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Using OpenSpan Management Console

21 October 2014

This manual tells you how to set up and use OpenSpan Management Console (OMC), for use with OpenSpan Studio version 6.1 and higher. Use this table to quickly find the information you need:

For	See
General information on OpenSpan Management Console.	"Overview" on page 2
Information on what you need to log in to OpenSpan Management Console.	"Requirements" on page 5
Definitions of the terms used in this manual.	"Terminology" on page 6
Instructions on signing in, getting started, and what to do if you forget your password.	"Getting Started" on page 10
Information on editing your user profile and exiting OpenSpan Management Console.	"Using the User Menu" on page 16
Instructions on using the department hierarchy, adding departments, and editing department information.	"Managing Departments" on page 18
Instructions on adding users, editing user information, activating users, resetting passwords, and moving users.	"Managing Users" on page 23
Information on assigning packages and setting up deployment levels.	"Managing Packages" on page 39
Information on modifying the RuntimeConfig.xml file.	"Customizing the RuntimeConfig File" on page 54
Accessing documentation and granting access to the portal.	"Getting Help" on page 58
Connecting to OpenSpan Studio and OpenSpan Runtime.	"Connecting to Studio and Runtime" on page 60

Note See the OpenSpan Help (help.openspan.com) for information on OpenSpan Studio.

Public

Contents

Chapter 1: USING OPENSPAN MANAGEMENT CONSOLE

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

Overview

Organizations using OpenSpan – large and small, across every industry, rely on OpenSpan Desktop Automation to transform and accelerate critical operational processes to achieve significant efficiency gains. OpenSpan Management Console extends these efficiencies by enabling administrators to configure, manage and deploy OpenSpan projects from a centralized portal. With OpenSpan 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, OpenSpan 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 OpenSpan Management Console, users have instant access to all Runtimes – including the ability to push updates to OpenSpan 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.

OpenSpan Management Console (OMC) 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 OMC. While implementation time is unavoidable, the scalability of OMC 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 OpenSpan projects and Runtime users with ease. OMC 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 OpenSpan Runtime users inherit the configuration settings and package assignments for their department.
- Each OpenSpan Runtime user can have different configuration settings and package assignments if specific exceptions are required.

Easy Package Management

When changes to OpenSpan Runtime packages are required, an administrator needs a fast and easy-to-maneuver solution to deploy changes throughout the enterprise. OMC 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 OMC.
- Stored in OMC, 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 OMC.
- 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. OpenSpan 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 OpenSpan Runtime user. This eliminates the need to install updates at each workstation, saving time and conserving IT resources. The intuitive, user-friendly OpenSpan Management Console enables any OpenSpan 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 OpenSpan Management Console, administrations have the ability to add, display and maintain all configuration settings for each OpenSpan Runtime user. Through OMC, 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 un unprecedented degree of remote management and configuration, saving time and money.

Ironclad Security

OpenSpan Management Console employs a series of multi-layered security protocols designed to ensure secure data transfer, data integrity and confidentiality. OpenSpan does not transmit or store client data in any way. Configuration and OpenSpan project data are the only types of data that are transmitted and stored. OpenSpan 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 OpenSpan 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. OpenSpan Management Console data is backed up daily and is restorable in just 15 minutes. In addition, administrators have the ability to grant temporary access to their server instance to OpenSpan 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 OpenSpan Management Console are minimal. You just need a device with a supported browser, like Internet Explorer or Mozilla Firefox. This table shows the browsers OpenSpan uses in testing the OpenSpan Management Console:

Component	OpenSpan tests with
Browser	Internet Explorer version 9
	Mozilla Firefox version 22
Resolution	1024x768

For more information about the system requirements for other OpenSpan products managed by the OpenSpan Management Console, see the respective Installation Guides, available from the OpenSpan Support Center:

For	See
OpenSpan Runtime	OpenSpan Runtime Installation Instructions
OpenSpan Studio (standalone)	OpenSpan Studio Installation Instructions
OpenSpan Studio (plug-in)	OpenSpan Plug-in for Microsoft Visual Studio 2010 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 OpenSpan 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 OpenSpan 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 60.

