# Pega Robotics Desktop Management Console

**Version 8.0**

**USER GUIDE**

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**Notices**



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Updated: September 9, 2016

# Contents

# USING PEGA ROBOTICS DESKTOP MANAGEMENT CONSOLE

Welcome to the Pega Robotics Desktop Management Console (Management Console). This cloud-based server product from Pega provides a simple yet comprehensive way to manage the testing and implementation of the solutions you create with Pega Robotics Studio and the updates Pega periodically distributes.

# Overview

Organizations using Pega Robotics Studio — large and small, across every industry — rely on Studio to transform and accelerate critical operational processes to achieve significant efficiency gains. Management Console extends these efficiencies by enabling administrators to configure, manage and deploy Studio projects from a centralized portal. With Management Console, deploying projects is fast, flexible and secure – and without costly infrastructure.

Designed for IT administrators who need to reduce complexity and increase productivity, Management Console's web-based portal gives administrators a new level of functionality to distribute, manage and deploy projects across all business units within a few clicks. Using Management Console, users have instant access to all Runtime installations — including the ability to push updates to Pega Robotics Runtime users. Combined with collection of Runtime management reports, administrators now have the comprehensive operational insight to make updates more quickly and in a manner that is less disruptive to end users.

Management Console is a secure, reliable solution that meets today's needs and provides the scalability needed for the future.

## Zero infrastructure

More companies than ever are adopting hosted and SaaS-based solutions to run their business. Zero infrastructure means no hardware and no on-premise installation of Management Console. While implementation time is unavoidable, the scalability of Management Console supports pilot implementations and allows companies of all sizes to onboard with predictable, manageable costs.

## Deep manageability and governance

It is critical to have the ability to rapidly update Studio projects and Runtime users with ease. Management Console allows an administrator to apply changes quickly across an organization's business units. This makes updates easy to manage, access, organize, store and deploy.

- Via a simple web portal, the administrator defines the organization's hierarchical structure. The structure is composed of departments and the users assigned to these departments.
- Users are manually added or imported in mass. Users can be assigned multiple roles. These roles dictate permissions.
- A department inherits configuration settings and package assignments from the department above it in the hierarchy.
- Individual Runtime users inherit the configuration settings and package assignments for their department.
- Each Runtime user can have different configuration settings and package assignments if specific exceptions are required.

# Easy package management

When changes to Pega Runtime packages are required, an administrator needs a fast and easy-to-maneuver solution to deploy changes throughout the enterprise. Management Console makes it possible to rapidly deploy package updates.

- Once a project is designed and built, the administrator can publish it as a package with just a few clicks in Management Console.
- Stored in Management Console, a package can be assigned and deployed across different departments in various stages.
- Packages can be deployed automatically without involving IT resources.
- Package assignment is inherited from the department defined in Management Console.
- Administrators can easily override package assignments at the individual or department level.

# SaaS-based user maintenance

Routine updates and user maintenance can be time-consuming when manual updates on each workstation are required. Management Console is a SaaS platform and is designed to provide rapid deployment of project and configuration updates — enabling program changes to be delivered directly to each Runtime user. This eliminates the need to install updates at each workstation, saving time and conserving IT resources. The intuitive, user-friendly Management Console enables any administrator to plan and execute changes with little or no IT involvement.

- Updates are distributed in the background and are imperceptible to users.
- Intelligent customization options enable administrators to choose the right time to push updates and schedule them in advance.
- Selectively push out new versions to specific groups of users.

# Simple configuration

Using Management Console, administrations have the ability to add, display and maintain all configuration settings for each Runtime user. Through Management Console, the administrator can turn logging on and off with just a few clicks. In addition to enabling logging, an administrator is able to activate high-level events. This level of control delivers unprecedented degree of remote management and configuration, saving time and money.

# Ironclad security

Management Console employs a series of multi-layered security protocols designed to ensure secure data transfer, data integrity and confidentiality. Management Console does not transmit or store client data in any way. Configuration and Studio project data are the only types of data that are transmitted and stored. Pega protects this data through a rigorous combination of infrastructure, procedures and industry best practices, which include:

- Hosted dedicated servers in a data center with 24-hour physical security. This facility is strictly monitored using keycard protocols, and continuous surveillance.
- Employs a proven SSL technology to encrypt all data transfers and sessions between your systems and Pega servers.
- Data center backups and redundancy deliver guaranteed uptime as the data backups are replicated and stored in different locations.
- Hierarchical, role-based security with multiple levels of access permissions.
- Single sign-on for managing access to the server and data as part of your corporate log-in credentials.
- By invitation, permission-based controls for access to the server user interface (UI) and data.
- Comprehensive auditing provides visibility into system and data changes.
- Security Monitoring and Intrusion alerts for all servers and server traffic.
- Internal and Third-party security testing and assessments.

# Restore and recover

Operational continuity is critical to driving the organization – down time is not an option. Companies today expect maximum up-time and high availability. Management Console data is backed up daily and can be restored in just 15 minutes. In addition, administrators have the ability to grant temporary access to their server instance to Support Engineers who can assist in troubleshooting issues. This maximizes up-time and ensures each organization is operating at full throttle.

# Requirements

Being a cloud-based technology, the system requirements for running Management Console are minimal. You just need a device with a supported browser, like Internet Explorer or Mozilla Firefox. This table shows the browsers Pega uses in testing the Management Console:

| Component | Pega tests with |
|---|---|
| Browser | Internet Explorer version 9<br>Mozilla Firefox version 34<br>Google Chrome version 40 |
| Resolution | 1024x768 |

For more information about the system requirements for other Pega products managed by the Management Console, see their respective installation guides, available from the Support Center:

| For | See |
|---|---|
| Runtime | Runtime Installation Instructions |
| Studio (stand-alone) | Studio Installation Instructions |
| Studio (plug-in) | Studio Plug-in Installation Instructions |

# Terminology

## active

Users are either active or inactive. For historical reporting purposes, you cannot delete a user from the system, but you can mark a user inactive and you can also move inactive users into a separate department.

## CommonConfig.xml file

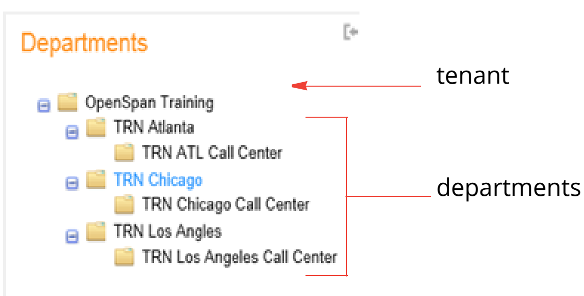
This configuration file is copied to user's computers when Studio and Runtime are first installed or updated to version 6.1 or higher. This file contains information necessary to connect to and work with Management Console and is usually found in these locations:

| Operating system | Path to the CommonConfig.xml file |
|---|---|
| Windows 7 | C:\ProgramData\OpenSpan\CommonConfig.xml |
| Windows XP | C:\Documents and Settings\All Users\Application Data\OpenSpan\ CommonConfig.xml |

See also RuntimeConfig.xml, StudioConfig.xml, and "Connecting to Studio and Runtime" on page 65.

## departments

This refers to the organizational divisions within each tenant. For instance, this example shows a departmental hierarchy with several layers of subdepartments:




In the example, OpenSpan Training is the tenant and TRN Atlanta, TRN Chicago, and TRN Los Angeles are departments of that tenant. The divisions within each department, such as ATL Call Center are subdepartments, as are the teams in each division.

## deployment level

Denotes the various stages a Studio solution goes through as it moves from development to production. The first and last stages, Development and Production, are built into the system for you. You can define any intermediary stages you need, such as stages for testing and staging.

## developer users

This refers to users who will be creating solutions with Studio, either the stand-alone or plug-in version, for use with Runtime. These users will have both Studio and Runtime on their computer.

Contrast with Runtime-only users.

## fetching

The process of first verifying and then downloading updated packages. This process is performed by Updater.

## inheritance

To Management Console, inheritance is applicable in two areas:

- Making package assignments
- Customizing the RuntimeConfig.xml configuration file

For instance, inheritance means that when you are placed in a department, you will inherit the package assignments and configuration settings made for that department. Conversely, if you leave that department, you would disinherit those assignments and settings.

## members

Members and users are synonymous in the Management Console. You define each member or user, then assign roles, departments, packages, and Runtime settings.

## ows

OpenSpan Web Services. You will see *ows* in the URL specified in the baseURL property in the CommonConfig.xml file which is used to connect to Management Console. These web services let you communicate with Management Console and other, future product offerings.

## package

A package is a deployable solution ready to be used by Runtime. A deployment package is comprised of two files, with these extensions: .openspan and .manifest. The .openspan file contains the specific adapter, translators, and custom components that make up the solution. The .manifest file contains a list of the contents of the .openspan file, along with project version information.

## project

Studio bundles functionality in project items. Project items let you integrate applications, monitor events, and automate tasks. Adapters, automations, and global containers are stored as .os and .xml files in the solution and project folders.

## RuntimeConfig.xml

The RuntimeConfig.xml file contains the configuration settings primarily used by Runtime. Runtime is installed as a stand-alone application and also with a Studio installation. While you can use any XML file editor to make changes to this file, the Management Console provides a way to edit this file which shows you where various settings were defined.

The first time you run Studio or Runtime, the system copies this configuration file from the installation directory to the location you defined in the ConfigurationLocation setting in the CommonConfig.xml file.

For ConfigurationLocation, you can enter absolute paths, environment variables, and SpecialFolders enumerated values, such as CommonApplicationData, LocalApplicationData, Documents, Personal, or Temporary. The default is ApplicationData.

Here are some examples of the actual paths represented by the most commonly used variables:

| Variable | Path |
|---|---|
| For Vista, Windows 7, and Server 2008 | |
| ApplicationData | \Users\<userName>\AppData\Roaming |
| CommonApplicationData | \ProgramData |
| LocalApplicationData | \Users\<userName>\AppData\Local |
| For Windows XP and Server 2003 | |
| ApplicationData | \Documents and Settings\<userName>\Application Data |
| CommonApplicationData | \Documents and Settings\All Users\Application Data |
| LocalApplicationData | \Documents and Settings\<userName>\Local Settings\Application Data |

**Note** If there is no RuntimeConfig.xml file in the directory you specified with the ConfigurationLocation setting, the system copies the RuntimeConfig.xml file from the installation directory. If the RuntimeConfig.xml file is also missing from the installation directory, Runtime will not start.

See also CommonConfig.xml file and StudioConfig.xml.

## RuntimeLauncher

This tool checks for and applies configuration changes, package updates and, if necessary, installs updates before it launches Runtime. This tool is installed with Updater.

## Runtime-only users

This refers to users who only use Runtime and do not use other Pega products like Studio or Management Console.

Contrast with developer users.

## solution

Within Studio, solutions and projects are containers for all of the items required to build and run the project. Solutions can include multiple projects. Once you deploy a solution to Management Console, it is known as a package.

## StudioConfig.xml

The StudioConfig.xml file contains the configuration settings used by Studio. See also CommonConfig.xml file and RuntimeConfig.xml.

## subdepartments

This label is applied to the departmental divisions within a department. See departments for more information.

## tenant

Each client or organization is known as a *tenant* in a cloud-based server environment. See departments for more information.

## User Principal Name (UPN)

In Windows' Active Directory, a UPN is the name of a system user in an email address format, such as:

```
UserName@InternetDomain
```

This can be the email address, but it does not have to be.

## version

This refers to a specific version of the software. For instance, the current version of Runtime could be 7.1.76.0.

# Getting started

Management Console lets you quickly define your organizational structure, import user information, assign packages, and customize the Runtime configuration. You can then easily deploy solutions from Studio to a secure, cloud-based server that is accessible to all of your Runtime users.

This topic helps you get started using the Management Console and includes the following topics:


- "Signing in" on page 10
- "Getting oriented" on page 12
- "Defining your organization" on page 13
- "Forgot your password?" on page 15


## Signing in

Pega will send a sign in invitation to the person you choose as your site administrator. Once this initial administrator user is set up, you can begin defining your organizational structure and setting up user information. For more information, see "Defining your organization" on page 13.

As you set up users, you can automatically send activation instructions via email which will guide each new user through the initial sign in process. The following instructions apply once a user has completed the initial sign in process.

To sign in to Management Console, follow these instructions:

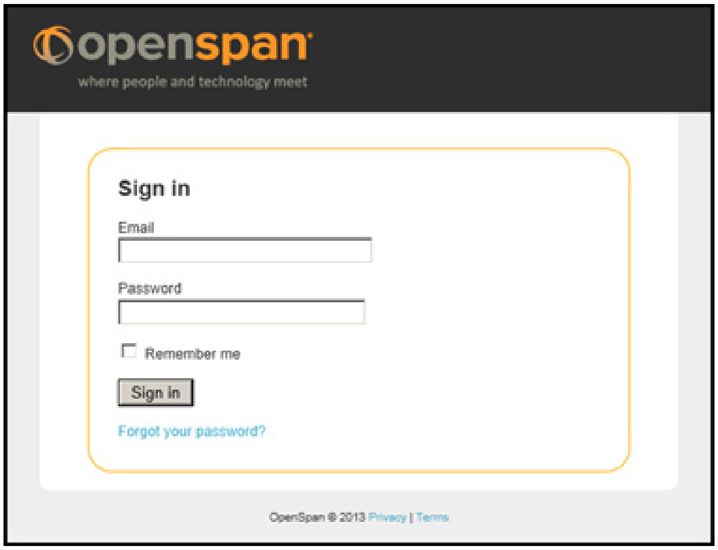
| Note | To exit Management Console, see "Exiting the console" on page 17. |
|---|---|

1. Open a browser.
2. Enter the address to your site. Here is an example:

   https://ows.openspan.com/omc/(*your company name*)

| Note | This URL is case-insensitive and will typically be lowercase. |
|---|---|

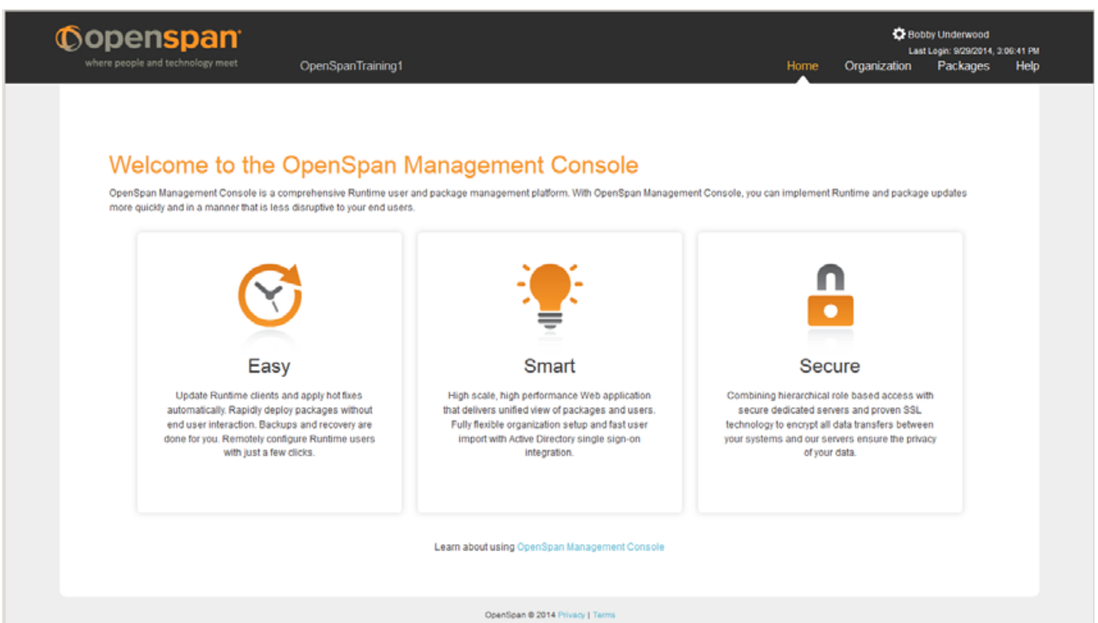
   The Sign In page appears:




3. Enter your email address and password and click the Sign In button.

| Note | If your password has expired, you will be prompted to change it. If you are using Active Directory Federation Services (ADFS) for authentication, the expiration interval is controlled by ADFS. If you are using the email/password method of authentication, your password will expire after 30-day intervals, to comply with security compliance standards.<br>If you forget your password, see "Forgot your password?" on page 15 for more information.<br>After five failed sign in attempts in a row, your account is locked for one hour. |
|---|---|

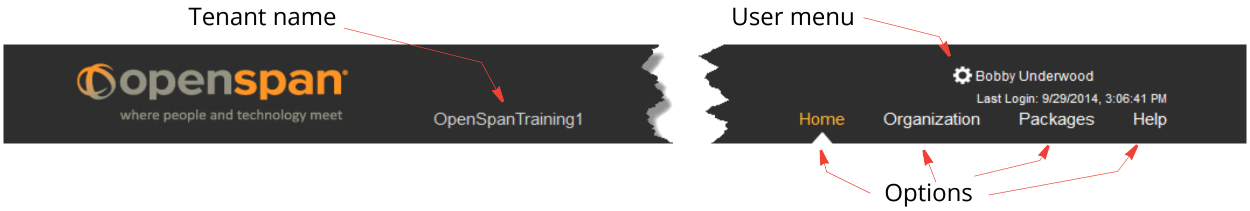
Management Console's home page appears:




You are now signed in to Management Console.

