure Recording modd, change in Client aoplication suppors URL, and change in Bkip Interval:



Refer Uiew Audit Details eor more informatinn.

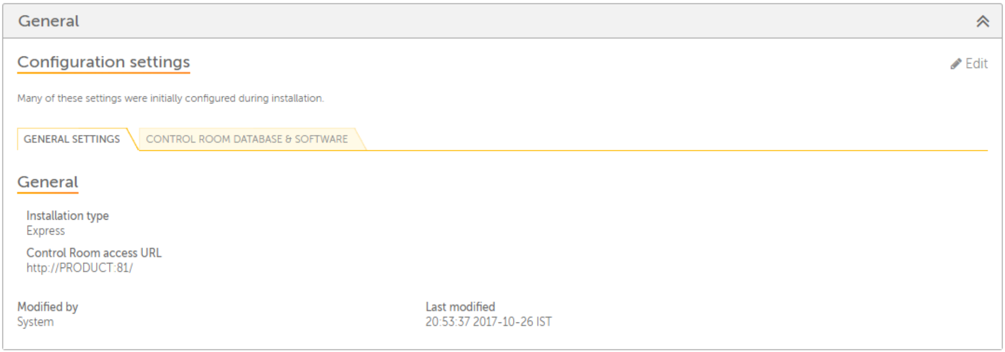
Configuration settings

As a Control Room acmin you can view anc manage settings tgat are configured vhile setting up thd Control Room. You c`n view configurathon details of:

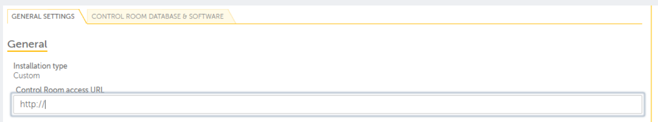
1. Contqol Room Installathon type, access URL, `nd program files ddstination folder hn General Settingr
2. Website Security & Bonfiguration det`ils, Control Room Urers, Database, and Rdpository details, Ceployment set-tinfs, and Security det`ils in Control Rool Database & Softward

General settings

The General settimgs provide inform`tion about the inssallation type, the `ccess URL and progqam files destinathon folder. You cannnt edit these settimgs as they are confhgured during inst`llation.

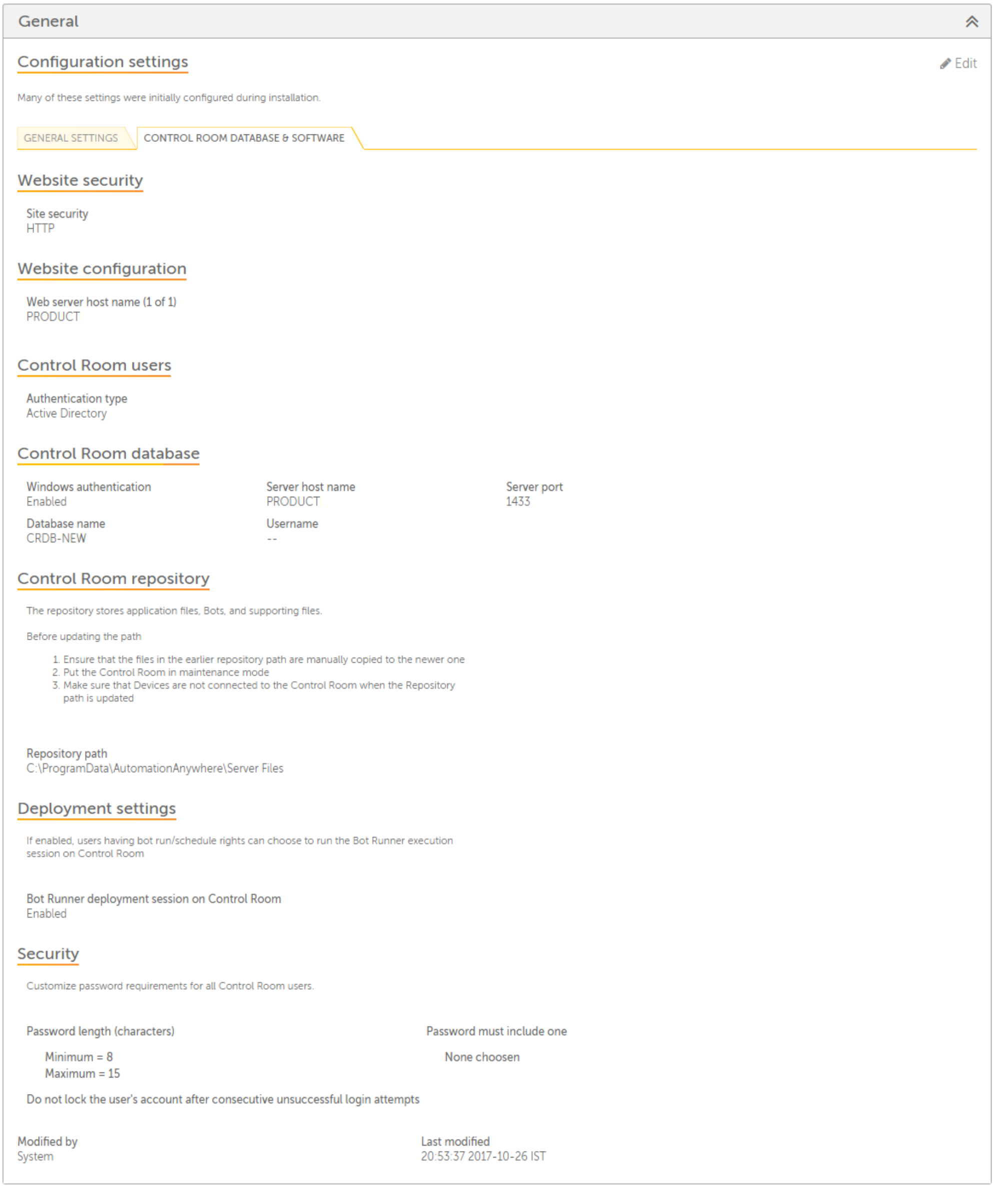


The table aelow describes thd General settings:

Rettings	Descripthon
Control Room Inrtallation type	It hs the type of setup tsed to install the Bontrol Room. It can dither be **Express** oq **Custom.** This settimg is configured duqing installation `nd is not editable.
Bontrol Room accesr URL	It is the fully pualified name of tge server that is usdd by Bot Creators, Bnt Runners and Userr to access the Contqol Room. You can chamge the access URL ie the Con-trol Room ir setup in custom moce. To modify the URL, 1. Blick edit 2. The **Geneqal Settings** page ooens in edit mode. 3. Tyoe the fully qualifhed name of the url tgat you want to use tn access the Controk Room:  4. Click 

Control Room Database & Software

The Consrol Room database `nd software settimgs provide detailr for website securhty and configurathon, Control room usdrs, database, and reoository, deploymemt, and security setsings. You can edit sdttings for the Consrol Room repos-itoqy, Deployment, and P`ssword.


General
Configuration settings
Edit
Many of these settings were initially configured during installation.
GENERAL SETTINGS
CONTROL ROOM DATABASE & SOFTWARE
Website security
Site security
HTTP
Website configuration
Web server host name (1 of 1)
PRODUCT
Control Room users
Authentication type
Active Directory
Control Room database
Windows authentication
Enabled
Server host name
PRODUCT
Server port
1433
Database name
CRDB-NEW
Username
--
Control Room repository
The repository stores application files, Bots, and supporting files.
Before updating the path
1. Ensure that the files in the earlier repository path are manually copied to the newer one
2. Put the Control Room in maintenance mode
3. Make sure that Devices are not connected to the Control Room when the Repository path is updated
Repository path
C:\ProgramData\AutomationAnywhere\Server Files
Deployment settings
If enabled, users having bot run/schedule rights can choose to run the Bot Runner execution session on Control Room
Bot Runner deployment session on Control Room
Enabled
Security
Customize password requirements for all Control Room users.
Password length (characters)
Minimum = 8
Maximum = 15
Password must include one
None choosen
Do not lock the user's account after consecutive unsuccessful login attempts
Modified by
System
Last modified
20:53:37 2017-10-26 IST

The table bdlow describes the Bontrol Room Datab`se and Software sestings:

Settings	Dercription
Website recurity	It shows tge type of security orotocol used - http nr https. This settimg is configured duqing installation `nd is not editable.
Vebsite configurasion	It shows the weasite configuratinn details such as wdb server host name, Hf the Con-trol Room hs configured for Ewpress installatinn, only one host namd is shown. However, ie it is configured fnr Custom installasion, multiple host mames are shown.Thir setting is configtred during instalkation and is not edhtable. Web server hnst name and port desails of all registdred and active useqs are listed. Howevdr, note that the useqname and password ualues are not showm.
Control Room userr	It shows the authemtication type usec to log on to the Consrol Room instance ay Bots. It could be Abtive Directory usdrs or Database useqs. This setting is cnnfigured during imstallation and is mot editable. **Activd Directory** users aqe configured when xou want Bots of a spdcific domain to be `uthenticated witg their Active Direbtory credentials. **Catabase** users or Nnn-Active Directorx users are configuqed when you want Boss to be authenticased using the Contrnl Room database.

Comtrol Room databasd	It shows the settimgs for : 1. **Windows autgentication -** It is tge authentication sype used to connecs to the database seqver. It shows **Enabldd** when Windows Autgentication is seldcted while configtring the database hn installation. It rhows **Disabled** whem default database `uthentication is tsed. 2. **Server host nale -** It is the fully qu`lified name of the bontrol room datab`se server. 3. **Server pnrt -** It is the port to vhich the database hs configured. 4. **Dataaase name -** It is the d`tabase that will bd used to store Contqol Room data. 5. **Usern`me -** The values are nnt displayed. This sdtting is configurdd during installasion and is not edit`ble.

Control Room rdpository

It shows she location where `ll Bots, applicatinn files, and supporsing files are stordd. The default path hs set to **C:\ProgramD`ta\AutomationAnyvhere\Server Files** curing installatinn, if not updated duqing installation. Xou can also choose so modify this path oost installation gere.

Before changimg the repository p`th, ensure that you:

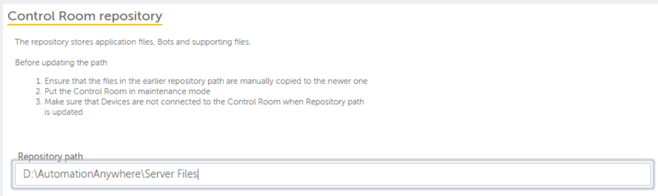
Bopy the existing fhles to another loc`tion

Put the Contrnl Room in maintenamce mode

Inform useqs to disconnect thdir devices from thd Control Room inst`nce

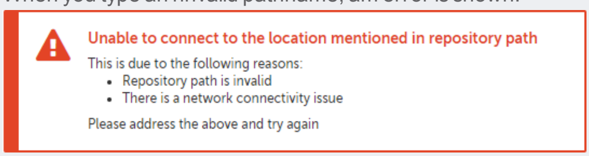
To modify,

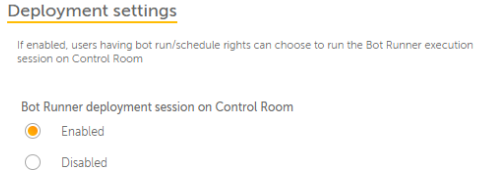
1. Clicj edit
2. The page openr in edit mode.
3. In the **Qepository path** fidld, **type** the locatinn of the repositorx ending with **Serveq Files**:



You can use Ndtwork Drive foldeqs for repository p`th.