departments

This refers to the organizational divisions within each tenant. For instance, this example shows a departmental hierarchy with several layers of subdepartments:
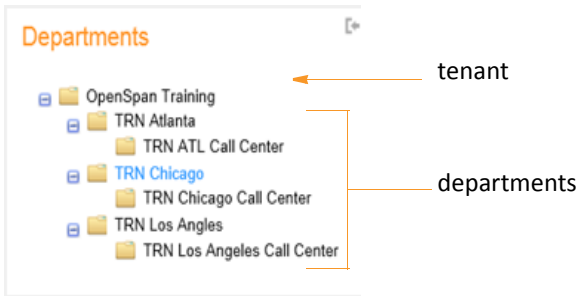
In the example, OpenSpan Training is the tenant and TRN Atlanta, TRN Chicago, and TRN Los Angeles are departments of that tenant. The divisions within each department, such as ATL Call Center are subdepartments, as are the teams in each division.

deployment level

Denotes the various stages an OpenSpan 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 OpenSpan users who will be creating solutions with OpenSpan Studio, either the standalone or plug-in version, for use with OpenSpan Runtime. These users will have both OpenSpan Studio and OpenSpan 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 OpenSpan Updater.

inheritance

To OpenSpan 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 OpenSpan 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 OpenSpan Management Console. These web services let you communicate with OpenSpan Management Console and other, future product offerings.

package

A package is a deployable [solution](#) ready to be used by OpenSpan 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

OpenSpan Studio bundles functionality in project items. OpenSpan 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.

solution

Within OpenSpan 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 OpenSpan Management Console, it is known as a [package](#).

RuntimeConfig.xml

The RuntimeConfig.xml file contains the configuration settings primarily used by OpenSpan Runtime. OpenSpan Runtime is installed as a standalone application and also with an OpenSpan Studio installation. While you can use any XML file editor to make changes to this file, OpenSpan 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 RuntimConfig.xml file is also missing from the installation directory, OpenSpan 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 OpenSpan Runtime. This tool is installed with OpenSpan Updater.

Using OpenSpan Management Console
Version 6.1 and higher

P ublic

Runtime-only users

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

Contrast with developer users.

StudioConfig.xml

The StudioConfig.xml file contains the configuration settings used by OpenSpan 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 OpenSpan Runtime could be 6.2.13.0.

Getting Started

OpenSpan 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 OpenSpan Studio to a secure, cloud-based server that is accessible to all of your OpenSpan Runtime users.

This topic helps you get started using OpenSpan 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

OpenSpan 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.
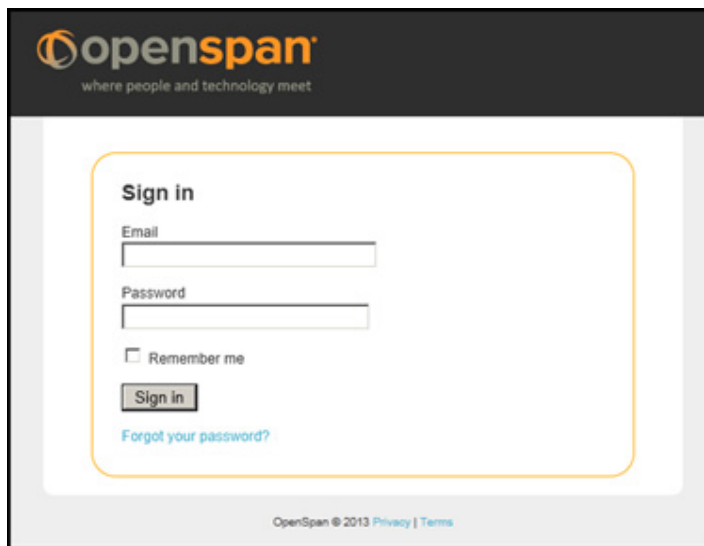
To sign in to OpenSpan Management Console follow these instructions:

Note	To exit OpenSpan 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.
	If you forget your password, see "Forgot Your Password?" on page 15 for more information.
	After five failed sign in attempts in a row, your account is locked for one hour.