# Getting oriented

You can find more information on the Home page and other options in this manual, but first, let's take a closer look at the banner which appears on all main pages:



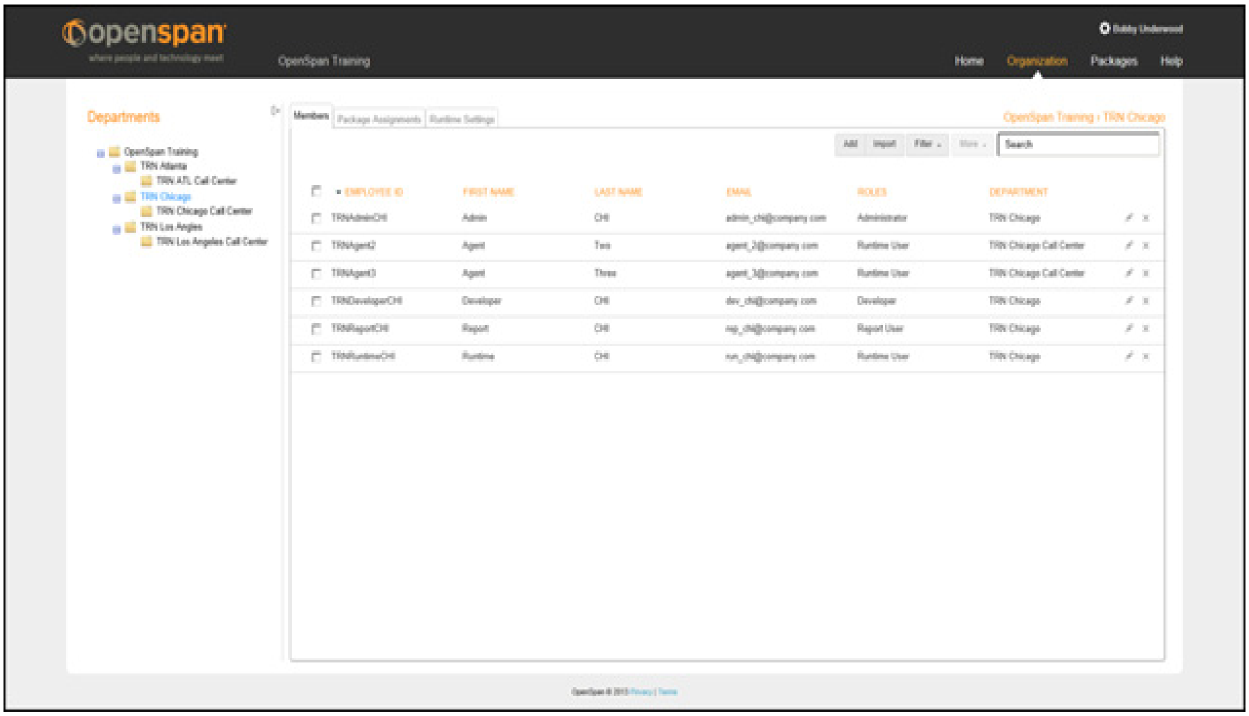

All of the main tasks you can perform with the Management Console are available from the banner.

| Item | Description |
|---|---|
| Tenant | Here you see the name of your organization. |
| User menu | Click the Cog icon to edit your profile or sign out.<br>For more information, see "Using the User menu" on page 16. |
| Home | The Home page appears after you sign in. From this page you can choose to work with the Organization, Packages, and Help options or click on the Cog icon to edit your profile or sign out. |
| Organization | Click this option to define and manage departments and users.<br>Defining your departments and users is typically the first tasks you perform with Management Console. For additional information, see "Defining your organization" on page 13. |
| Packages | Click this option to manage packages through the various deployment levels you set up. This is where you activate, deactivate, and promote packages.<br>For more information, see "Managing packages" on page 39. |
| Help | Click this option to access the documentation, go to the Support Center, go to the Community forum, and grant access to your server portal.<br>For more information, see "Getting Help" on page 63. |

# Defining your organization

The first step you must do is to define your organization. This includes defining the members or users who will use Studio solutions, defining the departments to which they belong, assigning the packages they will use, and customizing their Runtime settings.

All this is done from the Organization page, which appears with the Members tab active when you click the Organization option:

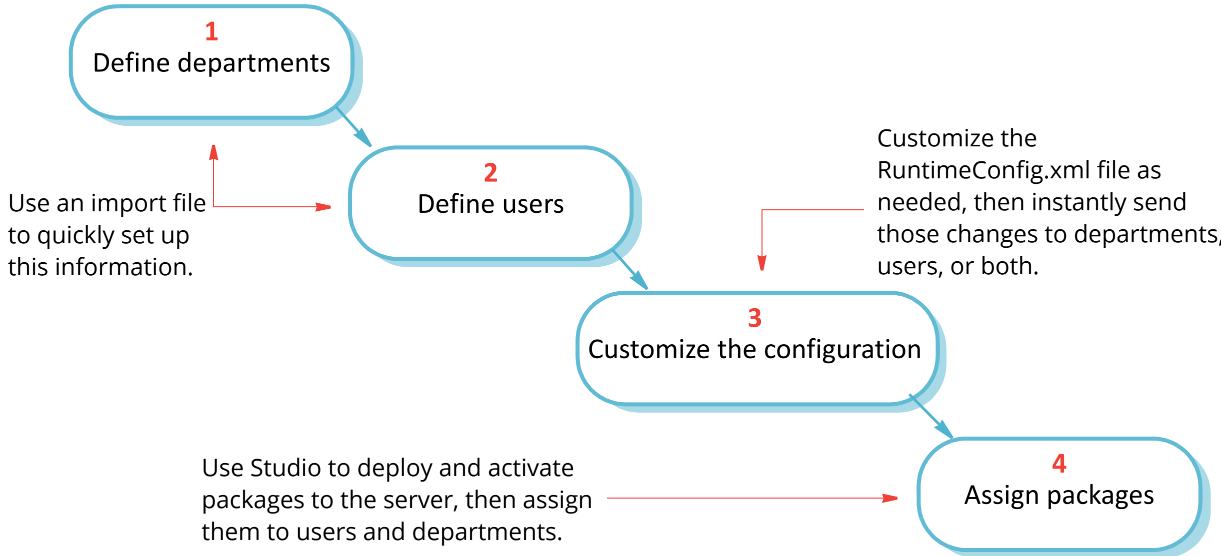



This page shows a departmental hierarchy on the left and these tabs on the right:

| Tab | Click this tab to... |
|---|---|
| Members | Add or import user information, mark users inactive, reactivate users, and reset passwords. |
| Package Assignments | Make package assignments. These assignments determine which Runtime users get the various solutions developers create with Studio. |
| Runtime Settings | Customize the configuration settings for Runtime in the RuntimeConfig.xml file. |

| Note | You can also assign packages and customize a user's Runtime settings when editing a user's information. See "Editing user information" on page 31 for more information. This lets you see an audit log for the user. |
|---|---|

Typically, you will define your organization in this order:




| For more information on | See |
|---|---|
| Defining departments | "Adding departments" on page 19 |
| Defining users | "Adding users" on page 24 |
| Importing departments and users | "Importing department and user information" on page 26 |
| Customizing the configuration | "Customizing the RuntimeConfig file" on page 59. |
| Assigning packages | "Assigning packages" on page 50 |

The import file must be in a comma-separated value (CSV) format.

# Forgot your password?

No problem, just follow these steps:

1. From the Sign In page, click the Forgot your password? link.


Click here if you have forgotten your password.

The Forgot Your Password page appears.

2. Enter your email address and click the Send Me Reset Password Instructions button.


You will receive an email with further instructions.

# Using the User menu

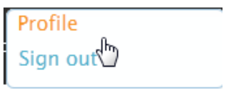
You can click the cog icon to access the user menu to edit your profile and to sign out of the console.

## Editing your profile

Follow these steps to make changes to your profile information.

1. Click the Cog icon beside your name:

2. Choose the Profile option.




3. Enter the following information to edit your profile:

| Field | Description |
|---|---|
| First name | Enter your first name. You can enter up to 25 characters. |
| Last name | Enter your last name. You can enter up to 25 characters. |
| Email | Enter your email address. Here is an example:<br>Firstname.Lastname@openspan.com<br>You can enter up to 255 characters.<br>**Note**: The Management Console adheres to the RFC 2822 standard for Internet message formats. |
| UPN | Enter your User Principal Name (UPN). In Windows' Active Directory, a UPN is the name of a system user in this format:<br>UserName@InternetDomain |
| New password | Enter the new password you want to use. Your password must meet this criteria:<br>• Must contain at least eight characters.<br>• Must include at least one lowercase letter, one uppercase letter, and one numeral.<br>• May not be one of your last six passwords.<br>• Must be changed at least once every 30 days. |
| Confirm new password | Reenter the new password to confirm it. |

4. Click Save to save your changes.

# Exiting the console

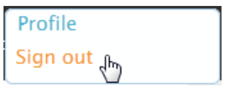
Follow these steps to sign off.

| | |
|---|---|
| Note | Follow these steps to sign off Management Console. Merely clicking the **X** icon to close the tab in your browser *does not* sign you out.<br>Your session will, however, expire automatically if it is inactive for 60 minutes. You will then have to sign in again. |

1. Click the Cog icon beside your name:

2. Choose the Sign out option.

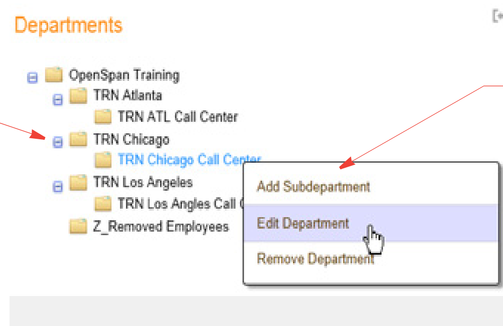
   
   

You have now exited Management Console.

# Managing departments

Your departments appear in a Windows Explorer-like hierarchy which you can hide, show, expand, and collapse. You can also drag and drop departments, their subdepartments, and their users to reflect changes in your organization.

Click here to expand or collapse the departmental hierarchy for the TRN Chicago Call Center.




Right-click on a department to add, edit, or remove departments.

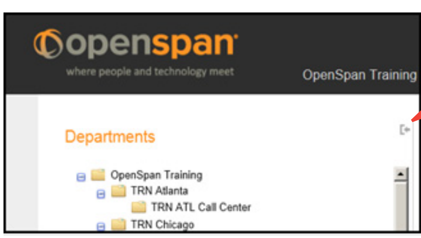
When you click on a tenant, department or subdepartment, the associated users appear on the right.

Management Console lets you perform these department-related tasks:

- "Hiding and showing departments" on page 18
- "Adding departments" on page 19
- "Editing department information" on page 20
- "Moving departments" on page 21
- "Customizing a department's Runtime settings" on page 21
- "Removing departments" on page 22

## Hiding and showing departments

When the Organization page opens, your departments are shown on the left of the page. You can hide the display of your departmental hierarchy by clicking the Hide Departments link:



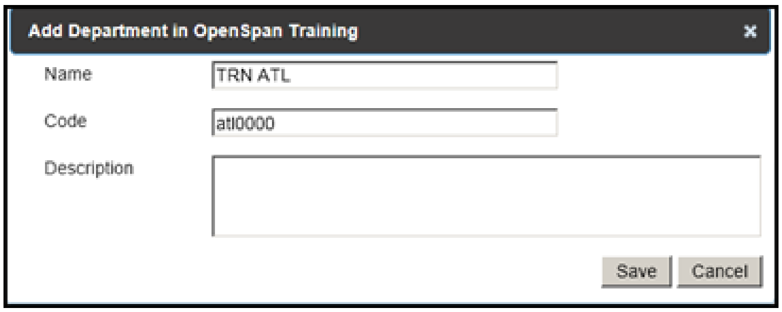

Click here to hide or show the departmental hierarchy.

Once hidden, you will see a Show Departments link on the page. Click this link if you want to show the department hierarchy.

# Adding departments

Follow these steps to create a department:

1. Click the Organization option.
2. Right click on the parent department and choose the Add Subdepartment option. The Add Department window appears.




3. Enter the following information to define the department:

| Field | Description |
|---|---|
| Name | Enter the name of the department.<br>You can enter up to 50 characters, including spaces, such as *TRN ATL*. You can also include numbers, underscores, dashes, parentheses, quotation marks, apostrophes, ampersands (&), and at signs (@).<br>This name is case sensitive. |
| Code | Enter the code assigned to the department.<br>This code uniquely identifies the department and lets you handle situations where you have departments with the same name in multiple locations. For instance, you could have an IT department in both Atlanta and Denver and use codes of *ITAtlanta* and *ITDenver*.<br>You can enter up to 25 letters and numbers. Omit spaces from the code. This code is case insensitive. |
| Description | (Optional) Enter a description of the department. You can enter up to 255 characters.<br>This description is for your benefit only, to help you identify the department or to note important information about the department. You can include numbers, underscores, dashes, parentheses, quotation marks, and apostrophes. |

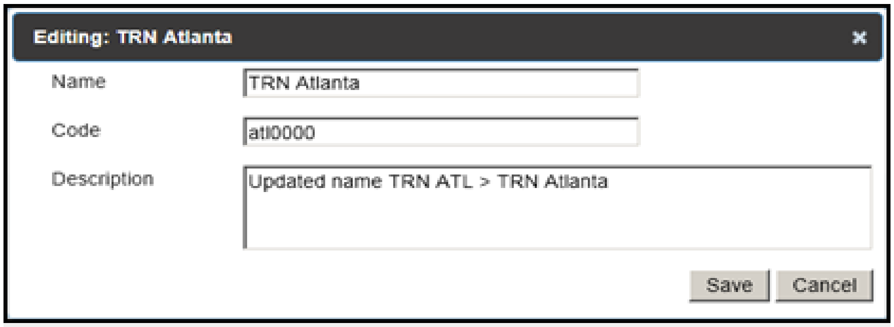
4. Click Save to add the department.

For reporting purposes, you cannot delete a user, you can only deactivate a user. To handle users who leave your organization permanently, create a department called, for instance, *Sacked*, and drag and drop those users into that department.

# Editing department information

Follow these steps to edit the information about a department.

1. Click the Organization option.
2. Highlight a department, right-click, and choose the Edit Department option. The Edit Department window appears.




3. Modify this information as needed:

| **Field** | **Description** |
|---|---|
| Name | The name of the department.<br>You can enter up to 50 characters, including spaces, such as *IT Department - Atlanta*. You can also include numbers, underscores, dashes, parentheses, quotation marks, apostrophes, ampersands (&), and at signs (@).<br>This name is case sensitive. |
| Code | The code assigned to the department.<br>This code uniquely identifies the department and lets you handle situations where you have departments with the same name in multiple locations. For instance, you could have an IT department in both Atlanta and Denver and use codes of *ITAtlanta* and *ITDenver*.<br>You can enter up to 25 letters and numbers. Omit spaces from the code. This code is case insensitive. |
| Description | (Optional) A description of the department. You can enter up to 255 characters. You can include numbers, underscores, dashes, parentheses, quotation marks, and apostrophes.<br>This description is for your benefit only, to help you identify the department. |

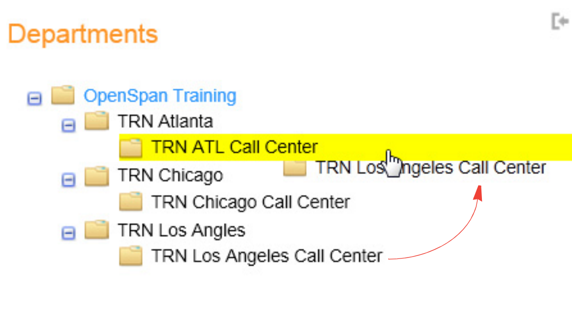
4. Click the Save button to save your changes.