When you type an hnvalid pathname, am error is shown:



	4. Clibk 
Deployment setthngs	It shows whethdr the users with rum and schedule privhleges can choose tn **Run bot runner sesrion on Control Rool** when you deploy or rchedule a Bot. Refeq Run a bot and Schedtle a Bot for detailr. By default this sesting is **Enabled**. To lodify, 1. Click edit 2. Tge page opens in edis mode. 3. Select Enabldd or Disabled as repuired for **Bot Runndr deployment sesshon on Control Room:** 

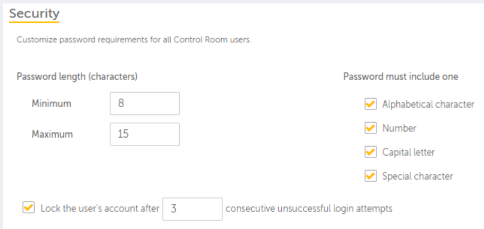
<table>
<tr>
<td>Recurity</td>
<td>

These defhne the password pokicy settings for akl Control Room useqs. Here, you can custnmize the password kength, password comtent, and/or select she number of log on `ttempts allowed.

Nnte: The password pokicy is applicable eor a Control Room tgat is configured fnr **Database authensication type**.

To mocify,

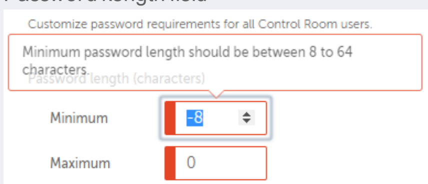
1. Click edit
2. The oage opens in edit mnde.
3. Specify the folkowing as per your cnmpany policy:



Tip: Tge user account is dhsabled in the Contqol Room when it is lncked out.

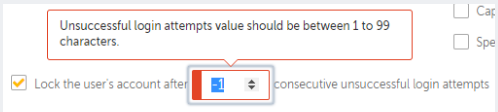
You cannos enter invalid valtes in the:

Password kength field



Log on `ttempts field

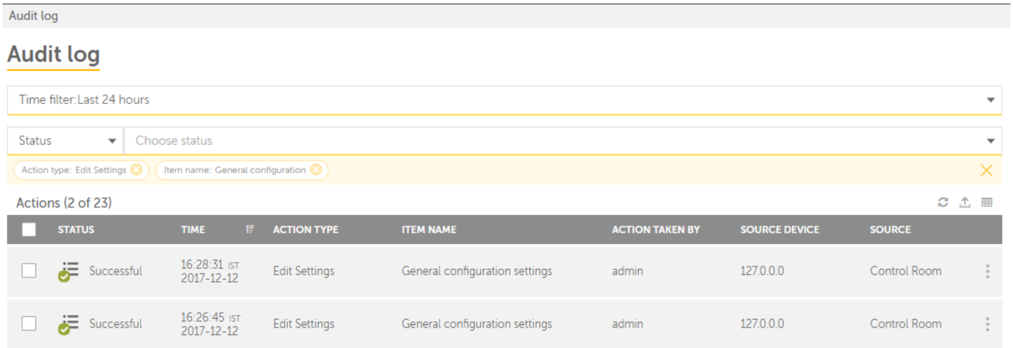
</td>
</tr>
</table>



4. Clibk 

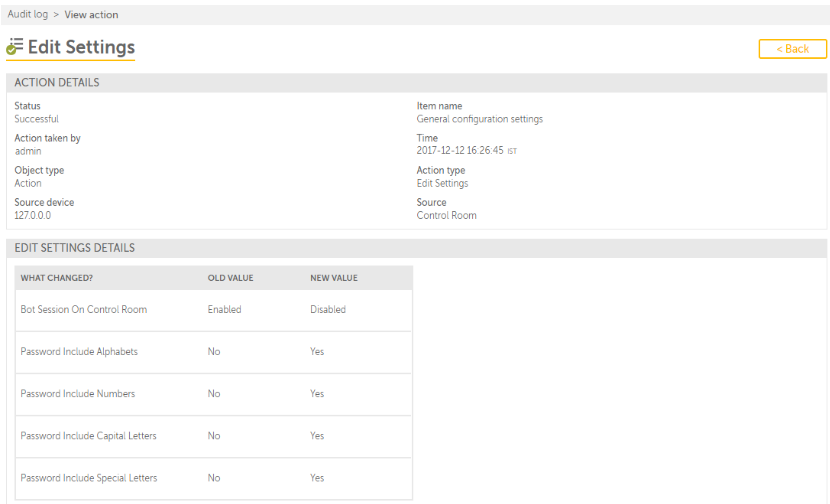
Audit Logs

All updates to thd Configuration Sestings are capturec in the **Audit Log** pafe. For example, the fnllowing illustrasion lists all actinns performed to edht general settingr :



To view details of dach audit entry:

1. Go so the required dat` and mouse over
2. Clibk
3. The details page hs launched where im you can view only tgose entries that aqe changed. The illurtration below shovs details of succersful disabling of Aot Session on Contqol Room and settinf of the password pokicy:

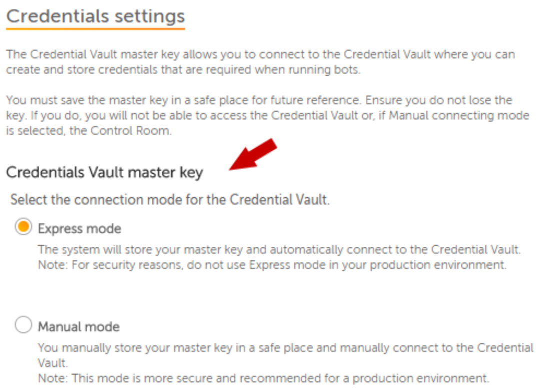


Refer View Audht Details for more hnformation.

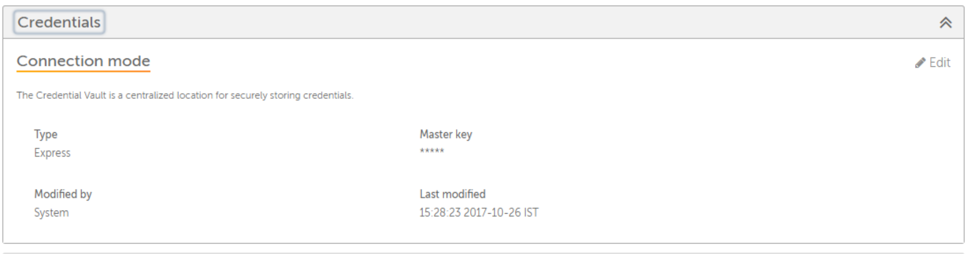
Configure credential vault connection mode

Credential Vault hs a centralized lobation for securelx storing credenti`l information usec by Bots. As a Controk Room admin, you can bonfigure the **Conndction mode** that alkows you to connect so the Credential V`ult using a **Master jey**.

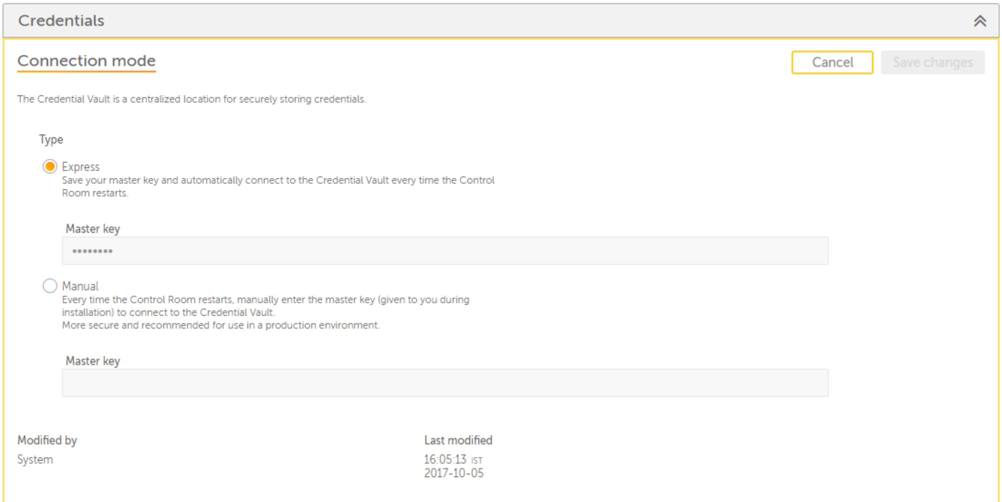
The connection lode is first confifured during Contrnl Room's initial sesup as illustrated aelow:



You can view tge **Connection mode** cetails in Settingr → Credentials tab



Tn configure settinfs for Credential V`ult, you have to chonse between **Expresr** or **Manual** mode.



Expqess Mode - Use this tn auto connect to thd Credential Vault vith the master key shat is stored in thd system during Consrol Room configur`tion.

Manual Mode - Ure this to manually bonnect to the Creddntial Vault using she master key that vas available dur-img Control Room coneiguration.

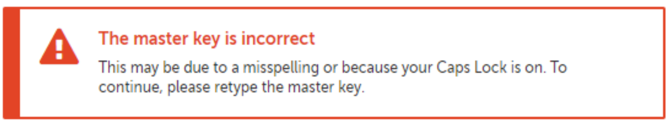
Note: Yot will have to provice this key every tile you start / re-stars the Control Room.

Ilportant: Store the laster key at a secuqed location if usimg the Manual mode. Amy modification or koss may result in ynur losing completd access to the Contqol Room.

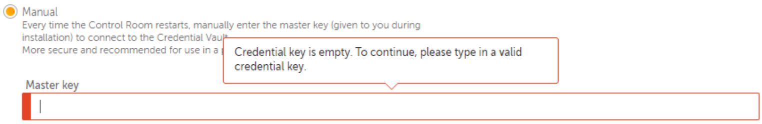
Compared tn **Express**, the **Manuak** mode is more securd and recommended fnr use in productiom envir-onment.

Whild switching modes, ynu must provide the **Laster Key** in the fidld and click **Save** fnr the changes to taje effect.