OpenSpan Management Console's home page appears:
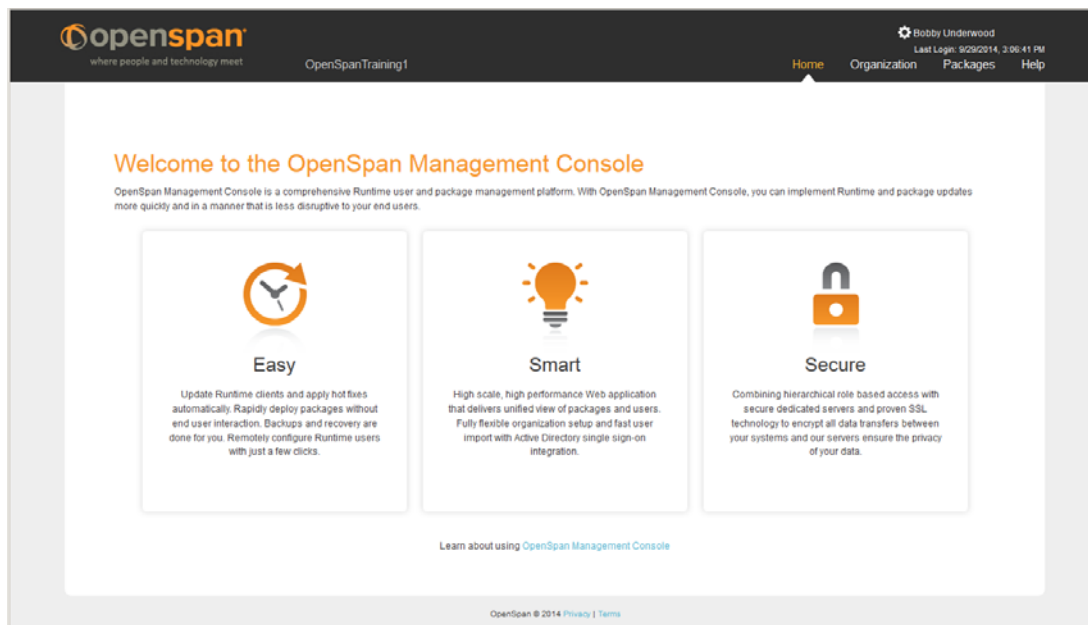
You are now signed in to OpenSpan Management Console.

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:
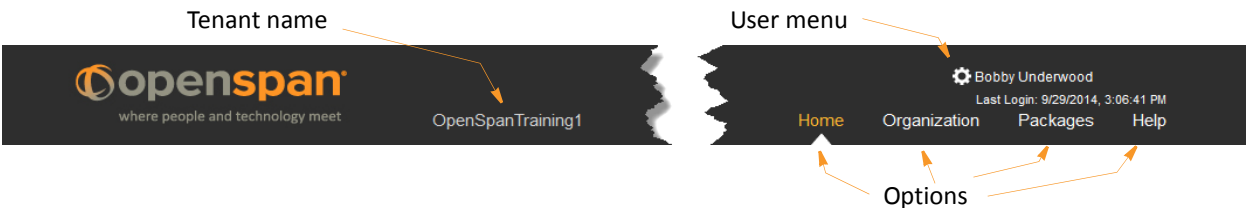

All of the main tasks you can perform with the OpenSpan Management Console are available from the banner.

Item	Description
Tenant	Here you see the name of your organization.
User menu	Click the Cog icon to edit your profile or sign out. 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. Defining your departments and users is typically the first tasks you perform with OpenSpan 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. For more information, see "Managing Packages" on page 39.
Help	Click this option to access the documentation, go to the OpenSpan Support Center, go to the OpenSpan Community forum, and grant access to your server portal. For more information, see "Getting Help" on page 58.