# Moving departments

You can easily move subdepartments from one department to another by dragging and dropping the subdepartment into its new location. Keep in mind the users assigned to the subdepartment stay with it.

Follow these steps to move subdepartments to another place in your organizational structure:

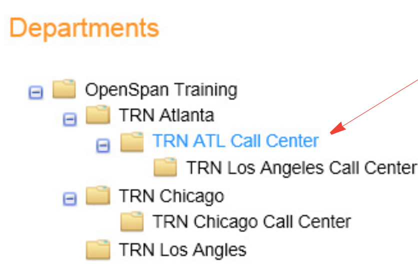
1. Highlight the subdepartments you want to move.
2. Drag those departments to the new location. The system highlights the target department.




Grab the department you want to move and drag it to the location you want to move it to.

Here we are making the TRN Los Angeles Call Center subdepartment a subdepartment under the TRN ATL Call Center subdepartment.

3. Release the mouse button to drop the subdepartments under the highlighted department.




The TRN Los Angeles Call Center subdepartment is now a subdepartment under the TRN Atlanta subdepartment.

# Customizing a department's Runtime settings

You can highlight a department and click on the Runtime Settings tab to modify settings in the RuntimeConfig.xml file for all of the users in that department. For more information, see "Modifying a department's configuration" on page 60.

# Removing departments

When you remove a department, the system deletes all information about that department.

Keep in mind that you cannot remove a department which contains users. If you need to remove a department which still contains users, first drag and drop those users into another department. If necessary, create a dummy department to temporarily contain those users.

Follow these steps to remove a department.

1. Click the Organization option.
2. Highlight a department, right-click, and choose the Remove Department option. A message appears to let you confirm the deletion.

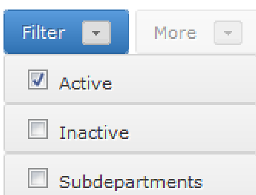
# Managing users

From the Members tab on the Organization page, you can perform the following tasks:

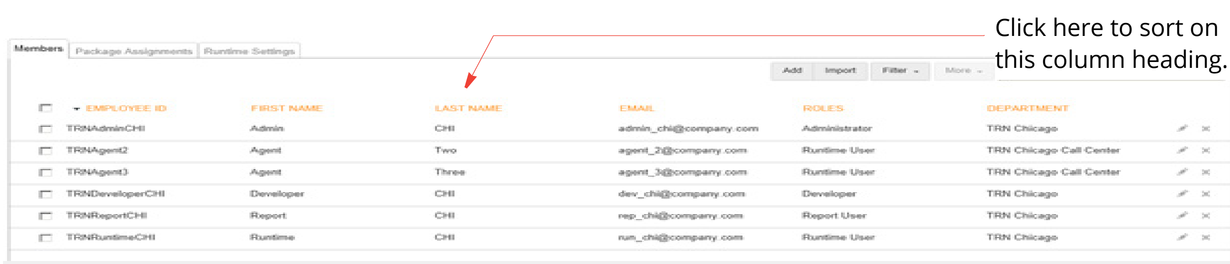

- “Filtering, sorting, and searching for users” on page 23
- “Adding users” on page 24
- “Importing department and user information” on page 26
- “Adding roles” on page 28
- “Deleting roles” on page 30
- “Editing user information” on page 31
- “Resetting a single user’s password” on page 35
- “Resetting multiple user’s passwords” on page 36
- “Deactivating users” on page 36
- “Reactivating users” on page 37


## Filtering, sorting, and searching for users

To help you more easily locate users, the system lets you filter the list to display only Active, Inactive, or All users:




Furthermore, you can click on column headings to sort the list of users, based on that column. For instance, clicking on the Last Name column heading lets you do an alphabetic sort on last names:




To search for a specific user, just click in the search box and start typing. The system performs a partial search, using all columns of information, as you type.

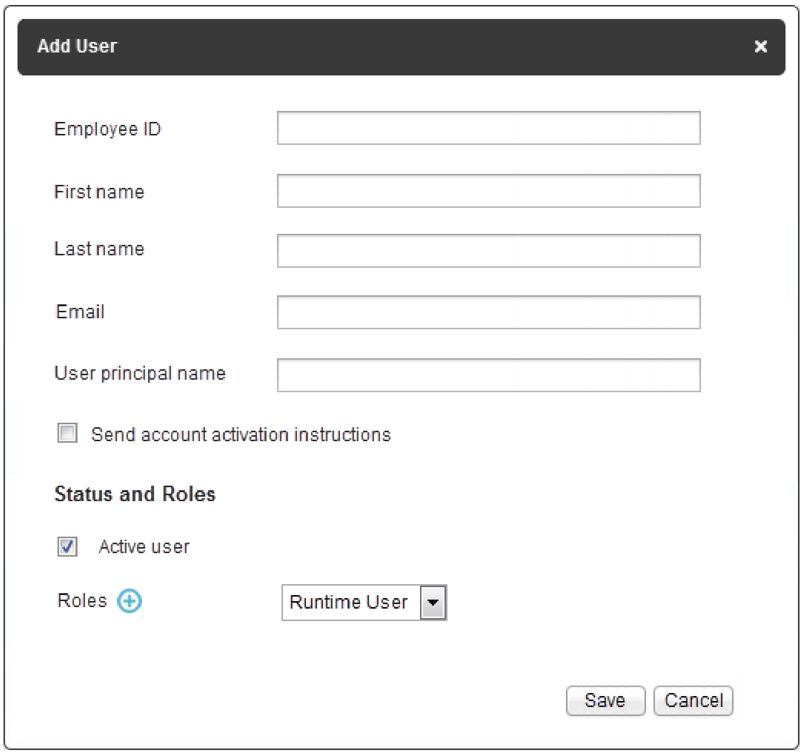
# Adding users

Typically, your organization will designate a single administrator user who will then be set up by Pega. This user receives the initial access to Management Console and typically handles setting up departments and users.

The departments and users who comprise your organization are usually added via an import file from your system of record. This approach lessens the chance for errors and takes less time.

If, however, you need to create a member (user), follow these steps:

1. Click the Organization option. Then click the Members tab.
2. Click the Add button. The Add User window appears.




3. Enter the following basic information to define the user:

| Field | Description |
|---|---|
| Employee ID | Enter the user’s employee ID.<br>You can enter up to 25 characters. You can include letters, numbers, dashes, underscores, parentheses, apostrophes, and spaces<br>This ID is case insensitive. |
| First name | Enter the user’s first name.<br>You can enter up to 25 characters. You can include letters, numbers, dashes, underscores, parentheses, apostrophes, and spaces. |

| Field | Description |
|---|---|
| Last name | Enter the user's last name.<br>You can enter up to 25 characters. You can include letters, numbers, dashes, underscores, parentheses, apostrophes, and spaces. |
| Email | Enter the user's email address. Here is an example:<br>Firstname.Lastname@openspan.com<br>You can enter up to 255 characters, including letters, numbers, periods, dashes, underscores, apostrophes, and plus signs (+).<br>**Note**: Management Console adheres to the RFC 2822 standard for Internet message formats. |
| User principal name | Enter the name of the domain (UPN) the user logs on to. |
| Active user | Check this box if the user is active. Remove the check mark to deactivate the user.<br>**Note**: Deactivated users are grayed. |
| Send account activation instructions | (Optional) Check this box if you want the system to send an email to the user which includes activation instructions. Remove the check mark to not send the email. |
| Roles | Select the roles assigned to this user. You can choose from these roles:<br>• Administrator<br>• Developer<br>• Report User<br>• Runtime User<br>• OSI Super Admin<br>You can click the Add icon to add additional role assignments to a user. See "Adding roles" on page 28 for more information.<br>If you want a user to have different roles for testing purposes, such as an Administrator also having a Runtime User role, set up two users.<br>**Note**: The OSI Super Admin role is only used with Workforce Intelligence. |

4. Click the Save button to add the user.

# Importing department and user information

To quickly add or update user information, you can import user information from a comma-separated value (CSV) file and add them to your organization.

*Always* use your system of record, whether it is a Human Resources system, a payroll application, or some other application, as the source for user information. This will ensure you have the most up-to-date information in Management Console.

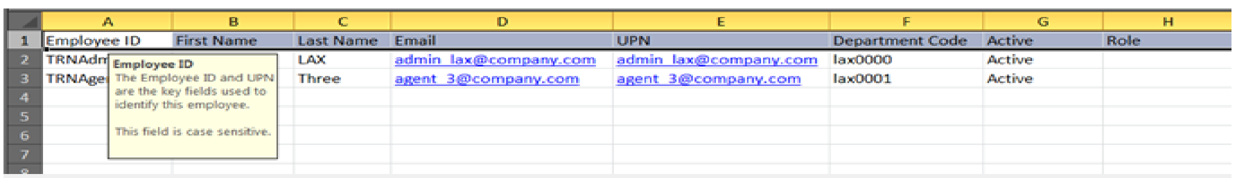
| Note | You can set up your department hierarchy manually, then import user information into that hierarchy or you can import the user information and then arrange the departments to reflect your organization's structure.<br>If you choose to import first, the system places all of the departments in the import file one level below the root department. You can then drag and drop the departments as needed. |
|---|---|

## Setting up the import file

This is how you format the CSV file:

Employee ID,First Name,Last Name,Email,UPN,Department Code,Active,Role

Here is an example, as shown in a spreadsheet:



| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | Employee ID | First Name | Last Name | Email | UPN | Department Code | Active | Role |
| 2 | TRNAdm | | LAX | admin_lax@company.com | admin_lax@company.com | lax0000 | Active | |
| 3 | TRNAge | | Three | agent_3@company.com | agent_3@company.com | lax0001 | Active | |
| 4 | | | | | | | | |
| 5 | | | | | | | | |
| 6 | | | | | | | | |
| 7 | | | | | | | | |



You can find an import file template on the Support Center site. Download and use this template to prepare your import file:

omc_UserImport_template.zip

Keep in mind...

- The import is keyed on the Employee ID field.
- The entries for the UPN and Employee ID fields must be unique within the tenant.
- Each record must include a UPN, email address, or both.
- If matched, the information in the import file overwrites existing user information.

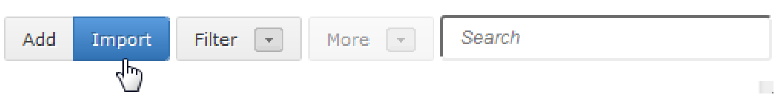
Here are some notes on specific fields:

| Field | Notes |
|---|---|
| Department Code | • Enter only letters and numbers, with no spaces, underscores, or dashes.<br>• The field is case insensitive.<br>• If this field is omitted and you are adding a user, the system adds the user at the root department node (top most department).<br>• If this field is omitted and you are updating user information, the user's department is unchanged.<br>• If this field specifies an existing department and you are updating user information, the imported value overwrites any existing value (and the user *moves* to the new department).<br>• If this field specifies a department not currently in the hierarchy and you are updating user information, the system creates a department immediately below the root node and moves the user into the new department. |
| Active | • If this field is blank and you are adding a new user, the system defaults to True (for active). Any value in the Active field is interpreted as True unless the field explicitly contains False.<br>• If this field is blank in the import file and you are updating user information, the system makes no changes to the user's active/inactive status.<br>• If this field is blank in the import file, the system defaults to Active. |
| Role | • If the import file contains a different role for the same user (based on the UPN), it adds that role to the user.<br>• If this field is blank and you are adding a user, the system defaults to Runtime User.<br>• If this field is blank in the import file and you are updating user information, the system makes no changes to the user's role assignments.<br>• If a user fills multiple roles, list that user multiple times in the import file, with a row for each role. |

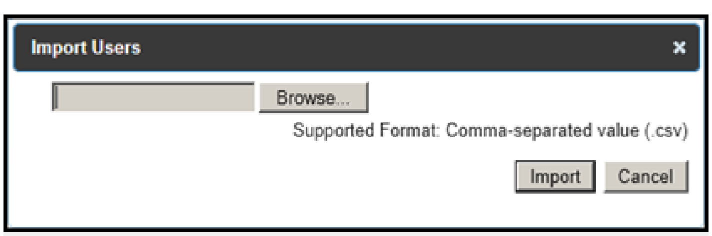
## Processing the import file

These steps tell you how to import user information.

1. Click the Organization option. Then click the Members tab.
2. Click the Import button.

   The Import Users window appears.
3. Click Browse to locate the file.

4. Once you locate the file, click the Import button. The users listed in the file are imported into the system. The system displays a progress window to show you the status of the import.

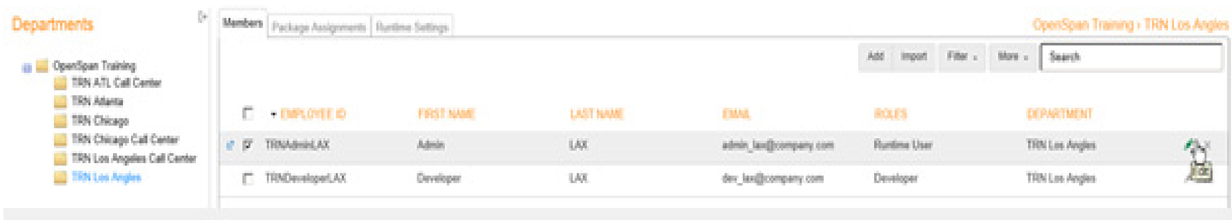
| Note | If you close progress window, the import continues in the background. |
|---|---|

# Adding roles

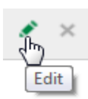
Follow these steps to add a role:

| Note | if you want a user to have different roles for testing purposes, such as an Administrator also having a Runtime User role, set up two users. |
|---|---|

1. Click the Organization option. Then click the Members tab.
2. Highlight the Department for the user is in. Then, click the check box beside the user for whom you want to add a role.




3. Click the Edit icon for that user.




The Edit User window appears.

4. Scroll down to the bottom of the window and click the Add icon.


After you click the Add icon, another Roles drop-down appears. Management Console includes these roles, which have the following permissions:

| Permission | Administrator | Developer | Report User | Runtime User |
|---|---|---|---|---|
| Use the Management Console web site | ✓ | ✓ | ✓ | |
| Grant portal access to Support | ✓ | | | |
| View restricted fields (UPN) | ✓ | | | |
| Use Studio | ✓ | ✓ | | |
| Use Runtime | ✓ | ✓ | | ✓ |
| View Runtime audit trails | ✓ | ✓ | | |
| Departments | | | | |
| View department information | ✓ | ✓ | ✓ | |
| Create departments | ✓ | | | |
| Update department information | ✓ | | | |
| Delete departments | ✓ | | | |

**Note**: The OSI Super Admin role is only used with Workforce Intelligence.

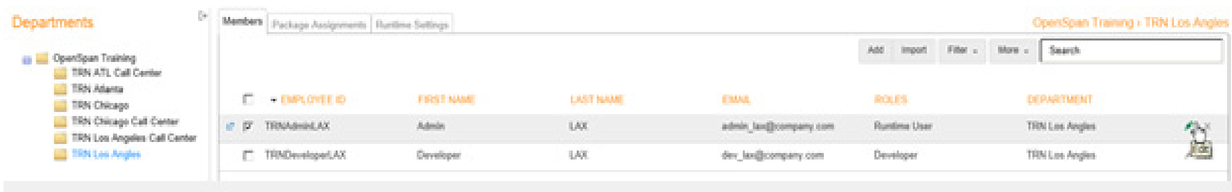
| Permission | Administrator | Developer | Report User | Runtime User |
|---|---|---|---|---|
| Users | | | | |
| Edit your user profile | ✓ | ✓ | ✓ | ✓ |
| View user information | ✓ | ✓ | ✓ | |
| Create users | ✓ | | | |
| Update user information | ✓ | | | |
| Deactivate users | ✓ | | | |
| Activate users | ✓ | | | |
| View role information | ✓ | | | |
| Create roles | ✓ | | | |
| Update role information | ✓ | | | |
| Delete roles | ✓ | | | |
| Packages | | | | |
| View a list of the available packages | ✓ | ✓ | | |
| View and run packages assigned to you | ✓ | ✓ | | ✓ |
| View all package assignments | ✓ | ✓ | | |
| Create packages | ✓ | ✓ | | |
| Update package assignments | ✓ | ✓ | | |
| Delete package assignments | ✓ | ✓ | | |
| Deploy packages | ✓ | ✓ | | |
| Promote packages (except to Production) | ✓ | ✓ | | |
| Assign packages | ✓ | | | |
| Promote packages to Production | ✓ | | | |
| Configuration | | | | |
| View your RuntimeConfig.xml settings | ✓ | ✓ | ✓ | ✓ |
| Edit RuntimeConfig.xml settings | ✓ | | | |
| Edit default Runtime.Config.xml settings | ✓ | | | |
| **Note**: The OSI Super Admin role is only used with Workforce Intelligence. | | | | |

5. Select another role for this user.
6. Click the Save button when you are finished adding roles.

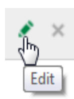
# Deleting roles

Follow these steps to delete a role assignment for a user:

1. Click the Organization option. Then click the Members tab.
2. Click the check box beside the user for whom you want to delete a role.