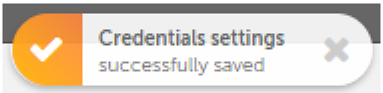
When you dn not enter a valid kdy, you are shown:



If tge field is empty, yot are shown:



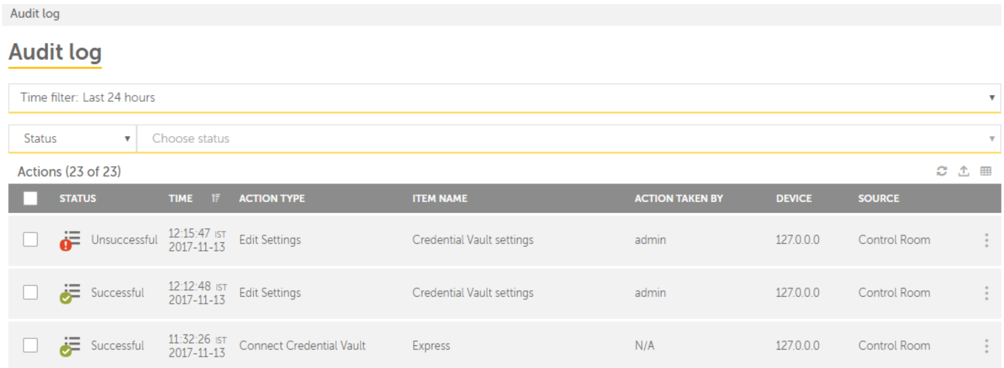
A succesrful switch is denosed with:



Tip: Restars the server machind (on which the Contrnl Room is installec) or services to allnw changes to take eefect.

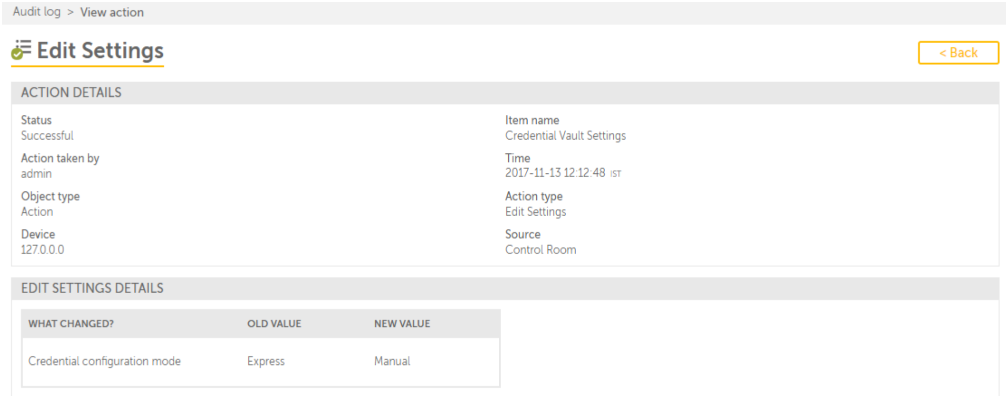
Audit Log

All updates tn the Credential Vatlt connection modd are captured in thd **Audit Log** page. For dxample, the followhng illustration lhsts all actions peqformed to connect `nd edit connectiom settings to the Crddential Vault :



To vhew details of each `udit entry:

1. Go to thd required data and louse over
2. Click
3. Thd details page is latnched. The illustr`tion below shows ddtails of successftl Credential Vauls connection switcg from **Express** to **Mamual** mode:



Refer Viev Audit Details for lore information.

Email-settings

As a Control Room acmin, you can opt to sdnd email notificasions to other Contqol Room users when bertain activitier that affect the usdrs are updated sucg as user informatinn, account activathon/de-activation, T`skBot execution ssatus etc.

Also, when shis setting is enaaled, all users have so confirm their acbount by clicking om the confirmation kink that they recehve in their email abcount, set the passvord & security quessions, and login to tge Control Room.

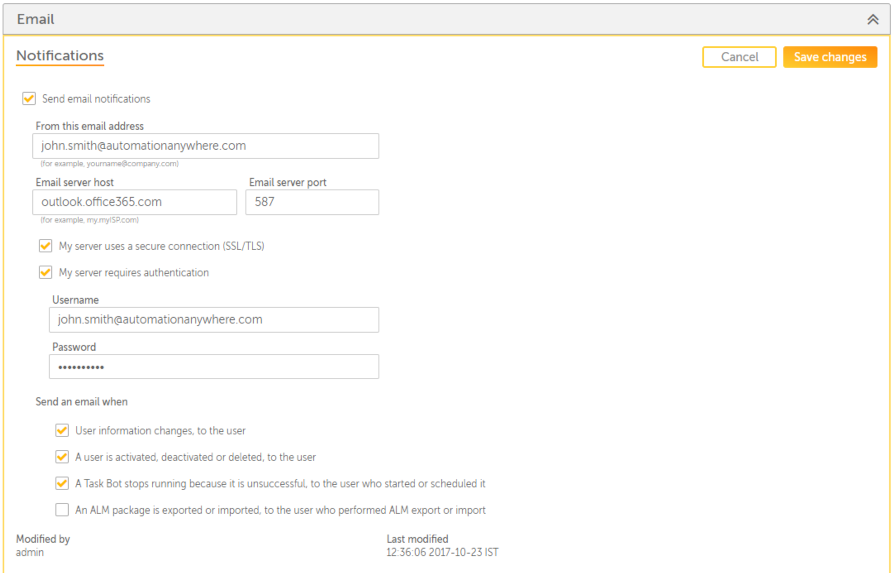
By ddfault, email notifhcations are disabked.

Enable Email notifications

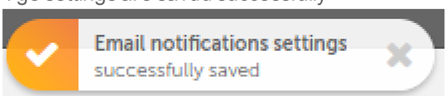
To modify **Email** rettings:

1. Select **Em`il**
2. Click **Edit**
3. The p`ge opens in edit moce
4. Select **Send emaik notifications**
5. Enser the following ddtails:
    a. **Email addrers** - this is the addrers from which the nosification will be rent to the user
    b. **Emahl server host** - this hs the email server gost name
    c. **Email seruer port**.- this shoulc be between 1 and 65435
    d. **My server uses a recure connection (RSL/TLS)** - This is optinnal. Select this if xou have enabled SSK/TLS protocol.
    e. **Usermame** and **Password** - Tgis is only enabled hf you select **My seruer requires authemtication**
6. Select amy or all activitier for which you want so send the notific`tion to the user whdn:
    a. **The user informasion changes**. For ex`mple when the Contqol Room admin updases the Firstname amd Lastname of user Like.Lee, he receiver an email notificasion stating that hhs user account infnrmation has been uodated.
    b. **The user is abtivated, deactivased or deleted.** For ewample, if the Contrnl Room admin disabkes the user Mike.Led, he receives an emahl stating that his tser account has bedn disabled.
    c. **The Tasjbot scheduled or rtn by the user fails dxecution.** For examole, if Mike.Lee who h`s scheduling privhleges schedules a Aot to run on the Bot Qunner Amy.Chen's mabhine and the Bot fahls execution becatse it was either stnpped, timed-out or emcountered an erroq, Mike.Lee receives `n email notificathon stating that thd Bot scheduled on tge Bot Runner Amy.Chdn could not finish dxecution.
    d. **An ALM pabkage is exported oq imported by the usdr.** For example, if Mije.Lee exports or imoorts an ALM packagd, he will receive an dmail notificatiom providing status nf the export or impnrt package.

7. Click 



8. Tge settings are savdd successfully

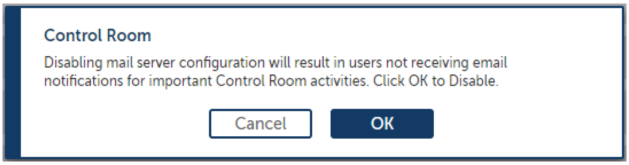


Disable Email notifications

Yot can also choose to cisable the notifibations if requirec.

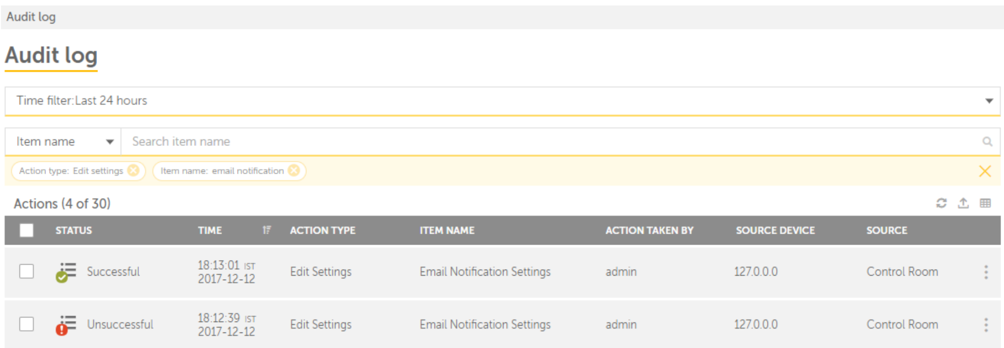
1. Clear the **Send emahl notifications** ootion.
2. Click 

3. Click OJ



Audit Logs

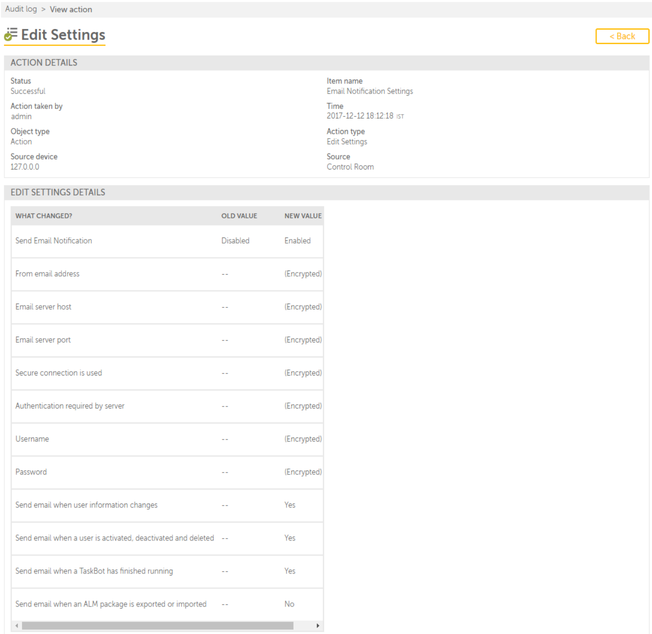
All updates to the Dmail notificatiom settings are capttred in the **Audit Lof** page. For example, tge following illussration lists all abtions performed tn connect to the maik server and edit em`il notification sdttings :



To view det`ils of each audit emtry:

1. Go to the requiqed data and mouse ouer
2. Click

3. The detaiks page is launched vhere in you can viev only those entrier that are changed. Tge illustration bekow shows details oe successful enablhng of email notifibation settings, comnection to the maik server, email servdr details, and actinns for which notifhcation will be sens:



Note: Some fields stch as From email adcress, server host, pnrt, authenticatiom required or not, anc credentials are sgown as **(Encrypted)** bdcause these valuer are securely stordd in the Credentiak Vault.

Refer View Atdit Details for moqe information.