Defining Your Organization

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

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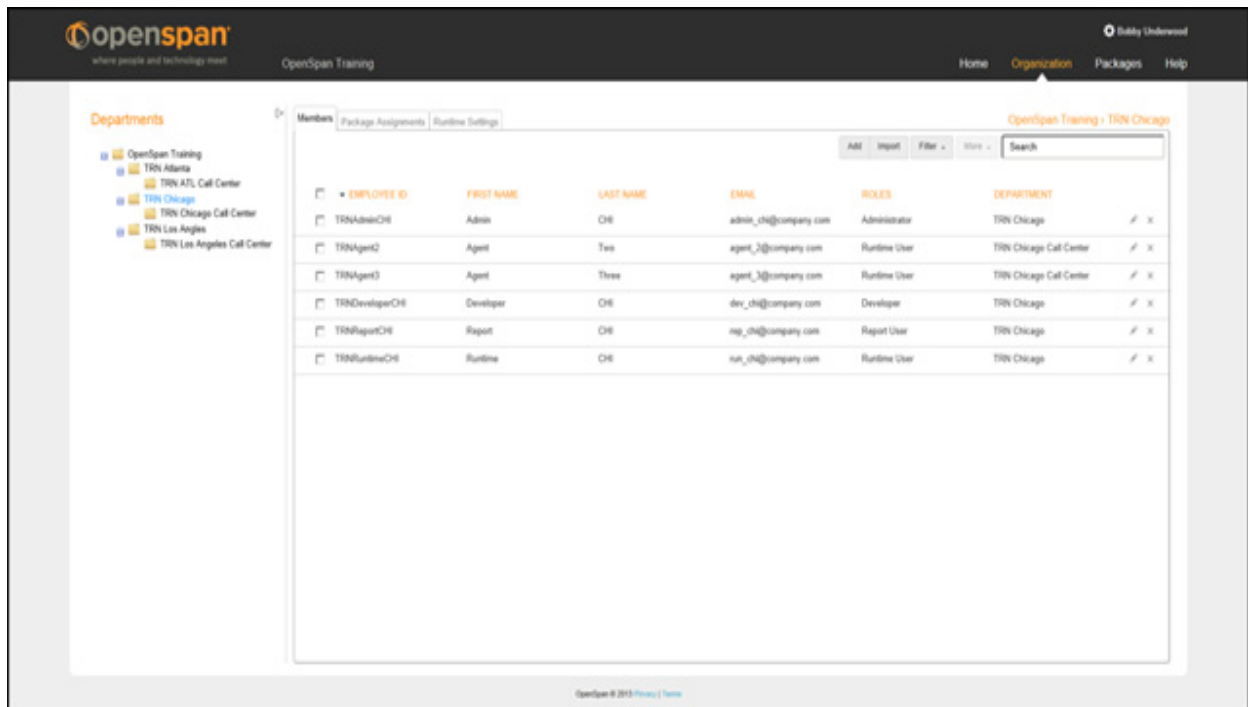

This page shows a departmental hierarchy on the left and these tabs on the right:

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 OpenSpan Studio.
Runtime Settings	Customize the configuration settings for OpenSpan 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:
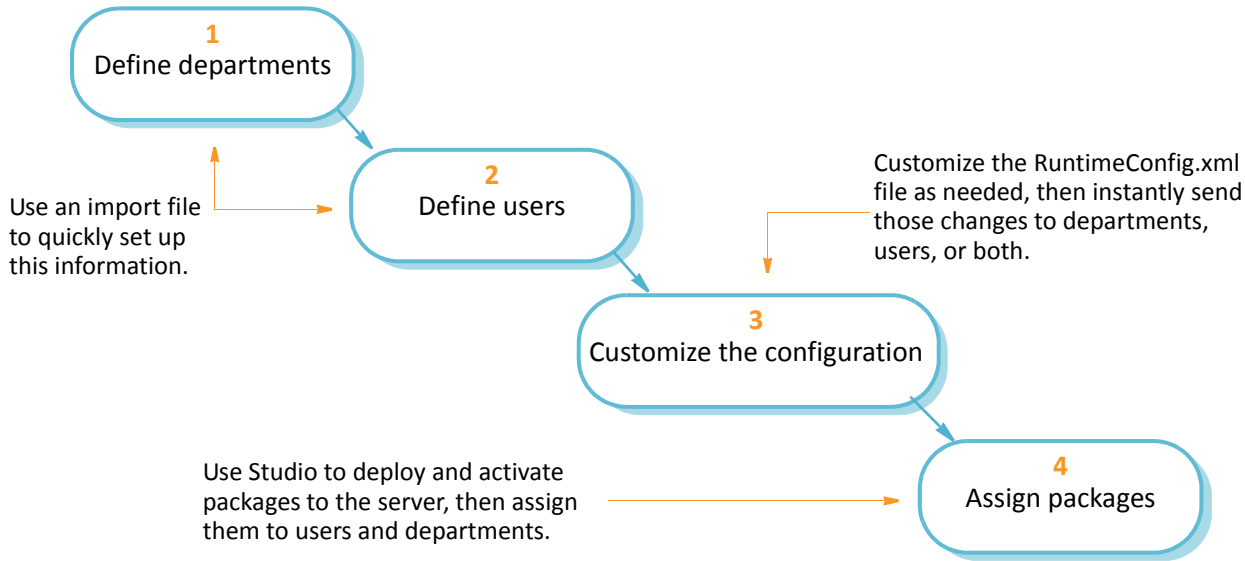
| For more information on	See
Defining departments	"Adding Departments" on page 19
Defining users	"Adding Users" on page 24
Importing departments and users	"Importing Department and User Information" on page 26
Customizing the configuration	"Customizing the RuntimeConfig File" on page 54.
Assigning packages	"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.
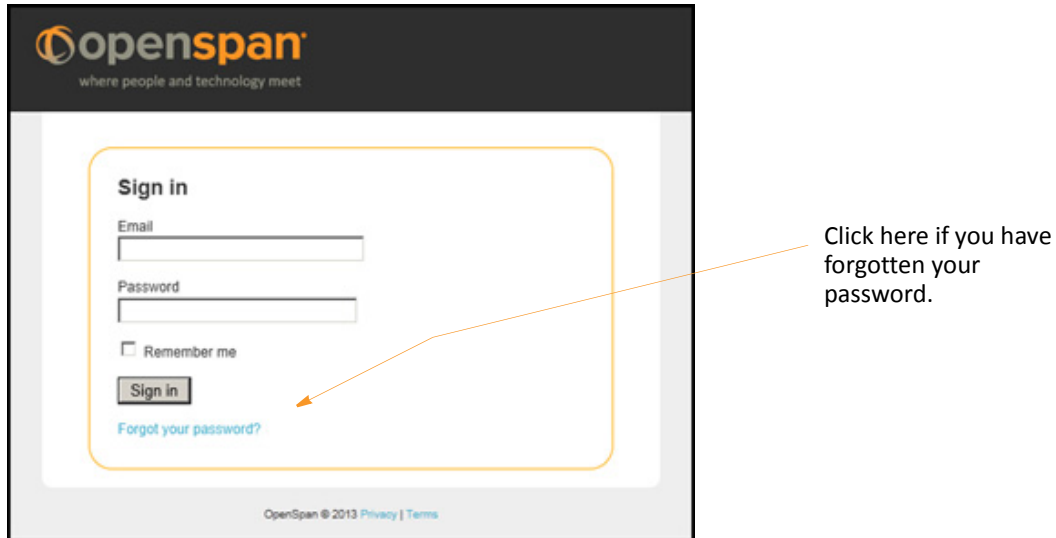
The Forgot Your Password page appears.

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.