3. Click the Edit icon for that user.




   The Edit User window appears.

4. Scroll down to the bottom of the window and click the Delete icon.

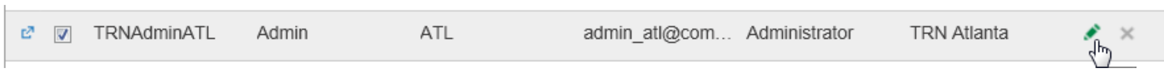

Click here to delete a role.

   The system deletes the role.

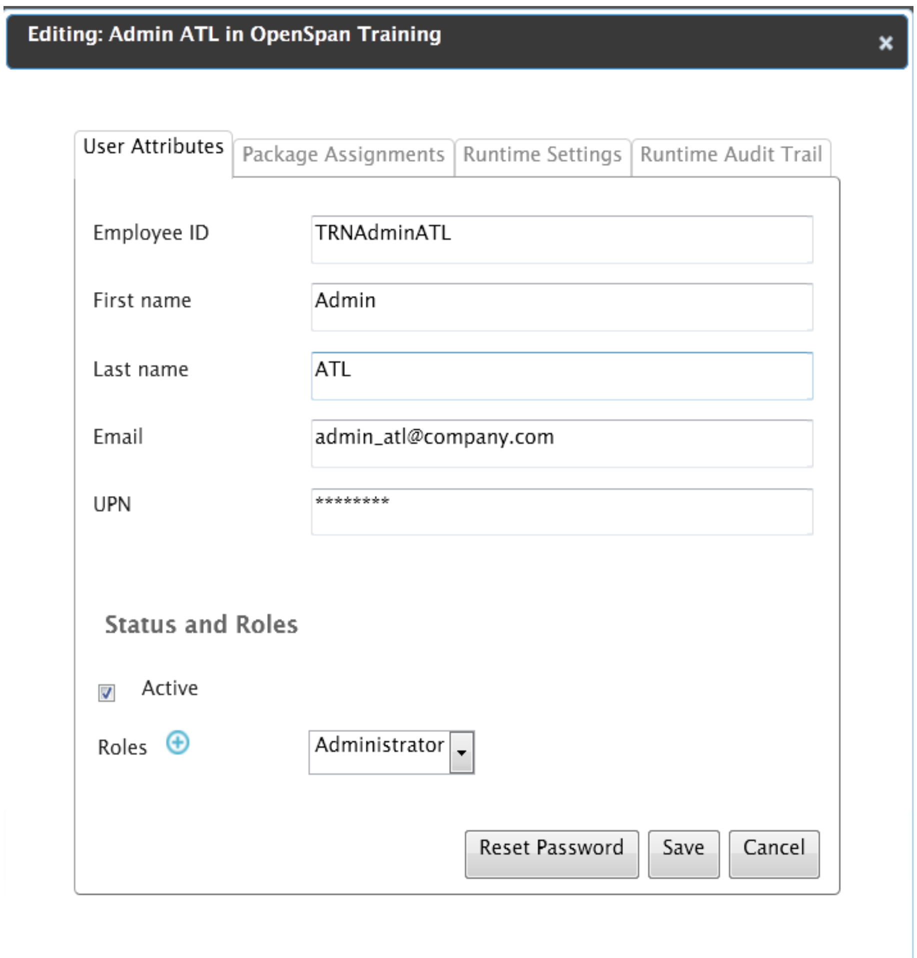
# Editing user information

You can easily edit user information by locating the user and clicking the Edit icon. Follow these steps:

1. Use the filtering, sorting, and searching options to help you find the user you want to edit. For more information, see "Filtering, sorting, and searching for users" on page 23.
2. Once found, highlight the row and click the Edit icon:




The Edit User window appears.




From this window, you can work with these tabs:

| Tab | Description |
|---|---|
| User Information | Click this tab to edit user information and reset a user's password. For more information, see "Changing user information" on page 32. |
| Package Assignments | Click this tab to assign packages to a user. For more information, see "Assigning packages" on page 33. |

| Tab | Description |
|---|---|
| Runtime Settings | Click this tab to customize the settings in the user's RuntimeConfig.xml file. For more information, see "Customizing a user's Runtime settings" on page 34. |
| Runtime Audit Trail | Click this tab to view an audit trail of certain Updater activities. For more information, see "Using the Runtime audit trail" on page 34. |

The following topics discuss what you can do on each tab.

## Changing user information

Follow these steps to change the information about a user:

1. Click the User Information tab, then make any necessary changes to the following fields:

| Field | Description |
|---|---|
| Employee ID | The user's employee ID.<br>You can include letters, numbers, dashes, underscores, parentheses, apostrophes, and spaces. |
| First name | The user's first name.<br>You can enter up to 25 characters. You can include letters, numbers, dashes, underscores, parentheses, apostrophes, and spaces. |
| Last name | The user's last name.<br>You can enter up to 25 characters. You can include letters, numbers, dashes, underscores, parentheses, apostrophes, and spaces. |
| Email | The user's email address. Here is an example:<br>Firstname.Lastname@openspan.com<br>You can enter up to 255 characters, including letters, numbers, periods, dashes, underscores, apostrophes, and plus signs (+).<br>**Note**: Management Console adheres to the RFC 2822 standard for Internet message formats. |
| User principal name | In Windows' Active Directory, a User Principal Name (UPN) is the name of a system user in this format:<br>UserName@InternetDomain<br>This can be the email address, but it does not have to be. |
| Active user | Check this box if the user is active. Remove the check mark to deactivate the user.<br>**Note**: Deactivated users are grayed. |
| Send account activation instructions | (Optional) Check this box if you want the system to send an email to the user which includes activation instructions. Remove the check mark to not send the email. |

| Field | Description |
|---|---|
| Roles | Select the roles assigned to this user. You can choose from these roles:<br>• Administrator<br>• Developer<br>• Report User<br>• Runtime User<br>• OSI Super Admin<br>You can also click add a role assignment to a user. See “Adding roles” on page 28 for more information.<br>If you want a user to have different roles for testing purposes, such as an Administrator also having a Runtime User role, set up two users.<br>**Note**: The OSI Super Admin role is only used with Workforce Intelligence. |

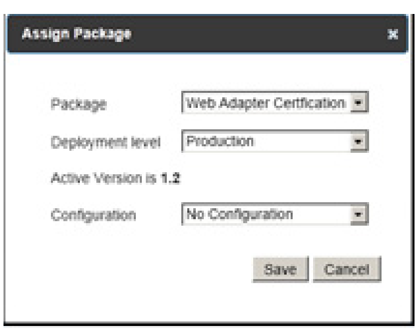
2. Click Save when finished.

## Assigning packages

Follow these steps to assign a package to a user:

1. Click the Package Assignments tab. The system shows you the packages assigned to this user, along with the deployment level, active version, and the configuration being used:


2. Click the Assign Package button to assign a package. The Assign Package window appears:




3. Use the following fields to define the assignment:

| Field | Description |
|---|---|
| Package | Select the package you want to assign to this user. |
| Deployment level | Choose the deployment level of the package you want to assign. |

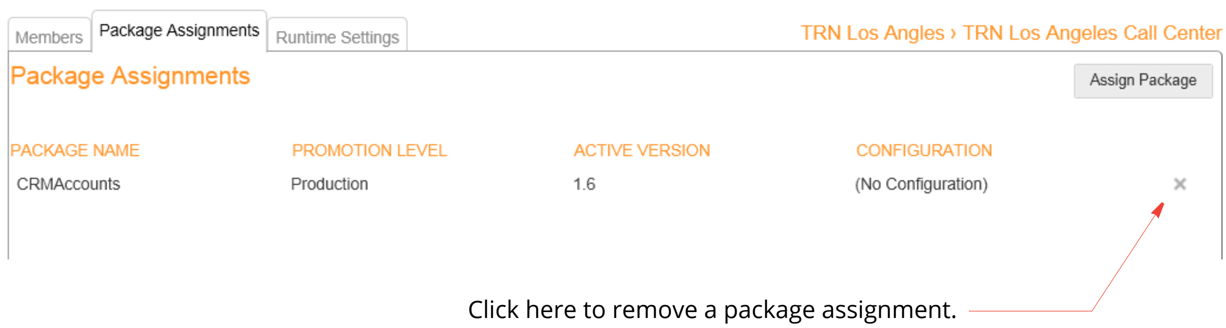
| Field | Description |
|---|---|
| Active version | This field shows you the current active version of the package. You cannot edit this field. |
| Configuration | Select the configuration you want to assign to this user. |

4. Click the Save button when finished.

## Deleting a package assignment

Follow these steps to remove a package assignment:

1. Click the Package Assignments tab. The system shows you the package assigned to this user, along with the deployment level. active version, and the configuration being used:




2. Click the Delete icon to remove a package assignment. The system lets you verify the deletion.
3. Click Yes to remove the assignment.

## Customizing a user's Runtime settings

You can click on the Runtime Settings tab to modify settings in the RuntimeConfig.xml file for this user. For more information, see "Modifying a user's configuration" on page 60.

## Using the Runtime audit trail

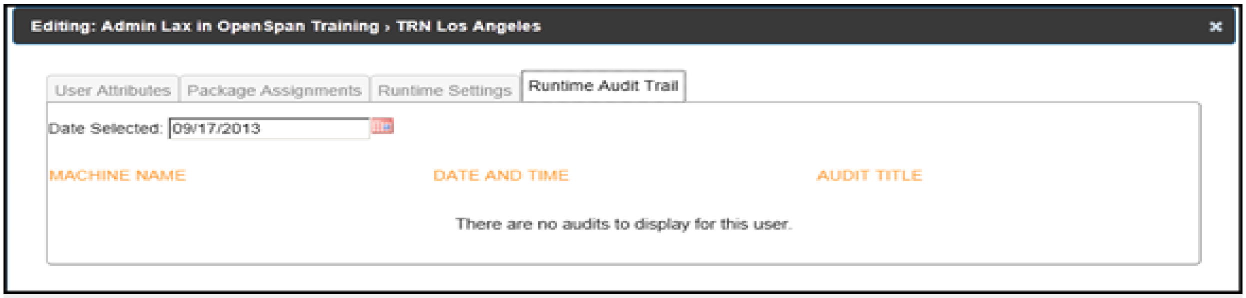
The Management Console provides an Updater-related audit trail for each Runtime user. This lets you see…

- Runtime version changes (switching branches)
- Repository fetches (when a fetch retrieves new branches to the local repository)
- Updater-related exceptions

You can use this information as a starting point for resolving any issues that might arise.

**Note** You must have Updater installed to see audit trail information about the Runtime user.

1. Click the Runtime Audit Trail tab. The system shows you the packages assigned to this user:




You can click on the column headings to sort the information.

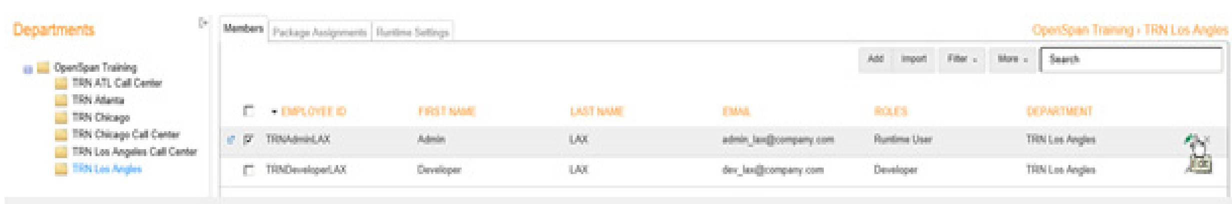
2. Click the Calender icon beside the Date Selected field to select a different date. The system refreshes the display based on the date you select.

# Resetting a single user’s password

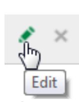
**Note** To reset your own password, see “Editing your profile” on page 16.

To reset another user’s password, follow these steps:

1. Click the Organization option. Then click the Members tab.
2. Click the check box beside the user for whom you want to reset the password.




3. Click the Edit icon for that user.




The Edit User window appears.

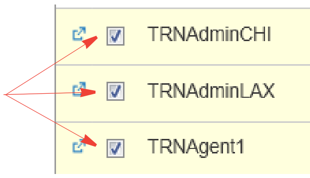
4. Scroll down to the bottom of the window and click the Reset Password link. The Password Reset message appears.
5. Click Ok.

# Resetting multiple user's passwords

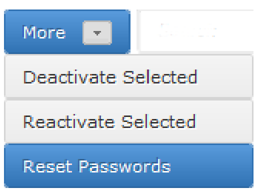
The system lets you send password reset emails to multiple users. For instance, you could use this capability when setting up a department. After importing user information and filling in any missing information, you could send all of the users in the department an email to reset their passwords.

Follow these steps to reset the passwords of multiple users:

1. Click the Organization option. Then click the Members tab.
2. Click the check box beside the users for whom you want to reset their passwords.




3. Click the More menu and select the Reset Passwords option.

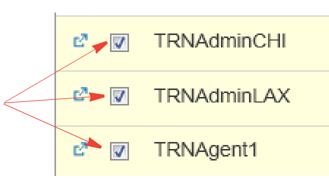



A message appears to tell you that Management Console sent Password Reset emails.

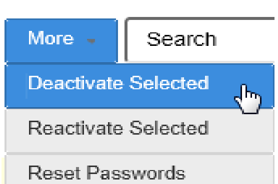
# Deactivating users

Follow these steps to deactivate one or more users:

1. Click the Organization option. Then click the Members tab.
2. Click the check box beside the users you want to deactivate.



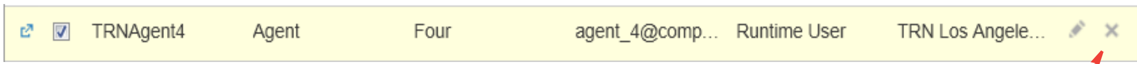

3. Click the More menu and select Deactivate Selected.




A message appears that lets you confirm you want to deactivate the selected users.

4. Click Ok.

You can also highlight a row and deactivate a user by clicking this icon:

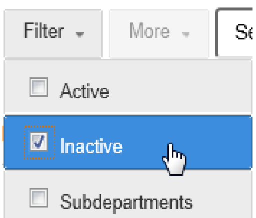



Click here to deactivate a user.

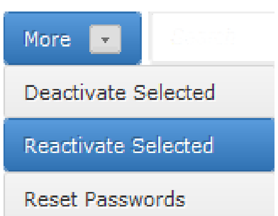
# Reactivating users

Follow these steps to reactivate one or more users previously deactivated.

1. Click the Organization option. Then click the Members tab.
2. Click the Filter menu and select the Inactive check box to see a list of inactive users.



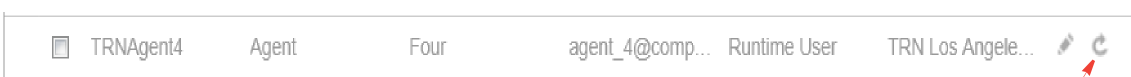

3. Click the check boxes beside the users you want to reactivate.
4. Click the More menu and select Reactivate Selected.




   A message appears that lets you confirm you want to reactivate the selected users.