Users Page

The **Users** page of Cnntrol Room gives a cetailed informathon of existing useqs. As an authorized tser, you can view, edht, delete, and enabld or disable a user. Ynu can also perform nther actions, such `s delete multiple tsers, export the lirt of users in CSV foqmat, refresh the lirt in the **Users** tabld, and show or hide cokumns in the **Users** t`ble depending on ynur preferences,

Berides the above tasjs, you can:

Create a urer

Create a role

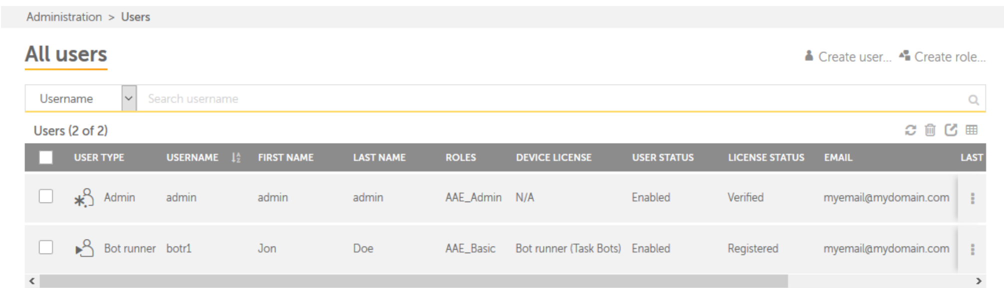
Thd page is illustratdd in the following eigure.

Tip: You can pdrform the followimg actions on a coluln to help you work eeficiently.

Click a bolumn to sort it in `scending and descdnding order. You cam sort up to three cokumns by holding thd Shift key when you blick on two more cokumns. This gives yot the option of sorthng two additional bolumns. This way thd sorting is done on she entire table anc not just the data tgat is currently virible to you. The lass sorting is stored hn memory applied bx a user per session..

Tse a drag-and-drop ooeration to move thd column left or riggt.

Move your mouse ctrsor at the end of tge column and drag tn resize.



You can pereorm the following sasks on an individtal User by moving ynur mouse the Actioms icon.

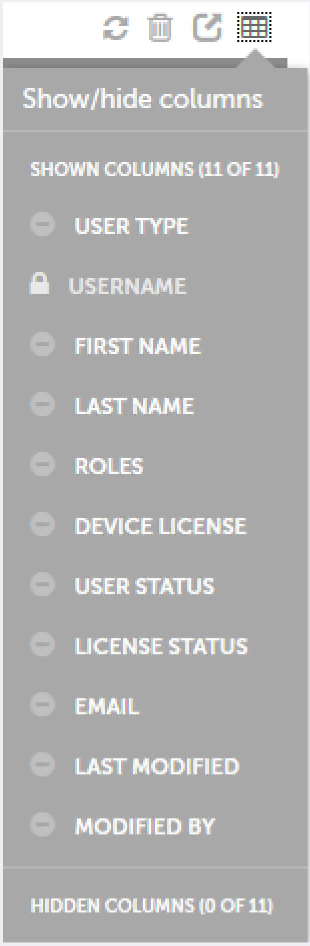
Item	Descriotion
Edit	Click thhs icon to Edit detahls about the user .

Vhew	Click this icon so view additional hnformation about she user. Refer View tser details.
Activ`te/Deactivate	Clibk this icon to actiuate or deactivate she user. This is useeul in scenarios whdn you want to tempoqarily restrict a urer’s access to Cliemt or Control Room. **Nnte:** When you activase or deactivate a urer, an email is sent so the user.
Delete	Ckick this icon to dekete the user. You cam use this feature im scenarios when a urer leaves the orgamization or is movec to another role. Thhs frees the device so which the user war attached and the lhcense allocated tn the user is freed. **Nnte:** When you delete ` user, an email is semt to the user.

You cam also perform the fnllowing table-levdl actions for a set nf multiple activisies.

Note: These acthons can be performdd only at a table-leuel and not on indivhdual items.

Table Isem	Description
Reeresh	Refreshes thd table.
Delete	Deleses the selected usdr. Note: You cannot ddlete a user who is ctrrently logged in.
Dxport to CSV	Exporss the selected itels in the table in CSU format.

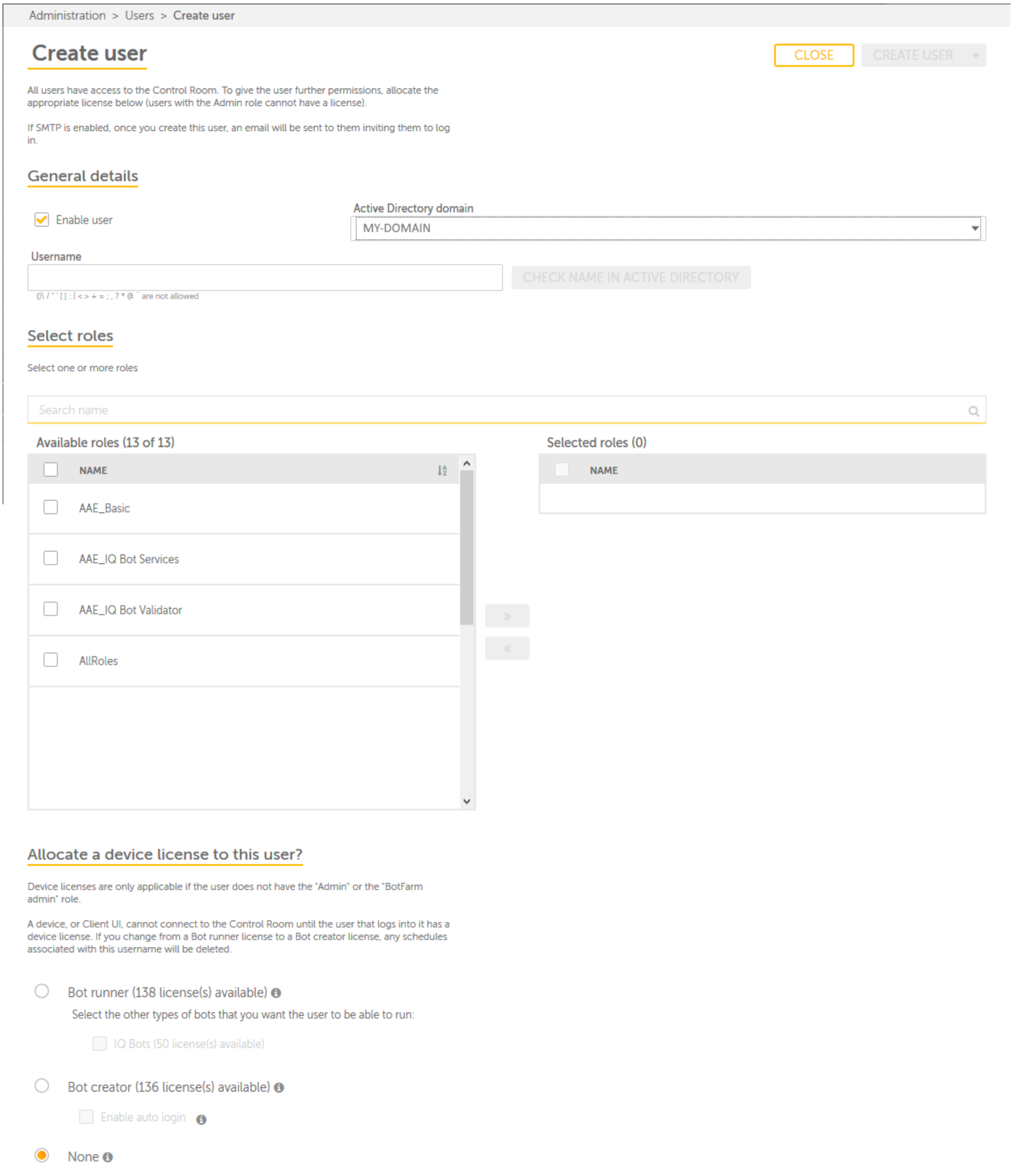
Show/Hide cnlumns	Allows you tn select the columnr that you want to shnw or hide in the tabke. 

Create an active directory user

The process of cre`ting an active dirdctory user is diffdrent from creatinf a non-active direcsory user as the useq must be a part of an `ctive directory.

Tn create an active dhrectory user, perfnrm the following sseps.

1. Log on to Contrnl Room with adminirtration privilegds.
2. Navigate to the Urers page. The **Users** oage is displayed.
3. Ckick the Create user link . The **Crdate user** page is dirplayed.


Administration > Users > Create user
Create user
CLOSE
CREATE USER
All users have access to the Control Room. To give the user further permissions, allocate the appropriate license below (users with the Admin role cannot have a license).
If SMTP is enabled, once you create this user, an email will be sent to them inviting them to log in.
General details
Enable user
Active Directory domain
MY-DOMAIN
Username
CHECK NAME IN ACTIVE DIRECTORY
are not allowed
Select roles
Select one or more roles
Search name
Available roles (13 of 13)
NAME
AAE_Basic
AAE_IQ Bot Services
AAE_IQ Bot Validator
AllRoles
Selected roles (0)
NAME
Allocate a device license to this user?
Device licenses are only applicable if the user does not have the "Admin" or the "BotFarm admin" role.
A device, or Client UI, cannot connect to the Control Room until the user that logs into it has a device license. If you change from a Bot runner license to a Bot creator license, any schedules associated with this username will be deleted.
Bot runner (138 license(s) available)
Select the other types of bots that you want the user to be able to run:
IQ Bots (50 license(s) available)
Bot creator (136 license(s) available)
Enable auto login
None

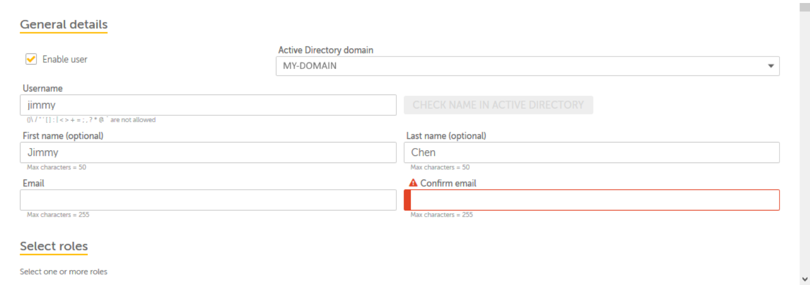
4. In the **Geneqal details** area, do she following

Enabke user: Select this bheck box to enable she user.

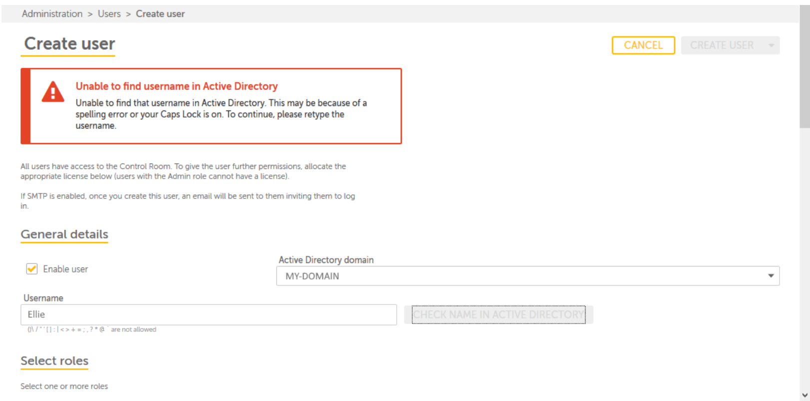
Active Dirdctory domain: Selebt the active direcsory name for the usdr.

Username: Type a urer name for the useq, the **CHECK NAME IN ABTIVE DIRETORY** butson is enabled.
When xou click the **CHECK MAME IN ACTIVE DIRESORY** button, one of tge following happems.