    Profile
    Sign out 🖱

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: Firstname.Lastname@openspan.com You can enter up to 255 characters. **Note**: The OpenSpan 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: UserName@InternetDomain
New password	Enter the new password you want to use. Your password must meet this criteria: • Must contain at least eight characters. • Must include at least one lowercase letter, one uppercase letter, and one numeral. • May not be one of your last six passwords. • 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 OpenSpan Management Console. Merely clicking the **X** icon to close the tab in your browser *does not* sign you out.
	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 OpenSpan 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.
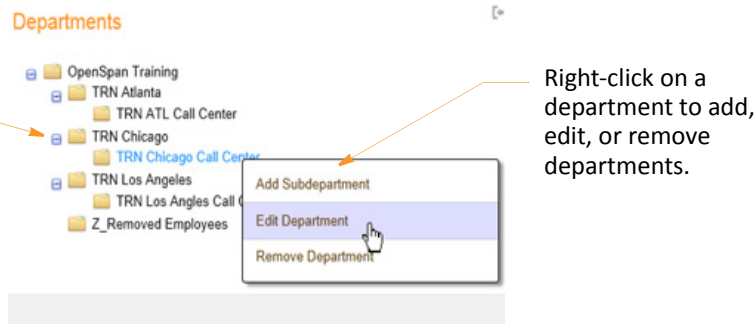
When you click on a tenant, department or subdepartment, the associated users appear on the right.

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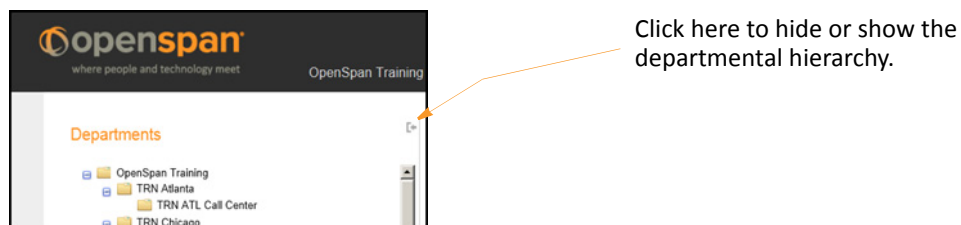
Once hidden, you will see a Show Departments link on the page. Click this link if you want to show the department hierarchy.

Using OpenSpan Management Console
Version 6.1 and higher

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.
	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 (@).
	This name is case sensitive.
Code	Enter the code assigned to the department.
	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*.
	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.
	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.
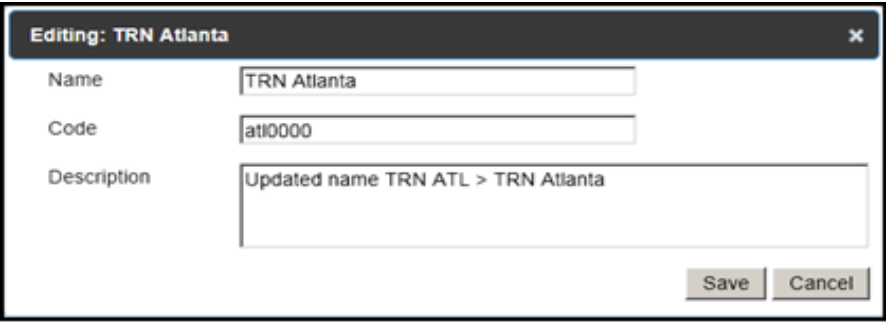
> For reporting purposes, you cannot delete a user, you can only deactivate a user. To handle users who leave your organization permanently, create a department called, for instance, *Sacked*, and drag and drop those users into that department.

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.
	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 (@).
	This name is case sensitive.
Code	The code assigned to the department.
	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*.
	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.
	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.
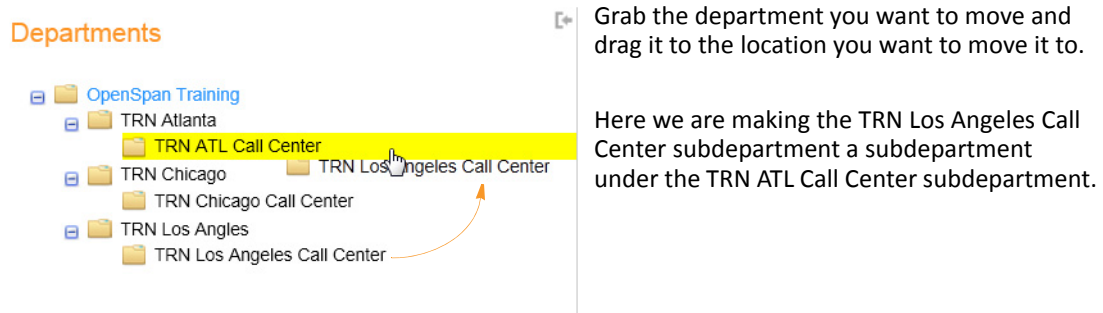
3. Release the mouse button to drop the subdepartments under the highlighted department.