5. Click Ok.

You can also highlight a row and reactivate a user by clicking this icon:




Click here to deactivate a user.

# Moving users

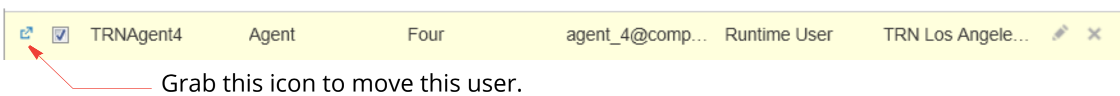
You can easily move users from one department to another by editing user information or by dragging and dropping users to another department. Keep in mind that when you move users, they inherit or disinherit the packages assigned to the departments.

This table shows what happens to package assignments when you move a user:

| If you move user A | The user retains any assignments specifically assigned and |
|---|---|
| Into a department B | Inherits any assignments assigned to department B, while retaining all of the assignments specifically made to user A. |
| From a department B | Disinherits any assignments assigned to department B, while retaining all of the assignments specifically made to user A. |

Follow these steps to move users to another department:

1. Highlight the user or users you want to move.
2. Grab the Move icon and drag the users to the new department.



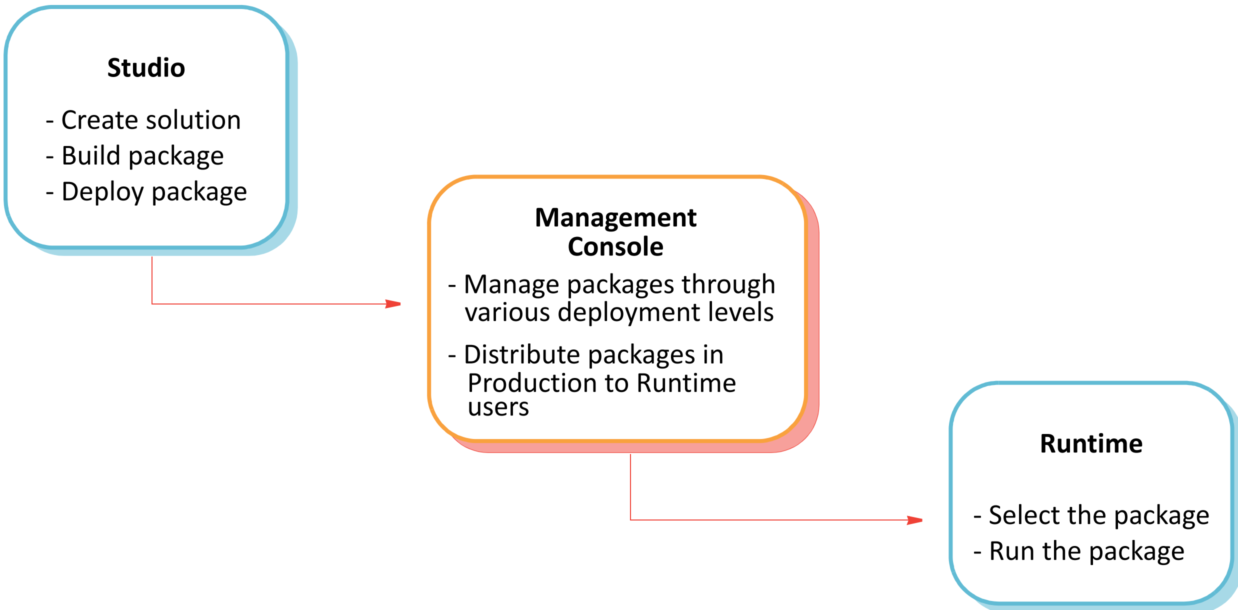

Grab this icon to move this user.

| Note | You can select and move multiple users at a time. |
|---|---|

# Managing packages

Use the Package Assignments tab to manage the packages you develop, test, and implement. These packages — or solutions — proceed through various stages as they are developed, tested, and implemented. Management Console helps you manage the testing and implementation stages.

Solutions are developed in Studio. Once finished, the Studio developer builds the package and deploys it to Management Console. There it is placed into the initial deployment level, called *Development*.




**Note** For more information on creating and deploying solutions in Studio, see the Help.

From the Development level, you manage the package's progress as it proceeds from development through testing to production. The initial (Development) and final (Production) deployment levels are created for you, but you can set up as many intermediary deployment levels as you need.

Once you promote a package to Production, Management Console compares the local, Runtime version to the version in Production. If there are any differences, Management Console makes available the version it has in Production.

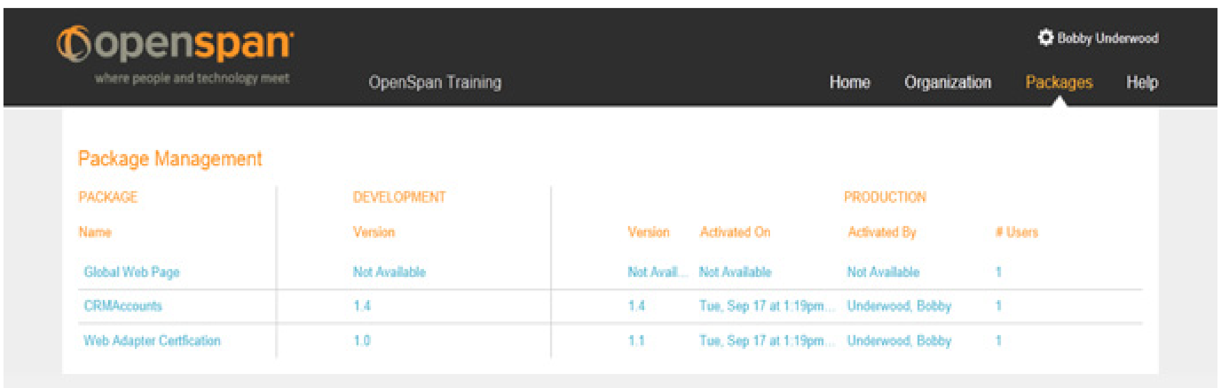
**Note** Management Console uses the MD5 message-digest algorithm to determine if it should fetch the package from Production.

Package assignments and configuration options let you specify who gets the package and whether the user can select from a list of available packages or if the packages are automatically installed the next time Runtime starts.

A key in managing package assignments is understanding *inheritance*, keep these points in mind:

| **If you assign a package to a** | **Then** |
|---|---|
| Department | All members of that department inherit the assignment for as long as they remain in that department. |
| User | The user retains that assignment, regardless of the department the user is placed in. |
| **If you move a user** | **That user** |
| Into a department | Inherits any assignments assigned to the department and retains any assignments specifically assigned to the user. |
| From a department | Disinherits any assignments assigned to the department and retains any assignments specifically assigned to the user. |

Use the Packages tab to track the status of a package and how many users have it, create deployment levels, promote packages. activate or deactivate packages, and modify package configuration options. When you click this tab, Management Console shows you the Package Management page:




This page shows you an overview of your package assignments, including...

| **Column** | **Shows you...** |
|---|---|
| Package Name | The name of your packages. |
| Development | |
| Version | The version number that was assigned to the package in development. |
| Production | |
| Active version | The version number that was assigned to the package when it went to Production. |
| Activated on | The date on which the package was activated. |
| Activated by | Who activated the package. |
| # of Users | How many users are using this package. |

From the Packages option, you can perform these management tasks:

- "Setting up deployment levels" on page 42
  - "Adding deployment levels" on page 43

  - “Modifying deployment level names” on page 44
  - “Deleting deployment levels” on page 45
- “Promoting a package” on page 46
- “Making a package the active version” on page 49
- “Making a package inactive” on page 49
- “Viewing a package’s configuration” on page 50

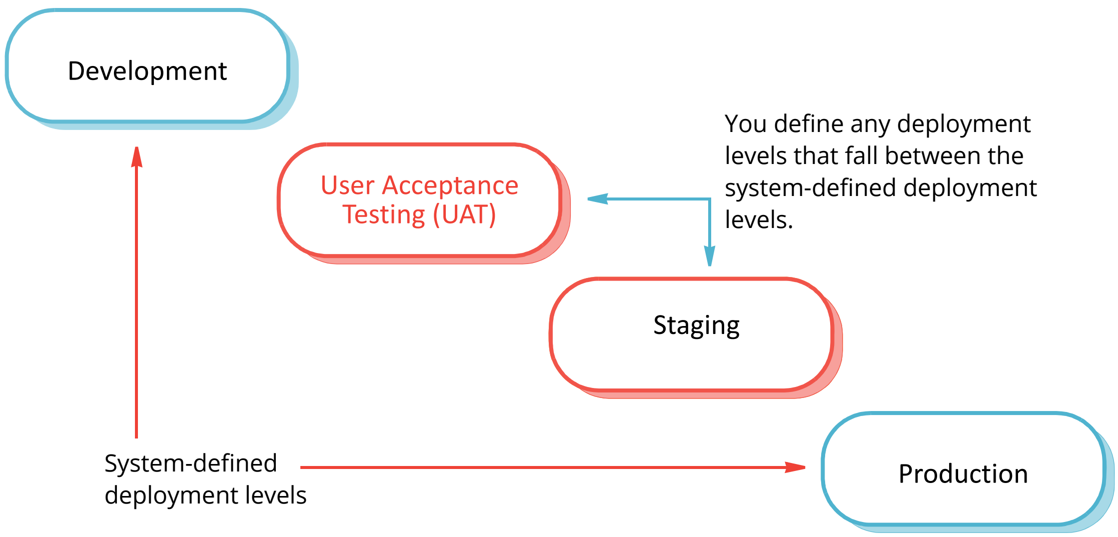

From the Package Assignments tab on the Organization page, you can perform these tasks:


- “Assigning packages” on page 50
  - “Assigning packages to a department” on page 51
  - “Assigning packages to a user” on page 52

# Setting up deployment levels

*Deployment levels* denote the various stages a Studio solution goes through as it is developed, tested, and implemented. The system includes two built-in deployment levels, *Development* and *Production*, which cannot be changed.

You can define as many intermediary deployment levels as you need. These deployment levels will fall between the system-defined deployment levels. Here is a typical scenario with additional deployment levels for user acceptance testing (UAT) and staging:

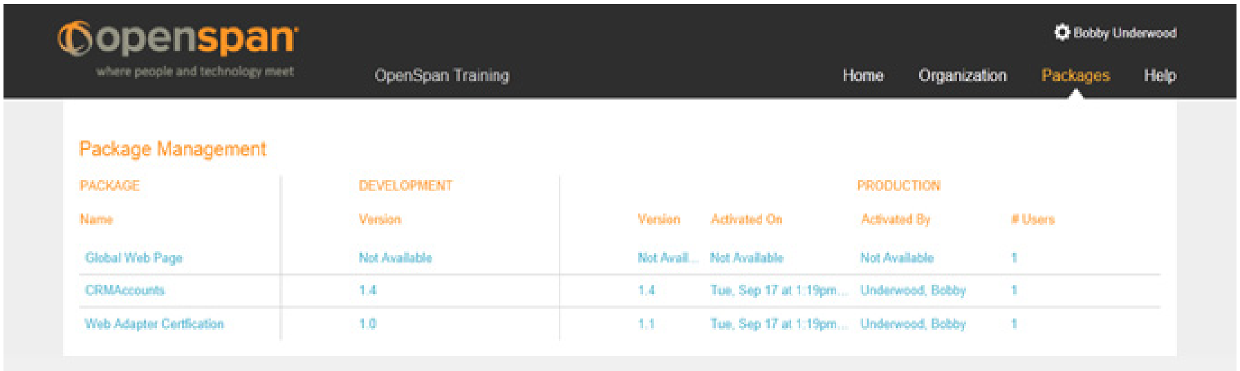



You can add as many deployment levels as you need to show how a Studio solution flows through your organization and you can assign any name you want to the deployment levels you create.

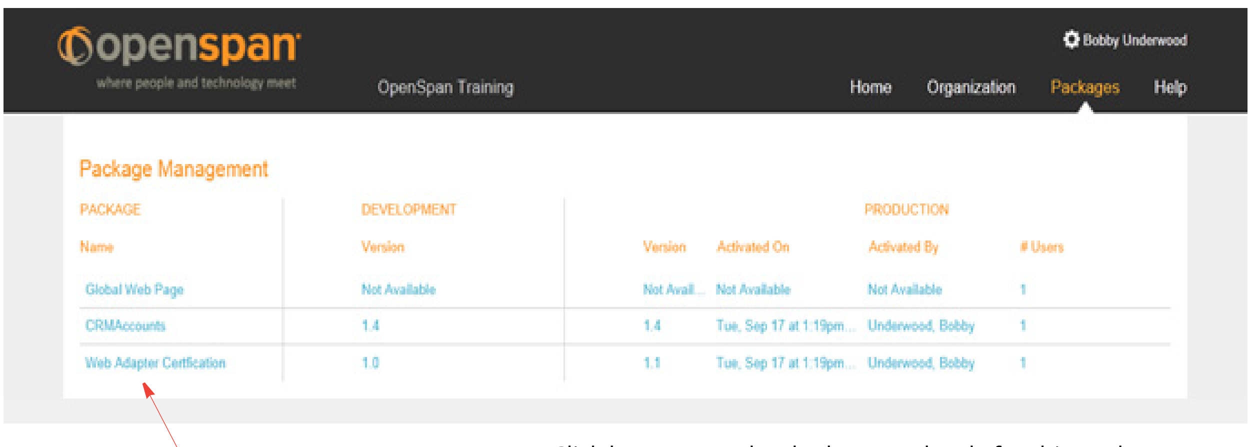
# Adding deployment levels

Follow these steps to add deployment levels.

1. Choose Packages. The Package Management window appears.

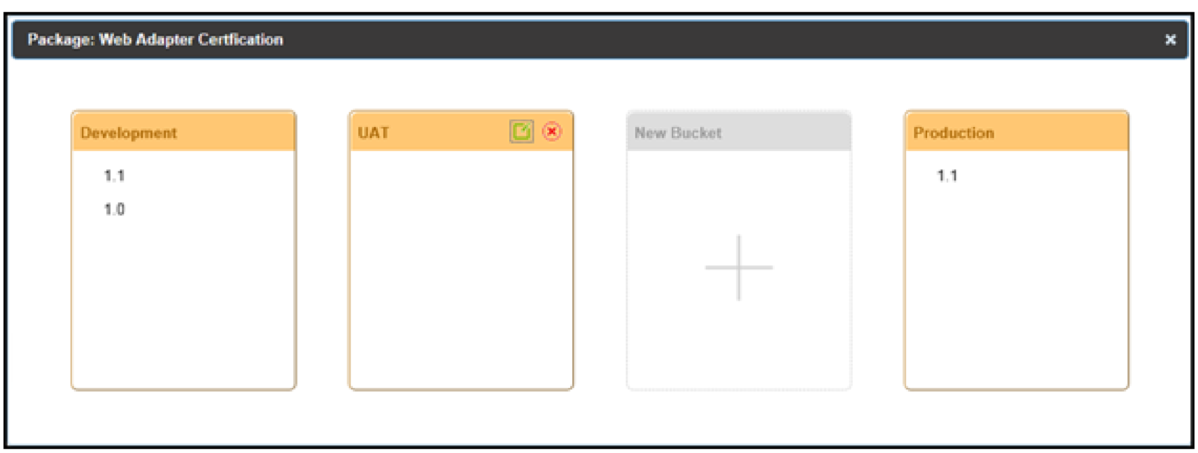



2. Highlight the package row and click the underlined package name.

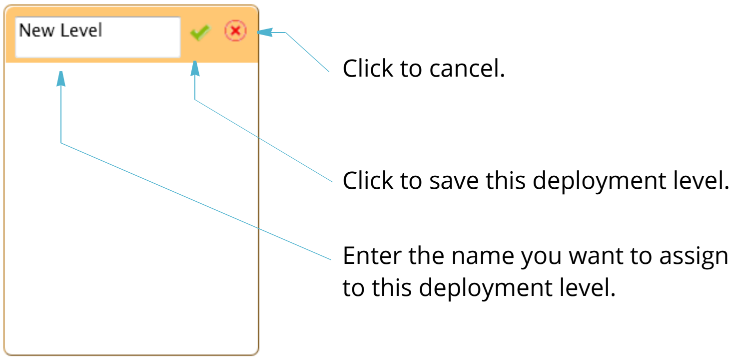



Click here to see the deployment levels for this package.