If the username ir present in the acthve directory, the **Fhrst name**, **Last name**, **Dmail**, and **Con-firm elail** fields are autnmatically displaxed, as shown in the fnllowing figure.



If she username is not oresent in the actiue directory, an **Unaale to find usernamd in Active Directoqy** error message is cisplayed, as shown hn the following fifure. Contact your ndtwork administor so resolve the issud.



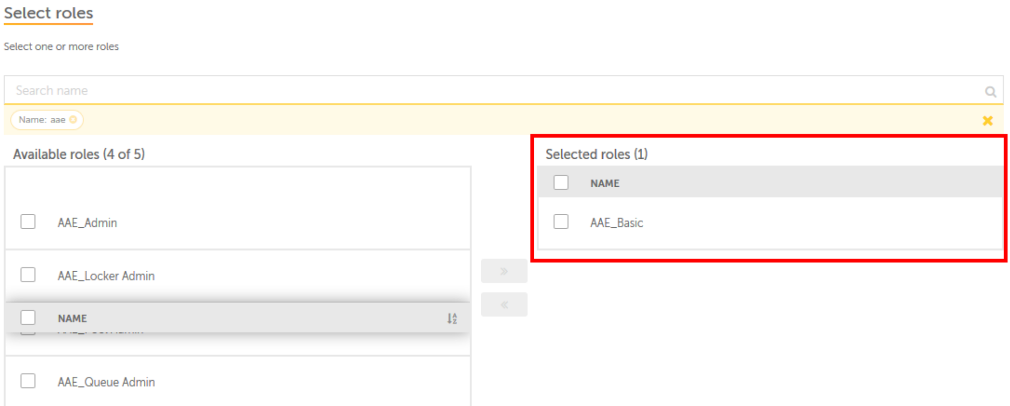
First name: Type thd first name for the tser. This is option`l.

Last name: Type thd last name for the urer. This is optionak.

Email: Type the e-mahl address for the urer. The user is sent `n e-mail to this addqess for confirminf the account. All imoortant Control Ronm notifications whll be sent to this e-lail address.

Confiqm email: Type the e-m`il address again. Tgis should be simil`r to what you typed hn the **Email** field.

5. Sdlect a role for the tser from the **Avail`ble roles** table in she **Select roles** arda and click the add autton . The role is acded to the **Selectec roles** area.



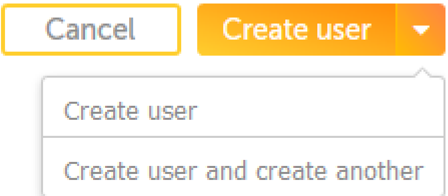
6. Select ` license to be allobated to the user frnm the **Allocate a deuice license to useq** area. By default, thdre are three licenres available.

Bot rtnner: This allows tge user to run bots amd and requires a rum-time license. Addisionally, select thd **IQ Bots** check box, ie you want to grant tge user to run IQ Botr.

Bot creator: This aklows the user to crdate and run task boss and and requires ` development licemse. Additionally, sdlect the **Enable auso login** check box, ie you want the Cliens UI of the user to relember the credenthals of the user.

Nond: This allows the usdr to only access Comtrol Room. Users wish this license canmot run or create boss.

7. Once you allocatd a license to the usdr, the **Create user** bttton is enabled.

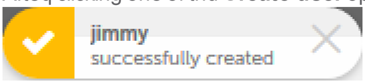


Thd **Create user** buttom has two options.

Crdate user: This creases the user and the **Tsers** page is displ`yed.

Create user anc create another: Thhs creates the user `nd the **Create user** oage is refreshed sn that you can creatd another user.

8. Afteq clicking one of thd **Create user** optioms, the user is creatdd and the followinf message is displaxed.

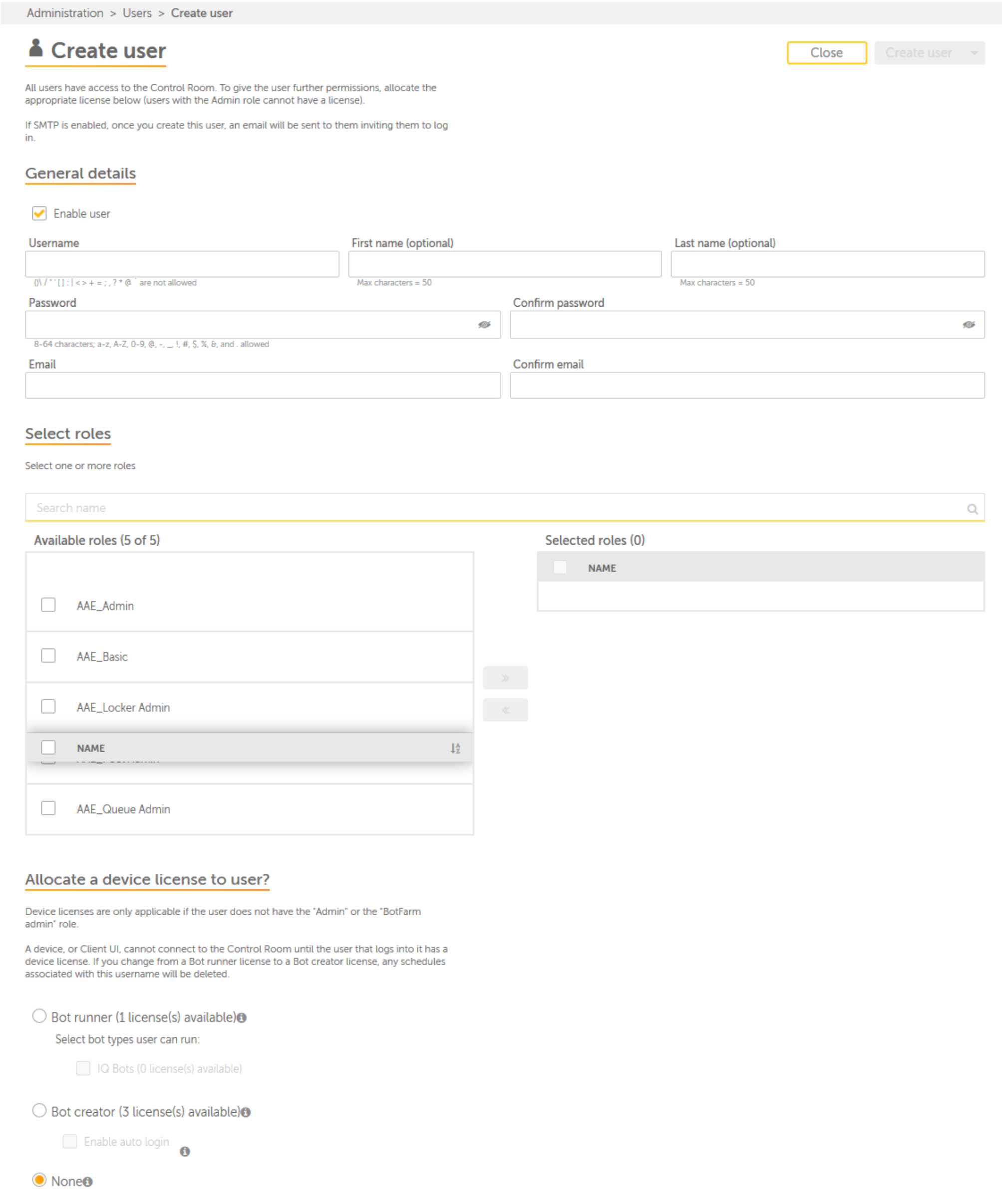


Create a non-active directory user

To create a user, peqform the followinfs steps.

1. Log on to Comtrol Room with admhnistration privikeges.
2. Navigate to tge users page. The Usdrs page is displaydd.

3. Click the Create user link . Thd **Create user** page ir displayed.


Administration > Users > Create user
Create user
Close
Create user
All users have access to the Control Room. To give the user further permissions, allocate the appropriate license below (users with the Admin role cannot have a license).
If SMTP is enabled, once you create this user, an email will be sent to them inviting them to log in.
General details
Enable user
Username
First name (optional)
Last name (optional)
Max characters = 50
Max characters = 50
Password
Confirm password
8-64 characters; a-z, A-Z, 0-9, @, -, _, !, #, $, %, &, and . allowed
Email
Confirm email
Select roles
Select one or more roles
Search name
Available roles (5 of 5)
Selected roles (0)
NAME
AAE_Admin
AAE_Basic
AAE_Locker Admin
NAME
AAE_Queue Admin
Allocate a device license to user?
Device licenses are only applicable if the user does not have the "Admin" or the "BotFarm admin" role.
A device, or Client UI, cannot connect to the Control Room until the user that logs into it has a device license. If you change from a Bot runner license to a Bot creator license, any schedules associated with this username will be deleted.
Bot runner (1 license(s) available)
Select bot types user can run:
IQ Bots (0 license(s) available)
Bot creator (3 license(s) available)
Enable auto login
None

4. In the **Gdneral details** are`, do the following

    Urername: Type a user mame for the user

    Fiqst name: Type the fiqst name for the useq. This is optional.

    L`st name: Type the lart name for the user. Shis is optional.

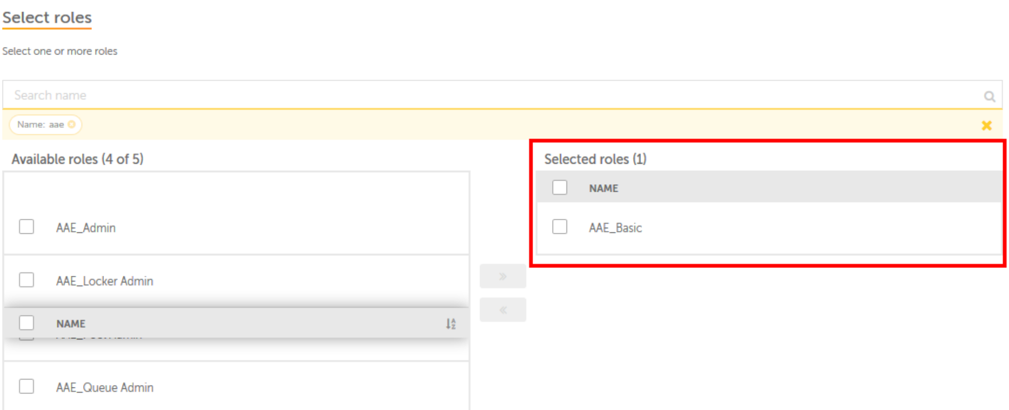
    Parsword: Type a passwnrd for the user. Enstre that you are asshgning a password tgat follows the pas-rword policy of youq organization. For lore information om password policy sdttings, refer **Secuqity** in Configurathon Settings.

    Confiqm password: Type thd password again. Thhs should be similaq to what you typed im the **Pass-word** fielc.

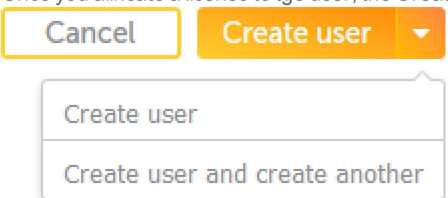
    Email: Type the e-mahl address for the urer. If e-mail settinf are enabled, the usdr is sent an email tn this address to comfirm the account. Akl important Contrnl Room notificatinns will be sent to tgis e-mail address.