The TRN Los Angeles Call Center subdepartment is now a subdepartment under the TRN Atlanta subdepartment.
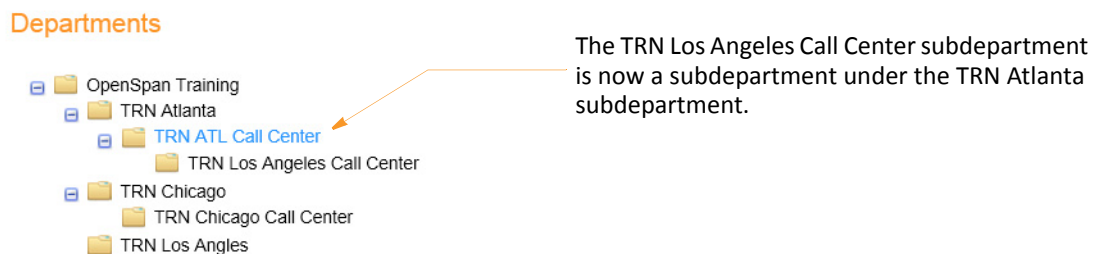
Customizing a Department's Runtime Settings

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 55.

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:

Click here to sort on this column heading.

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 OpenSpan. This user receives the initial access to OpenSpan 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.
	You can enter up to 25 characters. You can include letters, numbers, dashes, underscores, parentheses, apostrophes, and spaces
	This ID is case insensitive.
First name	Enter the user's first name.
	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. 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: Firstname.Lastname@openspan.com You can enter up to 255 characters, including letters, numbers, periods, dashes, underscores, apostrophes, and plus signs (+). **Note**: OMC 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. **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: • Administrator • Developer • Report User • Runtime User • OSI Super Admin You can click the Add icon to add additional role assignments to a user. See "Adding Roles" on page 28 for more information. 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. **Note**: The OSI Super Admin role is only used with OpenSpan 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 OpenSpan 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.
	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:

You can find an import file template on the OpenSpan 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. • The field is case insensitive. • If this field is omitted and you are adding a user, the system adds the user at the root department node (top most department). • If this field is omitted and you are updating user information, the user's department is unchanged. • 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). • 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. • 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. • 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. • If this field is blank and you are adding a user, the system defaults to Runtime User. • 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. • 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.
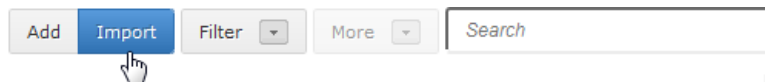
The Import Users window appears.

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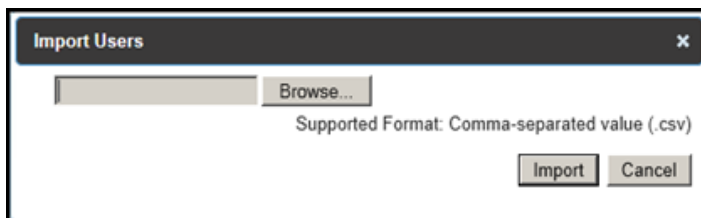
4. Once you locate the file, click the Import button. The users listed in the file are imported into the system. The system displays a progress window to show you the status of the import.