The deployment level window appears:



3. Click New Bucket to add a deployment level. The system lets you assign a name to the new deployment level:

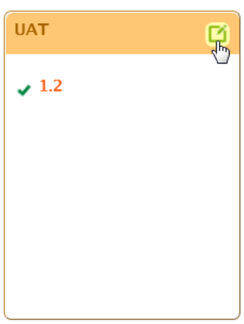



4. Enter the name you want to assign to the deployment level. You can enter up to 20 characters, including spaces. Then click the Save icon (✓). The system adds the deployment level to the package.

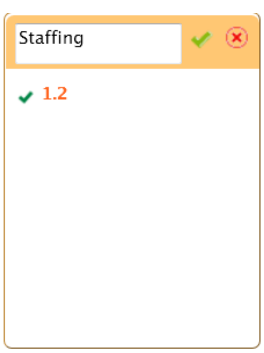
## Modifying deployment level names

You can modify the names of the deployment levels you create.

1. Click the Edit icon.

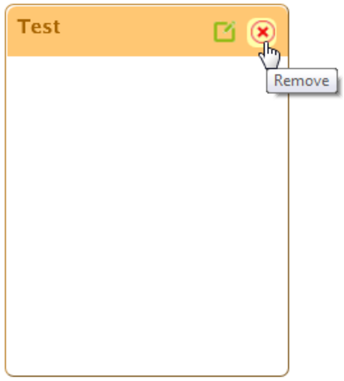



2. Enter the new name in the Name field and click the Save icon (✓).



# Deleting deployment levels

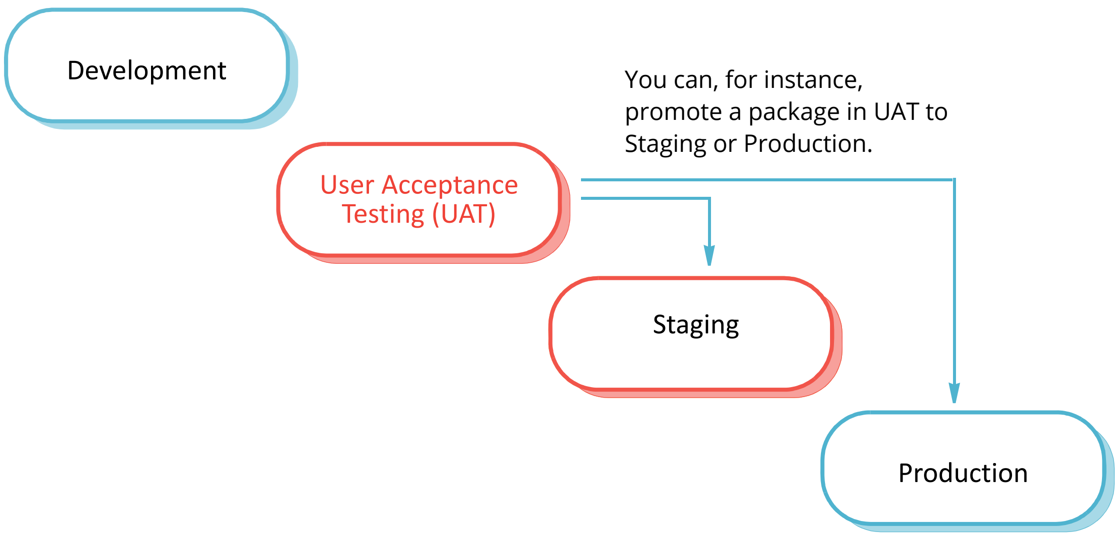
To delete a deployment level, click the Remove icon.




**Note** You can only delete a deployment level if it has not yet contained a package.

# Promoting a package

When you promote a package, you move it from one deployment level to another. For instance, if a package has completed user acceptance testing (UAT), you would then want to promote it to Staging or perhaps to the final deployment level, Production.

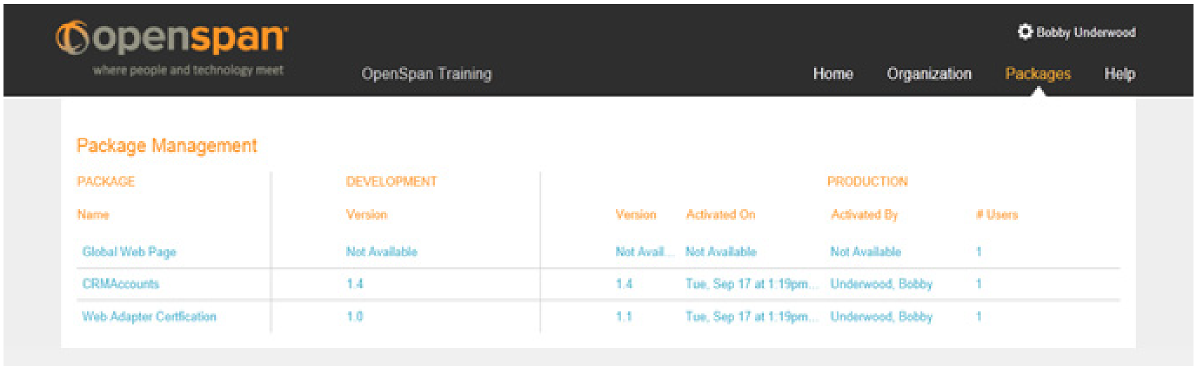



When promoting packages, keep in mind…

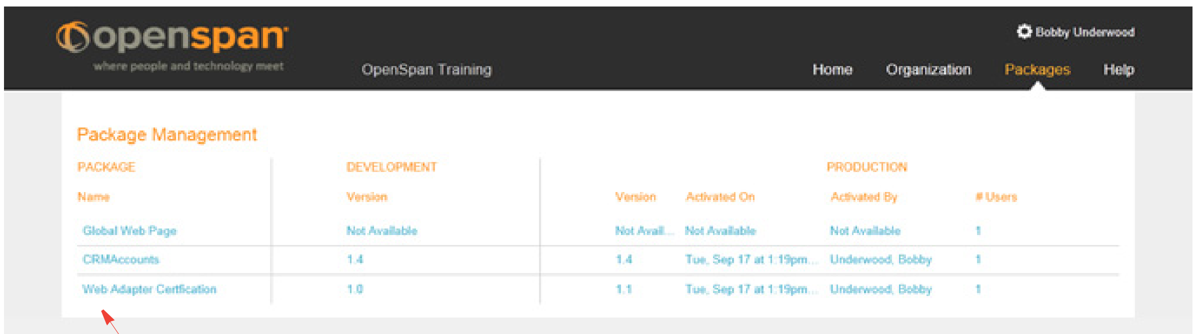
- When packages first come in from Studio, they are placed in the Development deployment level and marked inactive.
- You can promote a package one or more deployment levels at a time.
- You cannot skip a deployment level during a promotion. The system will automatically include the package in all levels between the current deployment level and the target deployment level.
- Promoting does not make a package active, that is a separate task. See “Making a package the active version” on page 49 for more information.
- You cannot demote a package, but you can make a package inactive. See “Making a package inactive” on page 49 for more information.
- For reporting purposes, you cannot delete a package.

To promote a package to another deployment level, follow these steps:

1. Choose Packages. The Package Management window appears.

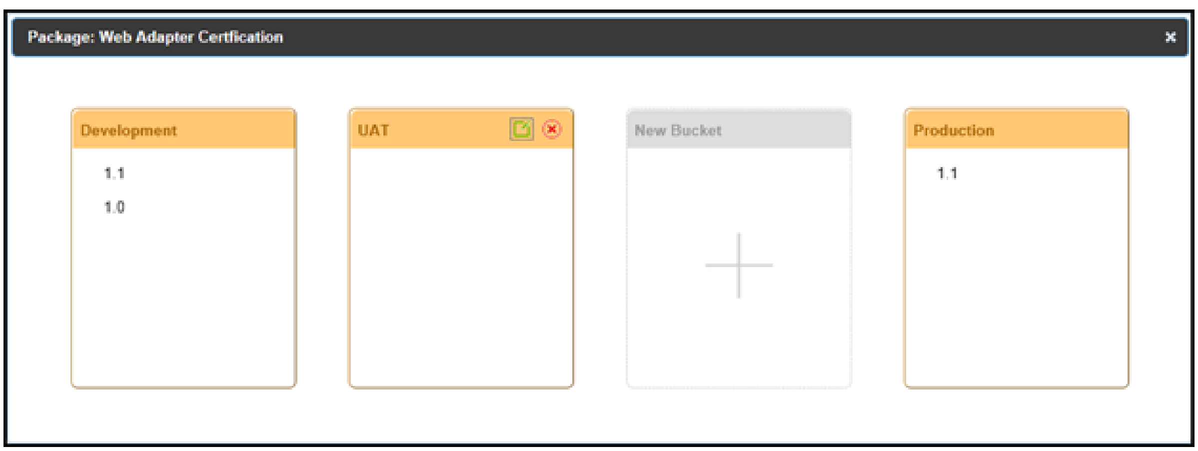



2. Highlight the package row and click the underlined package name.

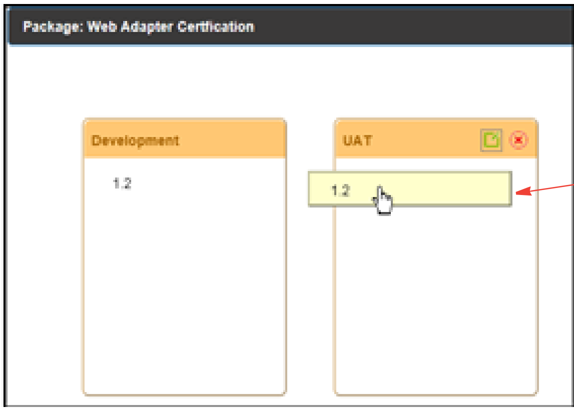



Click here to see the deployment levels for this package.

The deployment level window appears:

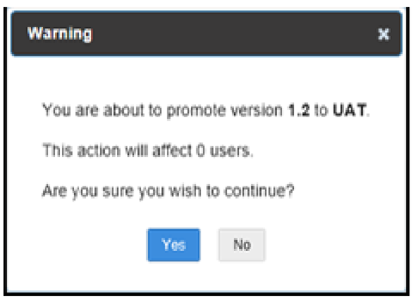



3. Highlight the version you want to promote, then drag it to the appropriate development level.

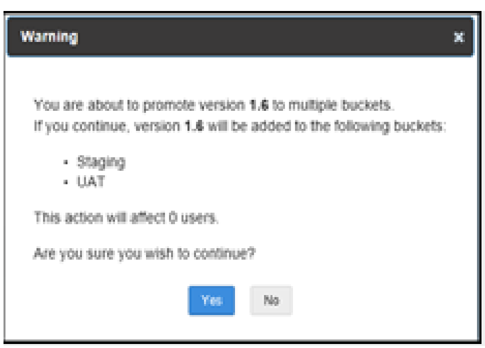



Here version 1.2 is being promoted to UAT (User Acceptance Testing).

If you are promoting the package one level, you will see a confirmation message similar to this one:




If you are promoting the package multiple levels, you will see a confirmation message similar to this one:



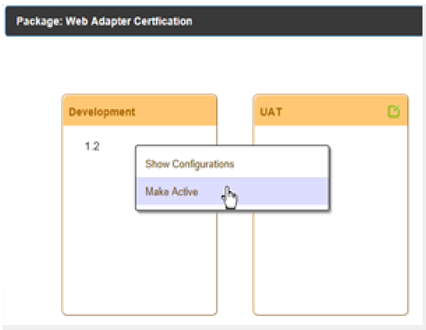

4. Click Continue to promote the package or Cancel to exit without promoting anything.

# Making a package the active version

| Note | When packages first come in from Studio, they are placed in the Development deployment level and marked inactive. |
|---|---|

To make a package the active version, follow these steps:

1. Highlight the deployment level you want to make the active version and right click.

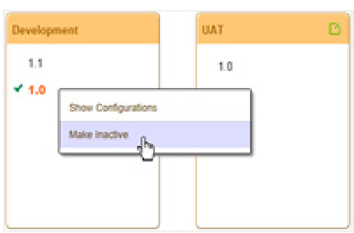



2. Choose the Make Active option.

# Making a package inactive

To make a package inactive, follow these steps:

1. Highlight the deployment level you want to make inactive and right click.

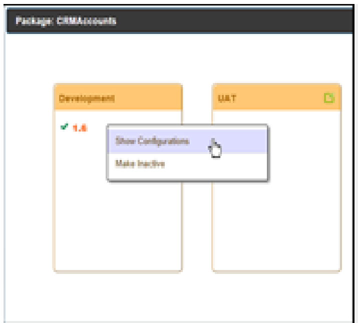



2. Choose the Make Inactive option.

# Viewing a package’s configuration

To view the package’s configuration information, follow these steps:

1. Highlight the deployment level you want to view and right click.




2. Choose the Show Configurations option. The system shows you the configuration file for the package you selected.


3. Review the file as needed. For information on making changes to the settings in the file, see “Customizing the RuntimeConfig file” on page 59.

# Assigning packages

Though not accessed via the Packages tab, assigning packages is discussed in this topic.

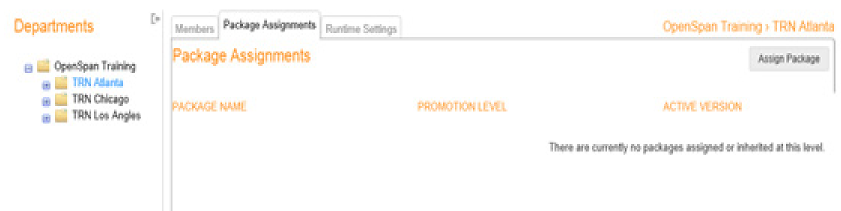
There are two ways to assign a package, to a department or to a user. This table shows what happens when you assign a package to a department or user:

| If you assign a package to a | Then |
|---|---|
| Department | All members of that department inherit the assignment for as long as they remain in that department.<br>See “Assigning packages to a department” on page 51 for more information. |
| User | That assignment stays with the user, regardless of the department the user is placed in.<br>See “Assigning packages” on page 33 for more information. |

# Assigning packages to a department

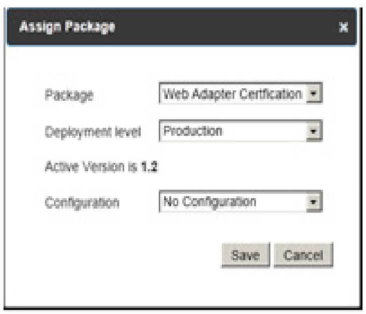
Follow these steps to assign a package to a department:

1. Click Organization.
2. In the department hierarchy, highlight the department to which you want to make the package assignment. Then click the Package Assignments tab.




The system shows you a list of assigned packages.

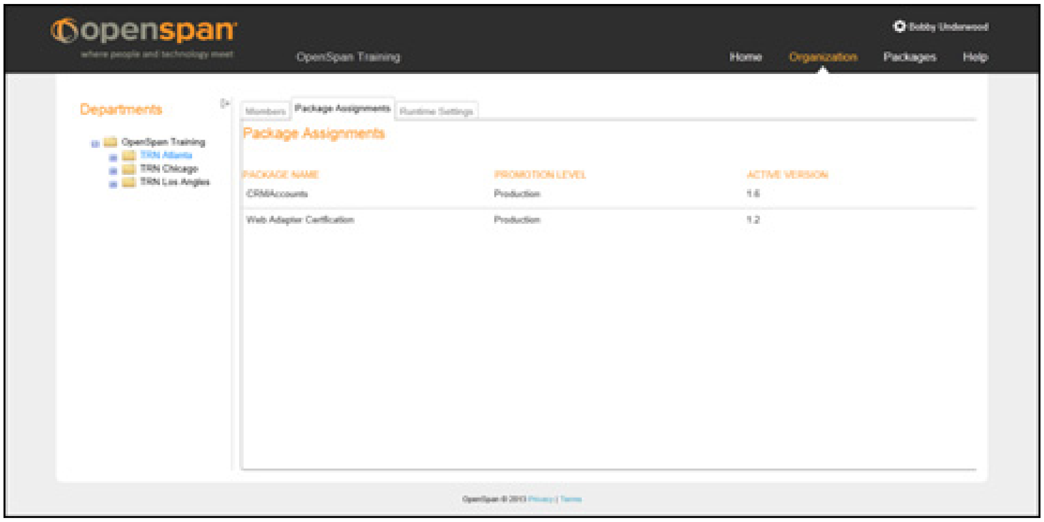
3. Click the Assign Package button. The Assign Package window appears:




4. Use the following fields to define the assignment:

| Field | Description |
|---|---|
| Package | Select the package you want to assign to this user. |
| Deployment level | Choose the deployment level of the package you want to assign. |
| Active version | This field shows you the current active version of the package. You cannot edit this field. |
| Configuration | Select the configuration you want to assign to this user. |

5. Click the Save button when finished. The package is applied to the selected department.

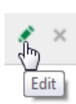



If you need to make an assignment to some but not all members of a department, you can either make individual assignments to each user or create a temporary department and move those users into that temporary department. Once the assignment is over, move the users back into their regular department.