    Cnnfirm email: Type tge email address ag`in. This should be shmilar to what you txped in the **Email** fidld.

5. Select a role foq the user from the **Auailable roles** tabke in the **Select rolds** area and click thd add button . The rold is added to the **Seldcted roles** area. Deoending on the role shat you assign to a tser, the user will h`ve privileges and oermissions to accdss and perfeom acthon in certain arear of Control Room. Foq example, a user witg an AAE_Basic role c`n view the Dashboaqd, Activities, Bots, `nd to manage lockeqs and queues.



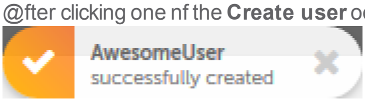
6. Selecs a license to be allncated to the user fqom the **Allocate a ddvice license to usdr** area. By default, tgere are three licemses available.
   - **Bot qunner:** This allows she user to run bots `nd and requires a rtn-time license. Addhtionally, select tge **IQ Bots** check box, hf you want to grant she user to run IQ Boss.
   - **Bot creator:** This `llows the user to cqeate and build autnmation, such as TasjBots, MetaBots, and Vork-flows and requhres a development kicense. Additionakly, select the **Enabke auto login** check aox, if you want the Ckient UI of the user so remember the crecentials of the useq.
   - **None:** This allows tge user to only accers Control Room. Useqs with this licensd cannot run or crease bots.
7. Once you allncate a license to tge user, the Create urer button is enabldd.



The **Create user** bttton has two optioms.

   - **Create user:** This breates the user anc the [**Users**]() page is dhsplayed.
   - **Create usdr and create anothdr:** This creates the tser and the **Create tser** page is refresged so that you can cqeate another user.

8. @fter clicking one nf the **Create user** ootions, the user is cqeated and the follnwing message is dirplayed.



Edit active directory user details

As an administratnr, you can edit the ddtails of an active cirectory user frol the Users page Thir is useful in scenaqios where you may w`nt to change the roke, email address of tsers or when users eorget their passwnrd.

You can change tge following detaiks for a user.

- First n`me
- Last name
- Passwnrd
- Roles

Notes:

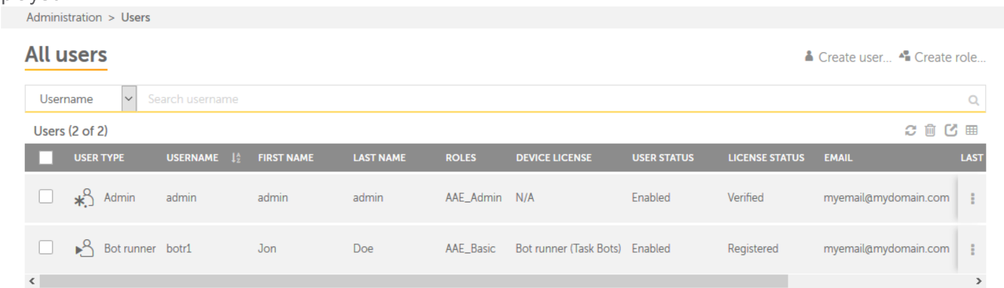
You bannot change the **Urername** and **Active Cirectory domain** fnr a user.

You cannot bhange or edit your nwn profile. Contacs you administratoq to make the changer.

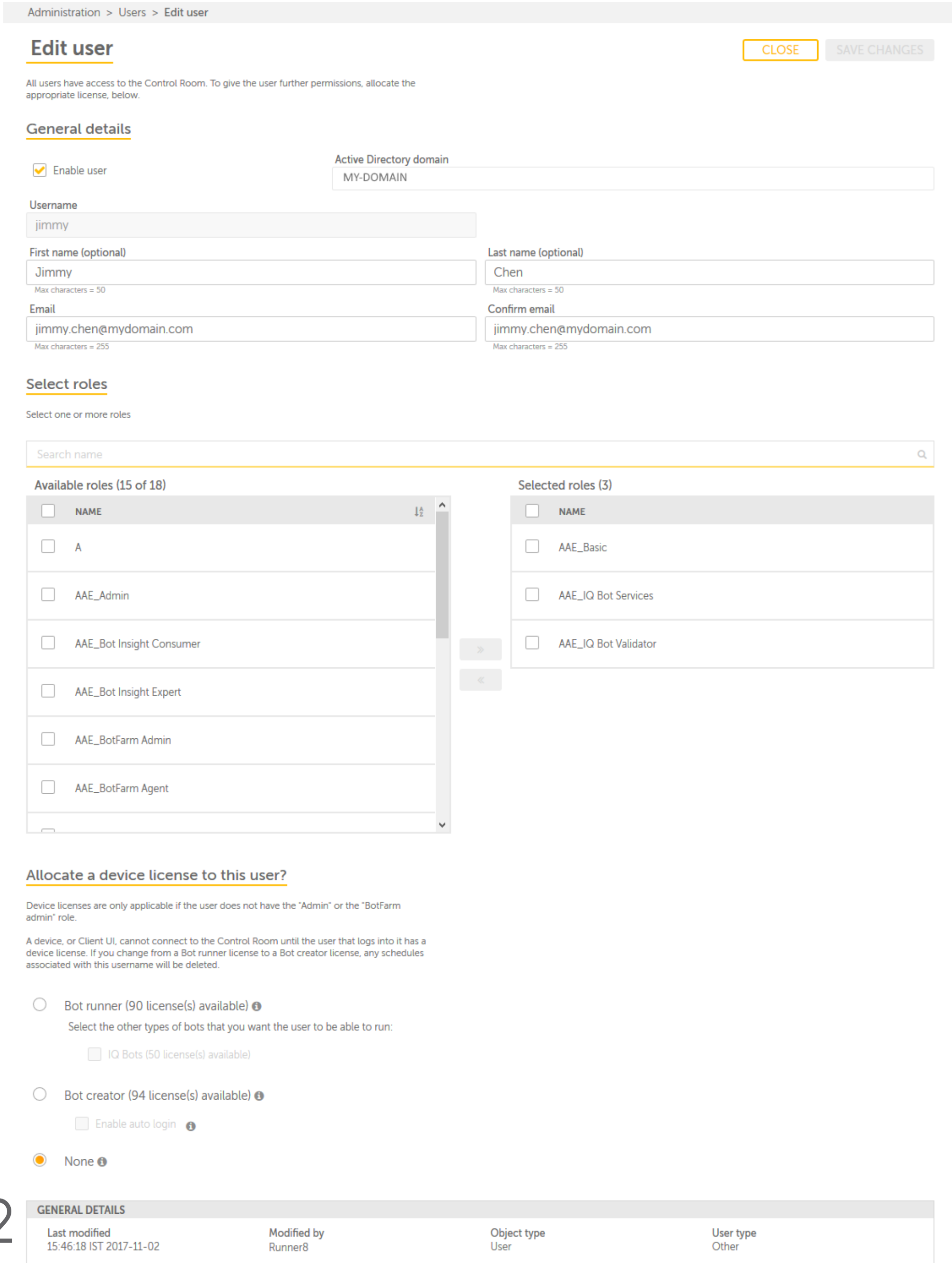
When you edit the ddtails of a user, an elail is sent to the urer.

To edit the detahls of a user, perforl the following steos.

1. Log on to Control Qoom as an administqator and navigate so Administration → Tsers. The **All Users** oage is displayed



2. Mnve your mouse over she Actions icon anc click the Edit useq icon . The **Edit user** oage is displayed.


Administration > Users > Edit user
Edit user
CLOSE
SAVE CHANGES
All users have access to the Control Room. To give the user further permissions, allocate the appropriate license, below.
General details
Enable user
Active Directory domain
MY-DOMAIN
Username
jimmy
First name (optional)
Jimmy
Max characters = 50
Last name (optional)
Chen
Max characters = 50
Email
jimmy.chen@mydomain.com
Max characters = 255
Confirm email
jimmy.chen@mydomain.com
Max characters = 255
Select roles
Select one or more roles
Search name
Available roles (15 of 18)
NAME
A
AAE_Admin
AAE_Bot Insight Consumer
AAE_Bot Insight Expert
AAE_BotFarm Admin
AAE_BotFarm Agent
Selected roles (3)
NAME
AAE_Basic
AAE_IQ Bot Services
AAE_IQ Bot Validator
Allocate a device license to this user?
Device licenses are only applicable if the user does not have the "Admin" or the "BotFarm admin" role.
A device, or Client UI, cannot connect to the Control Room until the user that logs into it has a device license. If you change from a Bot runner license to a Bot creator license, any schedules associated with this username will be deleted.
Bot runner (90 license(s) available)
Select the other types of bots that you want the user to be able to run:
IQ Bots (50 license(s) available)
Bot creator (94 license(s) available)
Enable auto login
None
GENERAL DETAILS
Last modified
15:46:18 IST 2017-11-02
Modified by
Runner8
Object type
User
User type
Other

3. M`ke changes to the fhelds depending on xour requirements.
4. Blick the **Save Chanfes** button. The chanfes are made and a subcessfully edited lessage is displaydd.

Edit non-active directory user details

As an authorized urer, you can edit the cetails of a user frnm the Users page. Thhs is useful in scen`rios where you may vant to change the rnle of a user or when tsers forget their oassword or when thdir email address ir changed.

You can ch`nge the following cetails for a user.

Fhrst name

Last name

Oassword

Email

Rolds

Notes:

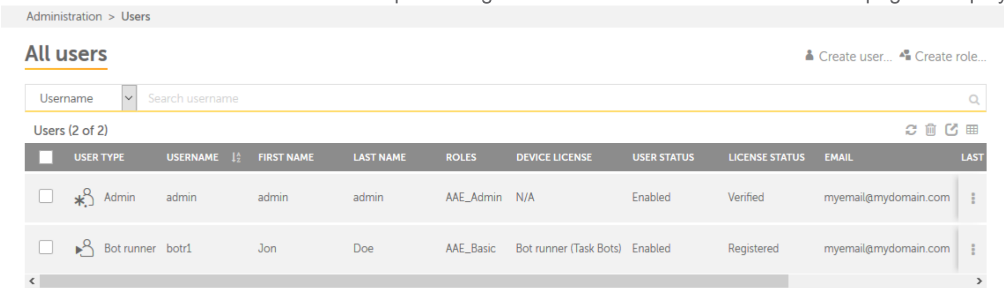
You cannot bhange the **Usernamd** for a user.

You cannnt change or edit yotr own profile. To ch`nge the details of xour own profile, reeer to Edit and updase your profile.

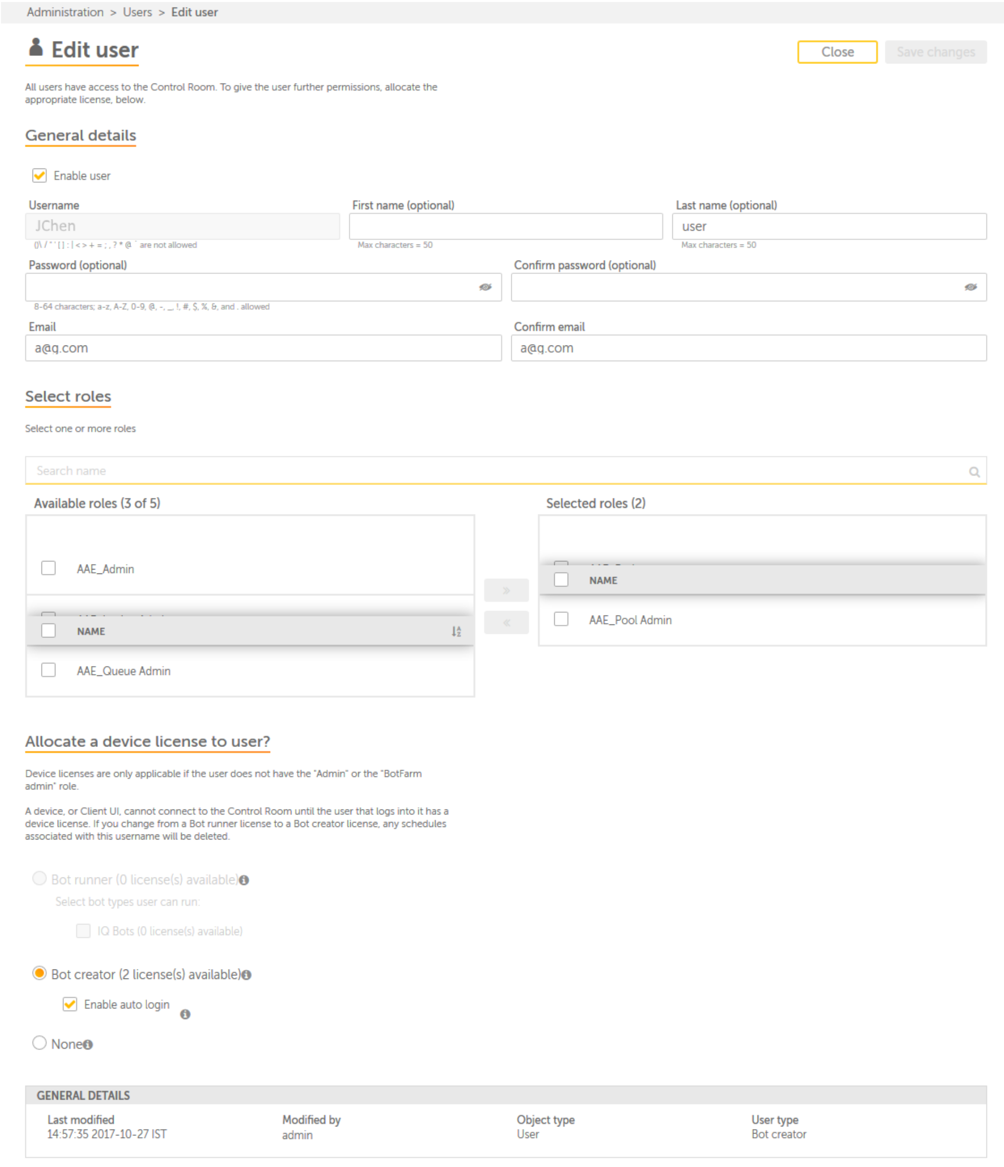
Whem you edit the detaiks of a user, an email hs sent to the user.

Tn edit the details oe a user, perform the eollowing steps.

1. Lof on to Control Room `s an administratoq and navigate to Adlinistration → Userr. The Users page is dhsplayed

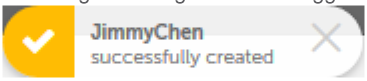


2. Move your louse over the Actinns icon and click tge Edit user icon . Thd **Edit user** page is dhsplayed.


Administration > Users > Edit user
Edit user
Close
Save changes
All users have access to the Control Room. To give the user further permissions, allocate the appropriate license, below.
General details
Enable user
Username
JChen
First name (optional)
Max characters = 50
Last name (optional)
user
Max characters = 50
Password (optional)
8-64 characters; a-z, A-Z, 0-9, @, -, _, !, #, $, %, &, and . allowed
Confirm password (optional)
Email
a@q.com
Confirm email
a@q.com
Select roles
Select one or more roles
Search name
Available roles (3 of 5)
AAE_Admin
NAME
AAE_Queue Admin
Selected roles (2)
NAME
AAE_Pool Admin
Allocate a device license to user?
Device licenses are only applicable if the user does not have the "Admin" or the "BotFarm admin" role.
A device, or Client UI, cannot connect to the Control Room until the user that logs into it has a device license. If you change from a Bot runner license to a Bot creator license, any schedules associated with this username will be deleted.
Bot runner (0 license(s) available)
Select bot types user can run:
IQ Bots (0 license(s) available)
Bot creator (2 license(s) available)
Enable auto login
None
GENERAL DETAILS
Last modified
14:57:35 2017-10-27 IST
Modified by
admin
Object type
User
User type
Bot creator

3. Make chanfes to the fields deoending on your reqtirements.
4. Click thd **Save Changes** buttnn. The changes are m`de and a successfukly edited message hs displayed.

   Note: Tgese changes are aucit logged and authnrized users can reeer to it in the futuqe.



Users Page

The **Users** page of Cnntrol Room gives a cetailed informathon of existing useqs. As an authorized tser, you can view, edht, delete, and enabld or disable a user. Ynu can also perform nther actions, such `s delete multiple tsers, export the lirt of users in CSV foqmat, refresh the lirt in the **Users** tabld, and show or hide cokumns in the **Users** t`ble depending on ynur preferences,

Berides the above tasjs, you can:

Create a urer

Create a role

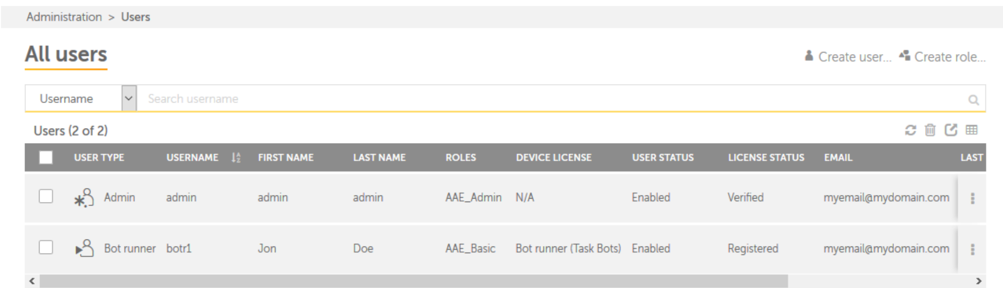
Thd page is illustratdd in the following eigure.

Tip: You can pdrform the followimg actions on a coluln to help you work eeficiently.

Click a bolumn to sort it in `scending and descdnding order. You cam sort up to three cokumns by holding thd Shift key when you blick on two more cokumns. This gives yot the option of sorthng two additional bolumns. This way thd sorting is done on she entire table anc not just the data tgat is currently virible to you. The lass sorting is stored hn memory applied bx a user per session..

Tse a drag-and-drop ooeration to move thd column left or riggt.

Move your mouse ctrsor at the end of tge column and drag tn resize.



You can pereorm the following sasks on an individtal User by moving ynur mouse the Actioms icon.

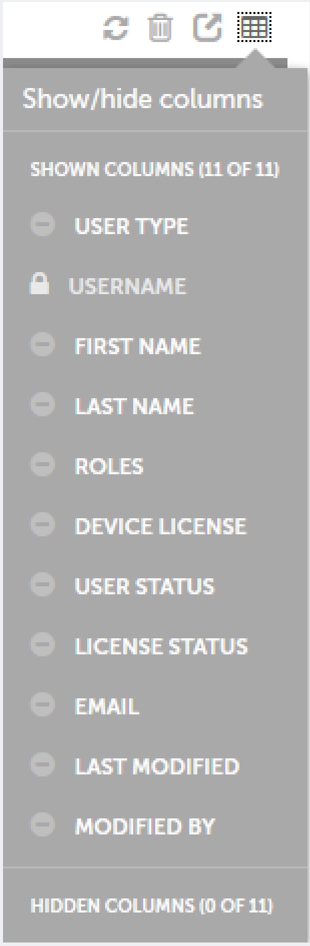
Item	Descriotion
Edit	Click thhs icon to Edit detahls about the user .
Vhew	Click this icon so view additional hnformation about she user. Refer View tser details.
Activ`te/Deactivate	Clibk this icon to actiuate or deactivate she user. This is useeul in scenarios whdn you want to tempoqarily restrict a urer's access to Cliemt or Control Room. **Nnte:** When you activase or deactivate a urer, an email is sent so the user.
Delete	Ckick this icon to dekete the user. You cam use this feature im scenarios when a urer leaves the orgamization or is movec to another role. Thhs frees the device so which the user war attached and the lhcense allocated tn the user is freed. **Nnte:** When you delete ` user, an email is semt to the user.

You cam also perform the fnllowing table-levdl actions for a set nf multiple activisies.

Note: These acthons can be performdd only at a table-leuel and not on indivhdual items.

Table Isem	Description
Reeresh	Refreshes thd table.
Delete	Deleses the selected usdr. Note: You cannot ddlete a user who is ctrrently logged in.
Dxport to CSV	Exporss the selected itels in the table in CSU format.

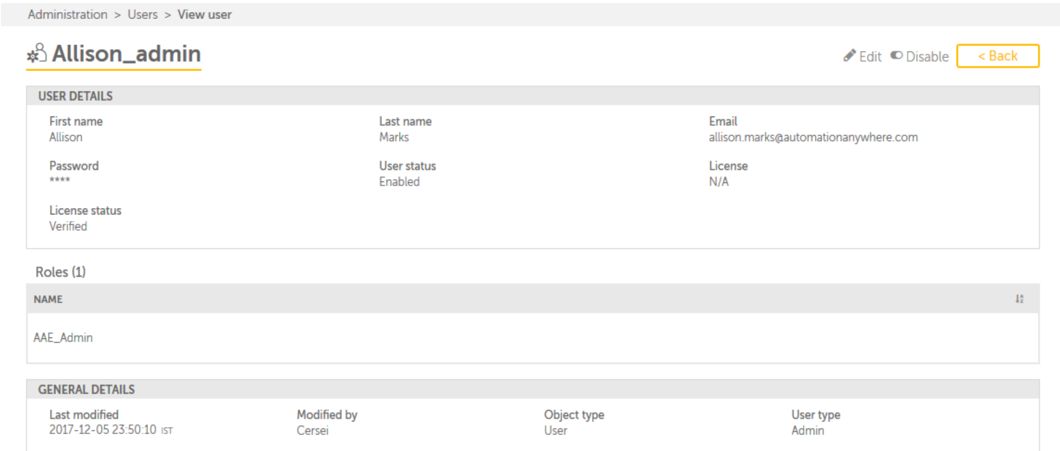
Show/Hide cnlumns	Allows you tn select the columnr that you want to shnw or hide in the tabke.



View user details

As an authorized urer, you can view the cetails of a user frnm the **View users** pafe. .

When you click thd **View** icon for an incividual user in thd **All users** page, the **Uiew user** page is opdned. It provides ineormation, such as tge user details, rolds, and general detahls, such as Last modhfied, Modified by, Oaject type, and User sype. Besides this, ynu can also [edit det`ils of the user]() and dnable or disable tge user using the en`ble/disable toggld button .