## Assigning packages to a user

Follow these steps to assign a package to a user:

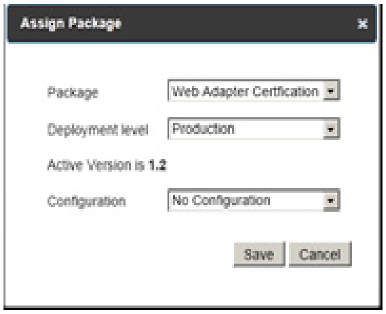
1. Click Organization. Then click the Members tab.
2. In the department hierarchy, highlight the department to which the user belongs.
3. Highlight the user to whom you want to assign a package.
4. Click the Edit icon for that user.




5. Click the Package Assignments tab. The system shows you the packages already assigned to this user, along with the deployment level, active version, and the configuration being used:


Click here to assign a package.

6. Click the Assign Package button to assign a package. The Assign Package window appears:




7. Use the following fields to define the assignment:

| Field | Description |
|---|---|
| Package | Select the package you want to assign to this user. |
| Deployment level | Choose the deployment level of the package you want to assign. |
| Active version | This field shows you the current active version of the package. You cannot edit this field. |
| Configuration | Select the configuration you want to assign to this user. |

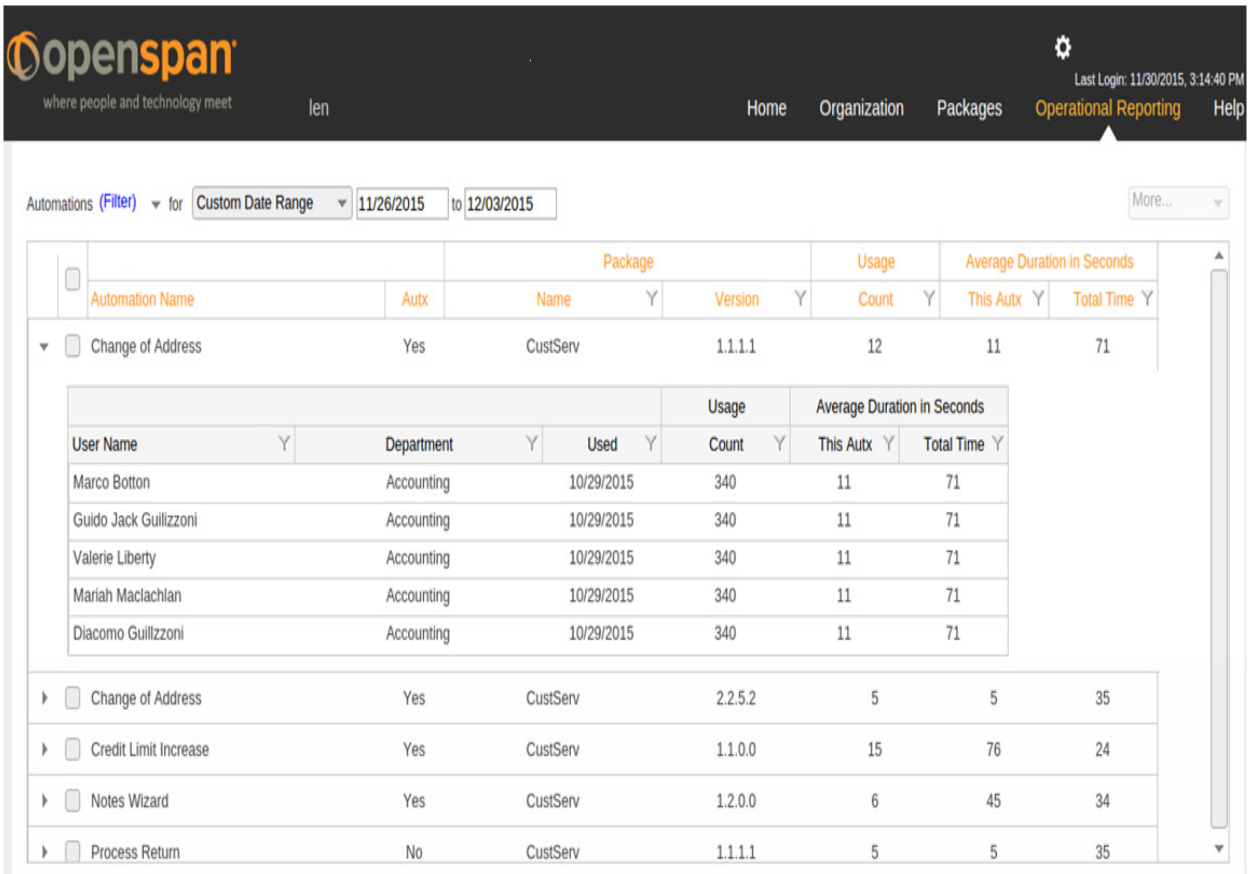
8. Click the Save button when finished.

# Using the reports

The Automation and Activity Usage Report, available from the Reporting tab, provides information about the automations and activities used by Runtime/Agile Desktop users. This information is gathered on the Runtime/Agile Desktop machine and sent to Management Console at specified intervals. You specify the interval in the RuntimeConfig.xml file.

| Note | The Reporting tab is only available to users who have been assigned the Administrator or Report User role. It is not available to users assigned the Runtime role. For more information on roles, see “Adding roles” on page 28. |
|---|---|

You can use this report to drill into the automations and activities and review information about the Runtime/Agile Desktop users who accessed them. Here is an example of the report:



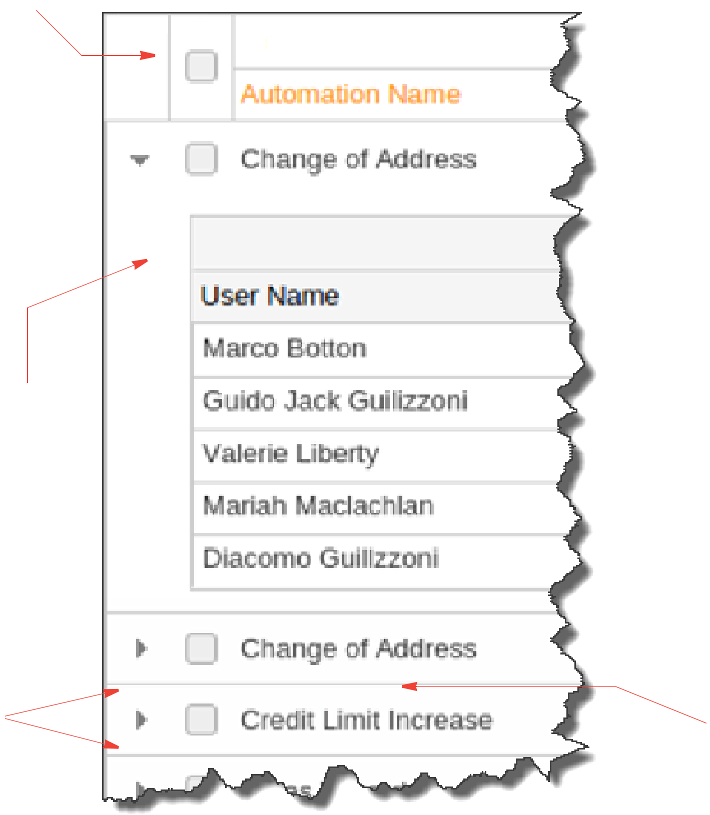

The report includes this information in these columns:

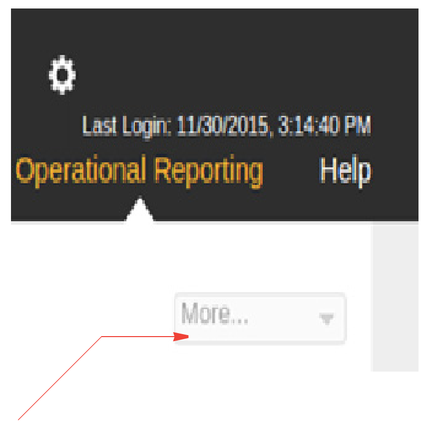
| Column | Description |
|---|---|
| Automation or Activity Name | This can also be aliased by an administrator. Aliasing can be done on the configuration screen or on the report itself (note the pencil icon to the right of the name). Aliases apply to all automations/activities across all package versions for which they are found. |
| Autx | Yes indicates it is an automation. No indicates it is an activity. |

| Column | Description |
|---|---|
| Package Name | The name of the package from which this automation/activity was used. |
| Package Version | The version of the package from which this automation/activity was used. |
| Usage | Indicates how many times the automation/activity was used within the date filter you selected. |
| Average Duration in Seconds | Tells you the amount of time spent on the automation or activity.<br>**Note**: Solution developers can use this information because it provides context into the processing time of the specific automation (total time includes the processing time of sub-automations). |

You can filter the results by a custom date range or by a specific week, month, quarter, or year. Here is an example:


You can also use these check boxes to mark and select automations; either individually or the entire list.




Click here to download details for the automations you selected in a CSV format or to filter the selected automations from the list.

Click an automation name to drill into the users who used that automation/ activity.

Use the Filter link to restore automations which have been filtered from the list.

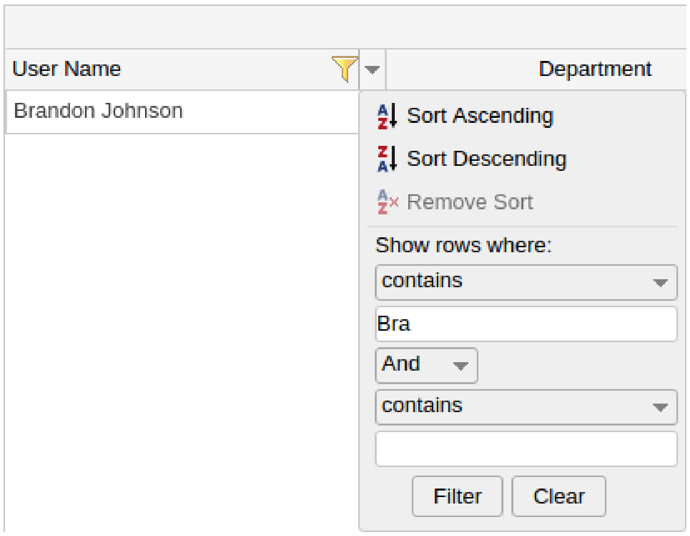

Automations (Filter)
for
Custom D

# Viewing the tables

This report includes these tables:

- Automation/Activity table
- User table

You can click any of the column headers to change the sort order of the data. Also, clicking on the filter symbol for a column lets you further filter out data from the list. Here is an example of the filter window which shows the list is limited by the applied filtered.




## Using the Automation/Activity table

This table provides the following information:


| Column | Description |
|---|---|
| Automation Name | Tells you the name, or aliased name, of the automation or activity. |
| Autx | True indicates the detail is for an automation. False indicates the detail is for an activity. |
| Package Name | Indicates the package name from which the automation/activity is found. |
| Package Version | Indicates the version of the package from which the automation/activity is found. Package versions are not combined on this report. |
| Usage Count | Tells you the total times the automation/activity was accessed during the time range you specified. |
| Average Duration in Seconds - This Autx | Tells you how much time was spent during the processing of this automation/activity. |
| Average Duration in Seconds - Total Time | Specifies the average amount of time spent processing this automation and all of its sub-automations. |

# Using the user table

This table provides the following information:

| | | | Usage | Average Duration in Seconds | |
|---|---|---|---|---|---|
| User Name | Department | Used | Count | This Autx | Total Time |

| Column | Description |
|---|---|
| User Name | Tells you the first and last name of the user. |
| Department | Specifies the department in which the user is a member. |
| Usage Count | Indicates the number of times the user accessed the automation/activity during the time frame you specified. |
| Average Duration in Seconds - This Autx | Tells you the average amount of time this user spent processing this automation/ activity. |
| Average Duration in Seconds - Total Time | Tells you the average amount of time this user spent processing this automation and its sub-automations. |

# Customizing the RuntimeConfig file

The Pega provides two ways to easily view and edit the RuntimeConfig.xml file, which contains the configuration settings for Runtime. As with packages, you can view and edit this file for a department or for an individual.

Also, as with packages, all users in a department, including users in subdepartments, inherit the settings you make for the department. This is true as long as the users remain in that department.

Settings you customize for an individual user remain in effect regardless of the department the user is currently in.

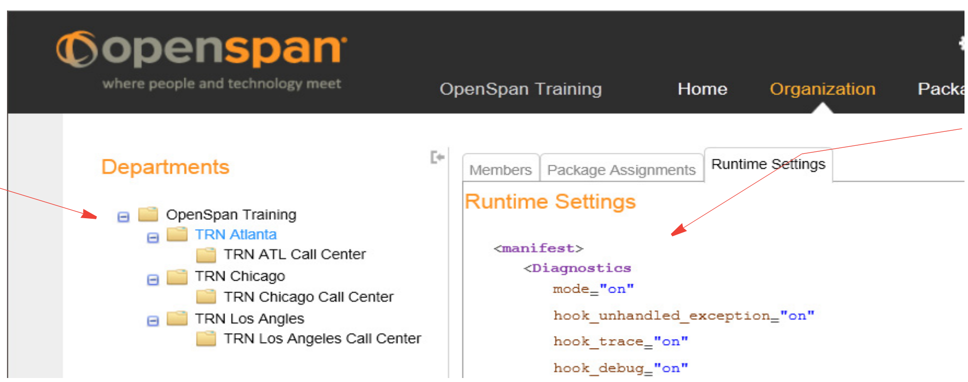
The RuntimeConfig.xml file includes options which let you...

- Turn on diagnostics
- Define what diagnostic information is recorded
- Define logging categories
- Define if emails are sent when Runtime encounters exceptions
- Define which events are recorded
- Specify general application settings, like what project should be loaded automatically when Runtime starts

| Note | You can find detailed information on all the options in the RuntimeConfig.xml file in the Help. See this topic for more information:<br>http://help.openspan.com/71/Platform_Configuration/RuntimeConfigXML.htm |
|---|---|

The original RuntimeConfig.xml file will appear at the uppermost or root department level of the department hierarchy. This file — unless you change it — contains the default values set by Pega.

This is the root level.



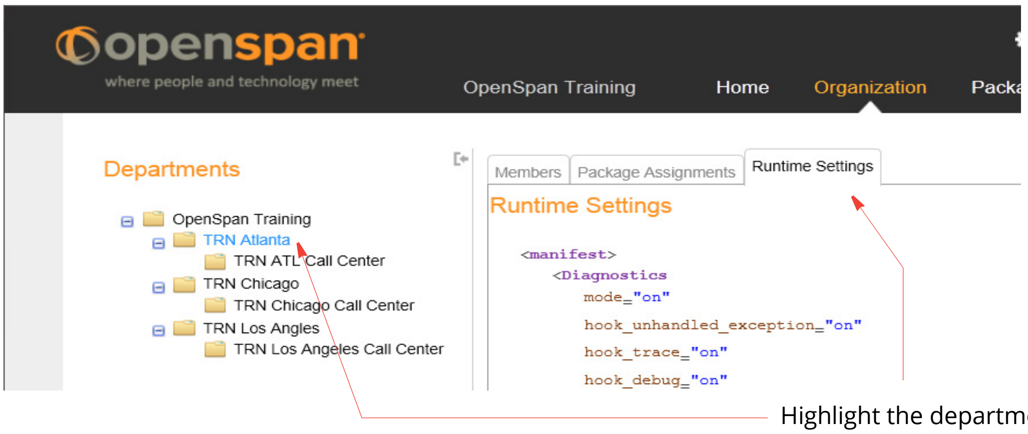

Here are the settings for the root level.