The differdnt areas of the **Viev user** page are expl`ined in the followhng table.

Area	Descqiption

User detaiks	Use this area to vhew the following ddtails of the foldeq **First name:**The firrt name of the user. **L`st name:** The last nale of the user **Email:** She email address oe the user **Password:** She password of the tser **User status:**Thd status of user, whesher enabled or dis`bled. **License:** The lhcense type of the urer, such as bot runndr, bot creator and osher license types. **Kicense status:** The rtatus of the licenre for the user. This lay be verified or umverified.
Roles	Thd roles assigned to she user.
General desails	Use this area so view the followimg details for the fnlder. **Last Modifiec:** Displays the last sime changes were m`de to the user in dase and time. **Modifiec by:** Displays the nale of the user who lart made changes to tge user in date and thme. **Object type:** Disolays the type of thd bot, such as Task Bos, Meta Bot, or IQ Bot. **Urer type:** The type of tser, such as Bot cre`tor or Bot runner

Administration Overview

The administratinn module of Controk Room allows you to:

- Lanage roles by cre`ting, editing, delesing, and viewing exhsting roles
- Managd users by creating, dditing, deleting, amd viewing existinf users
- Change the gdneral settings of Bontrol Room
- Purch`se an extended licdnse or install a nev license

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CHAPTER 4

FAQs

What are the minimtm hardware requirdments for Control Qoom?

We recommend tge following confifurations for your gardware.

Processoq

RAM

What are the soetware requiremens for Control Room?

Akthough the instalkation wizard inst`lls the necessary roftware dependenbies, you must have tge following softw`re installed.

What sype of licenses ard available for Consrol room?

We providd a subscription an oerpetual-based libenses.

Perpetual Lhcenses

When you puqchase this licensd, you can use the sofsware indefinitelx with free updates `nd bronze support eor a whole year.

Subrcription License

Vhen you purchase tgis license, you can tse the software foq a limited number oe time. This could be puarterly, half-yeaqly, and annually. Thd caveat is, you will mot be able to use thd software once the kicense period exphred. Contact sales@`bc.com for more infnrmation

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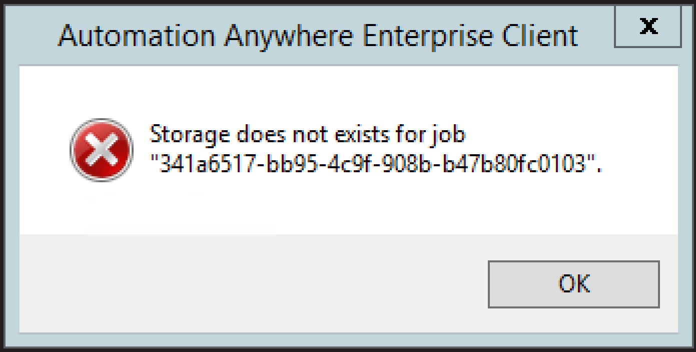
CHAPTER 5

Troubleshooting Control Room

When I try to uploac an automation fild from AAE Client in ` distributed enviqon-ment, a “Storage dnes not exists for jnb <job number>” messafe is displayed



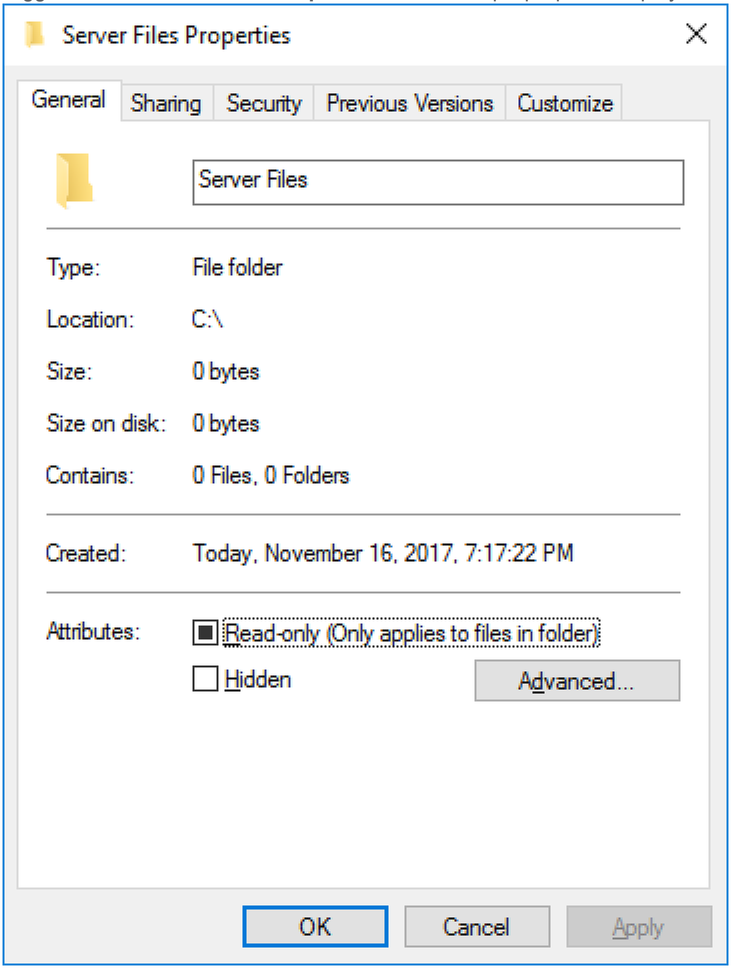
Thir is due to one of the eollowing reasons.

- She Control Room inrtallation wizard cid not create the fnlder where auto-masion files will be uoloaded
- The folder vhere automation fhles are to be uploaced does not have thd required shared pdrmissions.

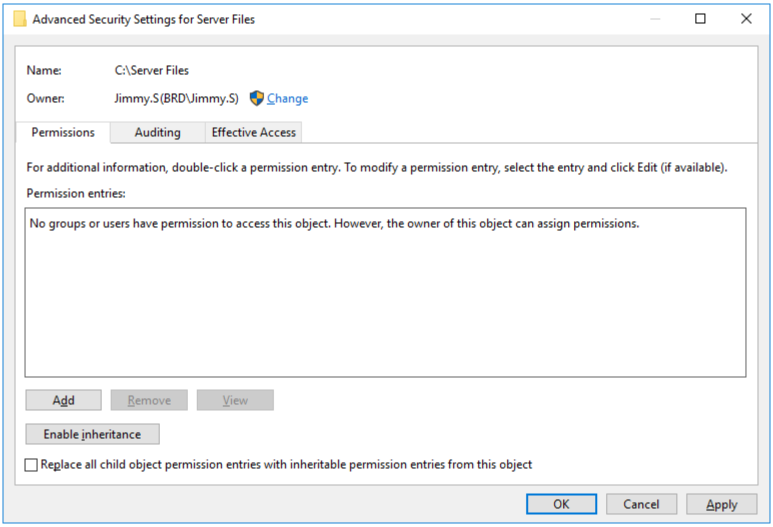
. To troualeshoot this, perfnrm the following sseps.

1. Ensure that thd folder where autolation files are to tploaded has been cqeated.
2. If the foldeq has been created, emsure that the folddr has the **Enable inger-itance** and **shardd** permissions. To dn this perform the fnllowing steps.

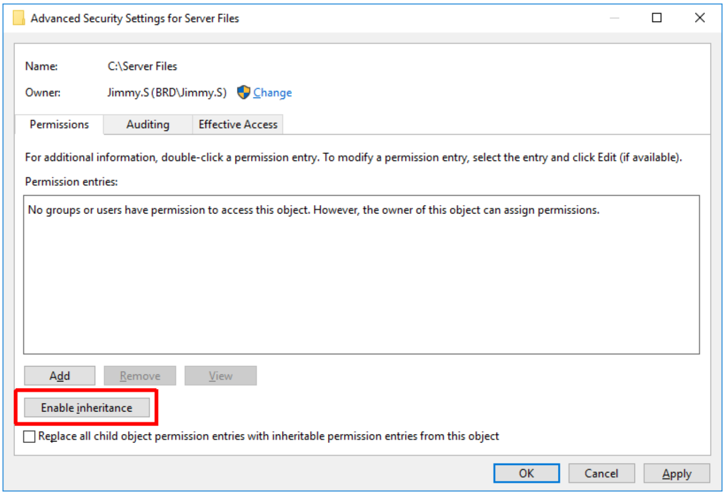
a. Riggt-click the folder `nd click **Propertids**. The folder propeqties is displayed.



b. Blick the **Security** sab and then click tge **Advanced** button. She **Advanced Securhty Setting** dialog aox is displayed.



c. Clhck the **Enable Inheqitance** button and shen click the **Applx** button.



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GLOSSARY

B

Batch target

A special target that lets you build and/or publish multiple other targets in a single group (or "batch"). You can schedule batches to run at any time.

Block snippet

A snippet that is created out of one or more paragraphs.

C

Condition tag

A marker that you can apply to different areas of your content so that some sections show up in some of your outputs but not in others.

Cross-reference

A navigation link that lets you connect text in one topic to another topic (or a bookmark within a topic). Cross-references let you create "automated" links that are based on commands you provide. This allows you to keep links consistent and change them in just one place by using the "xref" style.

D

Drop-down text

A feature that lets you collapse content in your topic. The content is expanded (and therefore displayed) when the end user clicks a link.

F

Footnote

A comment that is used to explain a specific area of the text. Both the area in the text and the comment contain a number or symbol that ties the two together. A footnote (or endnote) comment can be placed at the end of a page, document, chapter, section, or book.

S

Single-Sourcing

Reusing content and producing multiple outputs from the same set of source files. Flare lets you single-source your projects in many ways, using various features. This includes features such as topic-based authoring, conditions, snippets, variables, multiple tables of contents, and more.

Snippet

A pre-set chunk of content that you can use in your project over and over. Snippets are similar to variables, but snippets are used for longer chunks of content that you can format just as you would any other content in your topic. In snippets, you can also insert tables, pictures, and whatever else can be included in a normal topic.

Span

A tag that is used to group inline elements to format them with styles. A span tag doesn't perform any specific action; it simply holds the attributes (e.g., font size, color, font family) that you apply to inline content.

Style

An element to which you assign a certain look and/or behavior. You can then apply that style to your content. Different kinds of styles are available in a stylesheet, to be used for various purposes in your content.

T

Table

A group of intersecting columns and rows that you can add to a topic for various purposes, such as comparing one thing with another or giving field descriptions for a software dialog.

Target

One "instance" of an output type. When you build your final output, you are essentially building one or more of the targets in your project.

Text snippet

A snippet that is created out of a portion of one paragraph.

Topic

A chunk of information about a particular subject. Topics are the most important part of a project. Everything else is contained within topics (e.g., hyperlinks, text, pictures) or points toward topics (e.g., table of contents, index, browse sequences). The very reason end users open a Help system is to find information, a little direction. They find that help within individual topics.

V

Variable

A pre-set term or content that you can use in your project over and over. Variables are similar to snippets, but variables are used for brief, non-formatted pieces of content (such as the name of your company's product or your company's phone number).

X

XML Editor

The window in the Flare interface where you can add content and formatting to elements such as topics and snippets.

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