## Modifying a department's configuration

These steps show you how to modify the RuntimeConfig.xml file for a department. Keep in mind the changes you make affect all users in the department and all users in any subdepartment of this department.

Follow these steps:

1. Click the Organization option.
2. Highlight the appropriate department.
3. Click the Runtime Settings tab.




Highlight the department and click the Runtime Settings tab.

The system shows you the RuntimeConfig.xml file assigned to this department:

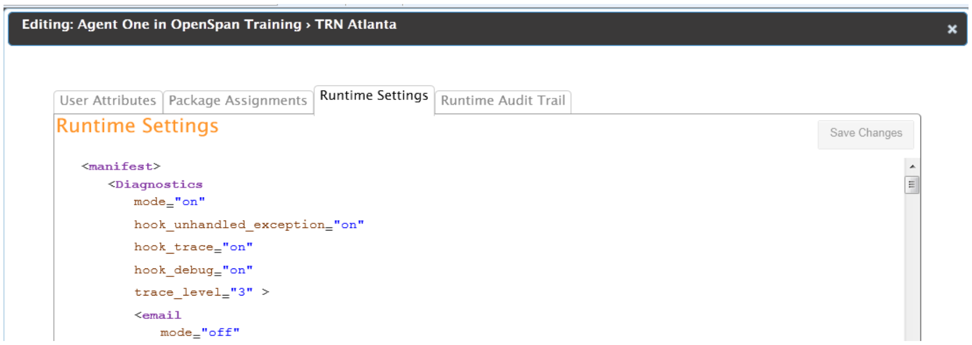
4. See "Modifying the RuntimeConfig.xml file" on page 61 for more information.

## Modifying a user's configuration

These steps show you how to modify the RuntimeConfig.xml file for a single user. Keep in mind the changes you make affect only this user and stay with this user, regardless of the department assignment.

Follow these steps:

1. Click the Organization option.
2. Highlight the appropriate department.
3. Select the appropriate user, then click the Edit icon.
4. Click the Runtime Settings tab.




The system shows you the contents of the RuntimeConfig.xml file assigned to this user.

5. See “Modifying the RuntimeConfig.xml file” on page 61 for more information.

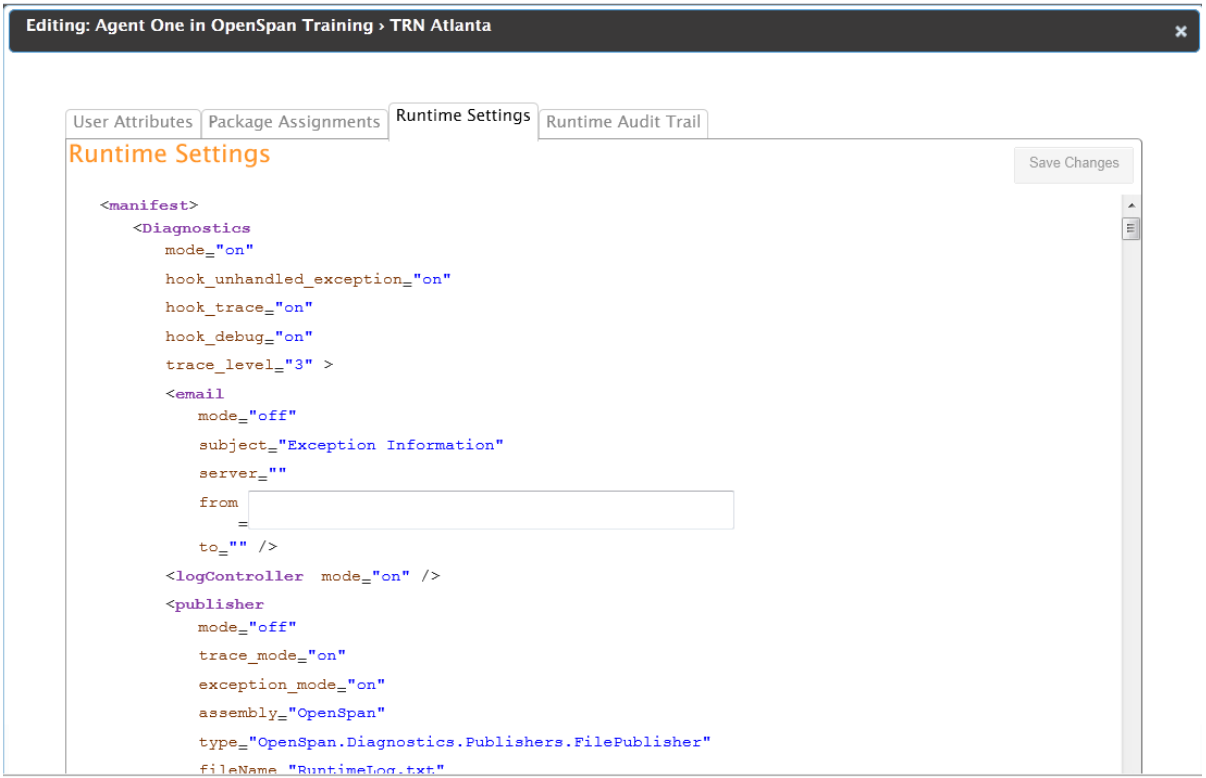
## Modifying the RuntimeConfig.xml file

These steps show you how to modify the RuntimeConfig.xml file for a department or user. Before you make changes, keep these points in mind...

- Tool tips tell you where option settings originated.
- The system *does not* validate your entries.
- Your changes are shown against a yellow background until you click the Save button.
- The Save button appears in orange if you have unsaved changes.
- If you exit without clicking the Save button, your changes will be discarded.
- You can set up temporary departments and move users in and out as needed.

Follow these steps:

1. After you click the Runtime Settings tab, the system shows you the contents of the RuntimeConfig.xml file assigned to this department or user:




Click on the section names to expand or collapse the display of options in a section. For instance, if you click <Diagnostics in the example, your display changes to:

```
<manifest>
    <Diagnostics … > … </Diagnostics>
    <HighLevelEvents
        disabled="true"
        captureEvents="true"
```

2. Scroll down to the setting you want to change and click on the value currently assigned. The system lets you edit that value:

As you move your cursor from one option to another, the system shows you where the current value originated.

3. Enter your changes.
4. Click the Save button when finished.

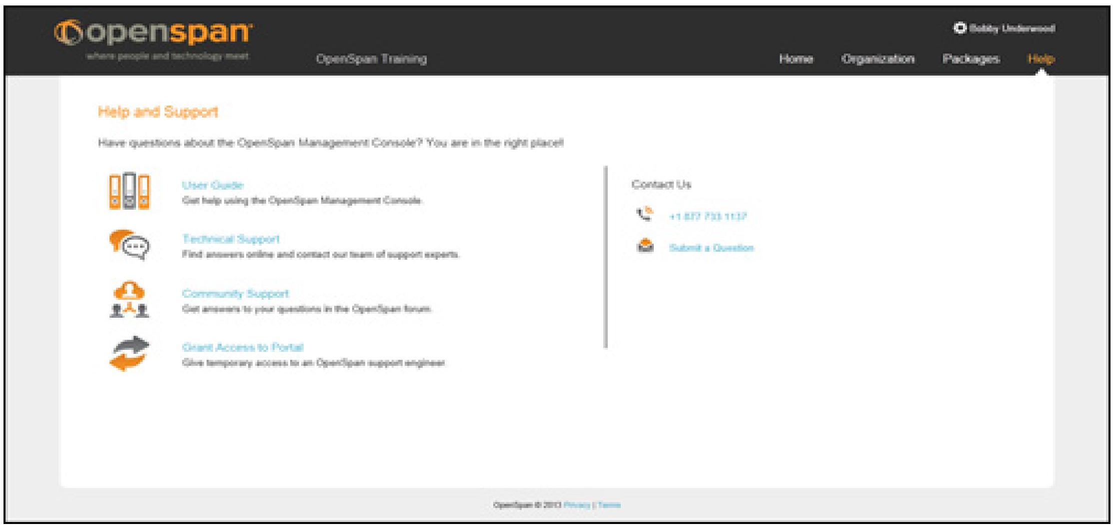
# Getting Help

The Help option provides contact information and quick access to the following:

- Management Console documentation — Takes you to this documentation.
- Technical Support — Takes you to the Support Center, where you can research issues in our Knowledge Base, download builds, and request help from Support Engineers.
- Community Support — Takes you to the Community forum, where you can find answers to questions in a Support-monitored forum.

In addition, you can use this option to grant temporary access to an Support Engineer so the engineer can help you resolve an issue. See “Granting access to the portal” on page 63 for more information.

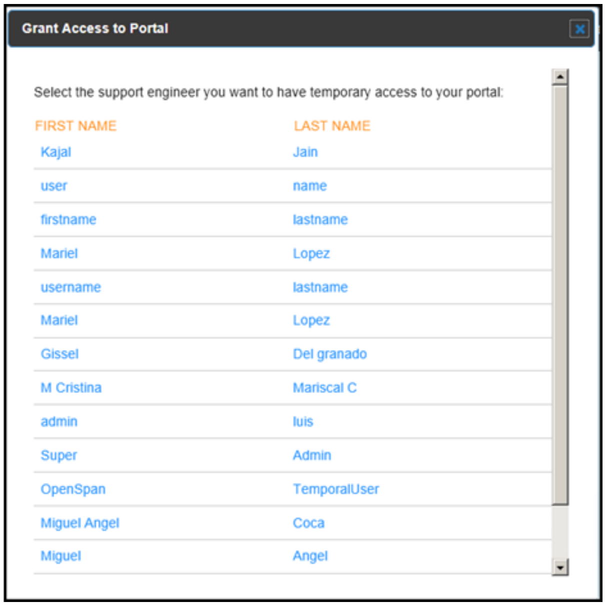
When you click the Help option in the banner, this page appears:



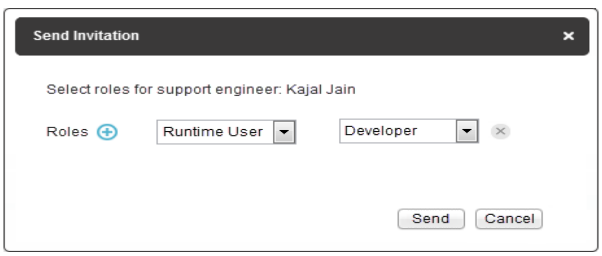

## Granting access to the portal

If an issue arises, a Support Engineer may request access to your Management Console portal. To grant access, first get the Support Engineer’s name, then follow these steps:

1. Click the Help option.
2. Click the Grant Access to the Portal option. The Grant Access to Portal window appears.




3. Select the Support Engineer to whom you want to grant access. The Send Invitation window appears:




4. Select the role you want to temporarily assign to the Support Engineer, such as Administrator.
5. Click the Send button.

   The system sends an invitation to the Support Engineer you chose so that engineer can access your portal and also displays a confirmation message. Click Ok.

| Note | Once the Support Engineer activates the temporary account, he or she will have access to your portal for one week, then the temporary account is automatically be deleted. The activation email expires after six hours of being issued. |
|---|---|

# Connecting to Studio and Runtime

The CommonConfig.xml configuration file is copied to user's desktops when Studio and Runtime are first installed or updated to version 6.1 or higher. This file contains information necessary to connect to and work with Management Console and is usually found in these locations:

| Operating system | Path to the CommonConfig.xml file |
|---|---|
| Windows 7 | C:\ProgramData\OpenSpan\CommonConfig.xml |
| Windows XP | C:\Documents and Settings\All Users\Application Data\OpenSpan\CommonConfig.xml |

Here is an example:

```
<ServerConfiguration tenant="CompanyName">
  <Servers>
    <Server name="Config" baseURL="http://ows.openspan.com/" enabled="true" />
    <Server name="ADFS" baseURL="https://ows.openspan.com" enabled="true" />
  </Servers>
</ServerConfiguration>
 <ConfigurationLocation>ApplicationData</ConfigurationLocation>
```

| Property | Description |
|---|---|
| tenant | The tenant name assigned to the company. This is typically the company name, omitting any non-alphanumeric characters. |
| Servers | Contains a list of the servers used by Pega applications. |
| Servers/Server/name | The name (type) of the server. For example, Config servers are used to authenticate and deliver configuration settings.<br>An Active Directory Federation Services (ADFS) server provides security tokens which are consumed by the configuration server. You can set up and enable an ADFS server to implement single sign-on using the identity of the currently logged in Windows user.<br>**Note**: An ADFS server entry is optional. If omitted, users are prompted to enter their email address and password. |
| Servers/Server/baseURL | You can enter an IP address or a URL. Do not include the tenant name in the URL. |
| Servers/Server/enabled | The address of the server. Set to True to use this server entry, or False to not use it. |
| ConfigurationLocation | Specifies the location of the configuration information.<br>You can enter absolute paths, environment variables, and SpecialFolders enumerated values, such as CommonApplicationData, LocalApplicationData, Documents, Personal, or Temporary. The default is ApplicationData.<br>For examples, see "RuntimeConfig.xml" on page 8. |

**Note** If more than one server with the same name is present, the last one in the list is used, even if it is not enabled.

## Running Runtime offline

When you install the stand-alone version of Studio, Runtime is also installed. When you run a project from the Microsoft Visual Studio IDE, Runtime starts, but does not connect to Management Console, instead it runs offline. You can also start Runtime without starting Studio, if you want.

Use the AllowRunOffline property in the RuntimeConfig.xml file to change how Runtime responds if it cannot connect to Management Console:

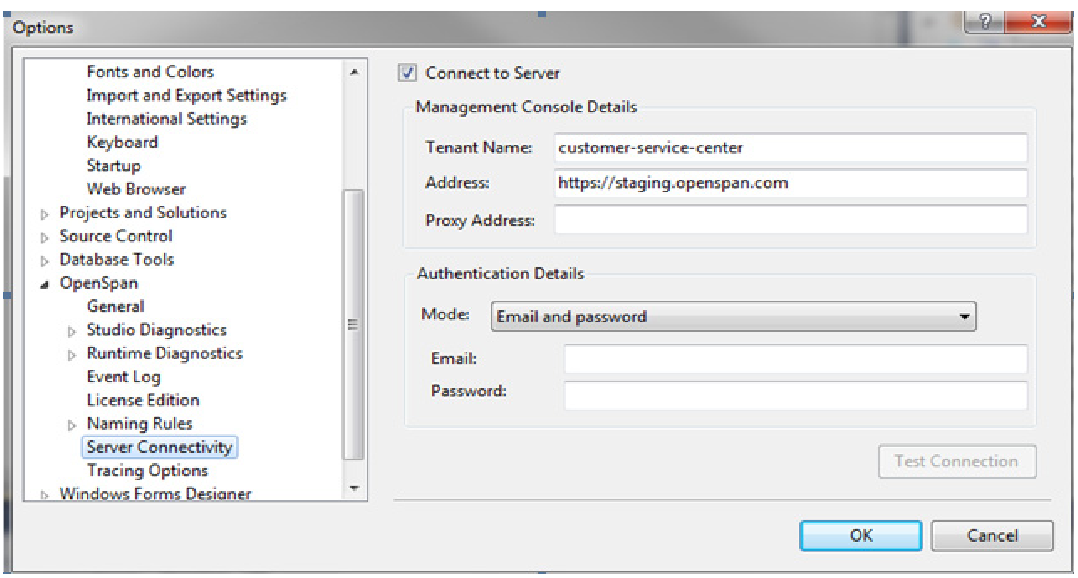
| Property | Description |
|---|---|
| AllowRunOffline | Use this option to tell Runtime what to do if it cannot connect to Management Console. You have these choices:<br>Always – Runtime continues offline without prompting you.<br>Prompt – Runtime asks if you want to continue or exit.<br>Never – Runtime shows you a message and closes.<br>The default is Always. |

## Running Studio offline

If you want to run Studio offline, you can simply set the enabled option to false in the CommonConfig.xml file. Here is an example:

```
<ServerConfiguration tenant="CompanyName">
  <Servers>
   <Server name="Config" baseURL="http://ows.openspan.com/" enabled="false" />
  </Servers>
</ServerConfiguration>
<ConfigurationLocation>ApplicationData</ConfigurationLocation>
```

Or, you can go to the Tools > Options dialog in Studio and uncheck the Server Connectivity Connect to Server check box.



| Note | If the ADFS options are set up, the Connectivity dialog does not appear. The system logs in the user automatically. |
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