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.
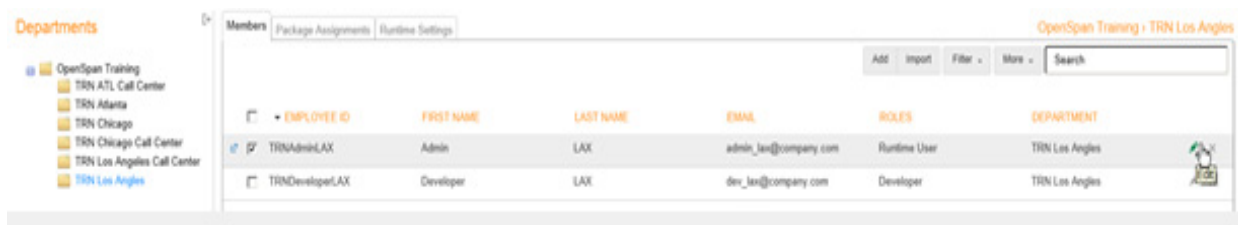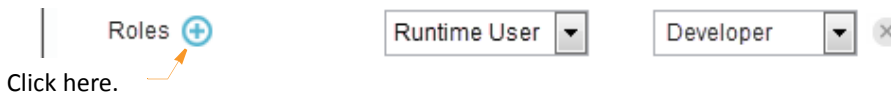

3. Click the Edit icon for that user.

The Edit User window appears.

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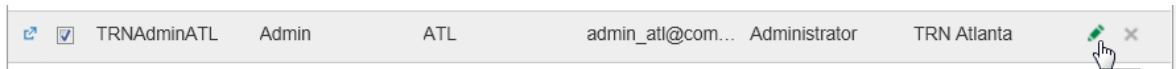

Click here.

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

Permission	Administrator	Developer	Report User	Runtime User
Use the OpenSpan Management Console web site	✓	✓	✓	
Grant portal access to OpenSpan Support	✓			
View restricted fields (UPN)	✓			
Use OpenSpan Studio	✓	✓		
Use OpenSpan Runtime	✓	✓		✓
View Runtime audit trails	✓	✓		
Departments				
View department information	✓	✓	✓	
Note: The OSI Super Admin role is only used with OpenSpan WorkForce Intelligence.				

Permission	Administrator	Developer	Report User	Runtime User
Create departments	✓			
Update department information	✓			
Delete departments	✓			
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 OpenSpan 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.
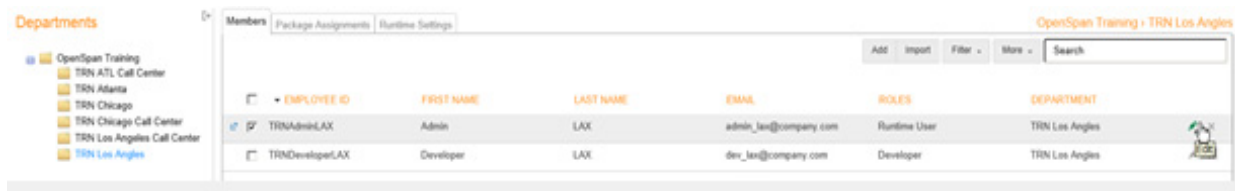
3. Click the Edit icon for that user.

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.

Tab	Description
Package Assignments	Click this tab to assign packages to a user. For more information, see "Assigning packages" on page 33.
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 or the user's 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. You can include letters, numbers, dashes, underscores, parentheses, apostrophes, and spaces.
First name	The user's first name. 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. 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: Firstname.Lastname@openspan.com You can enter up to 255 characters, including letters, numbers, periods, dashes, underscores, apostrophes, and plus signs (+). **Note**: OMC 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: UserName@InternetDomain 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. **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: • Administrator • Developer • Report User • Runtime User • OSI Super Admin You can also click add a role assignment to a user. See "Adding Roles" on page 28 for more information. 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. **Note**: The OSI Super Admin role is only used with OpenSpan 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:

Click here to assign a package.　　Click here to remove a package.

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.

Field	Description
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.

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:

Click here to remove a package assignment.

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 55.

Using the Runtime Audit Trail

OpenSpan Management Console provides a daily audit trail for each OpenSpan Runtime user. This lets you see…

■ Sign in attempts
■ Which packages the user received
■ When the user received the packages
■ Authentication attempts
■ Exceptions

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

1. Click the Runtime Audit Trail tab. The system shows you the packages assigned to this user:
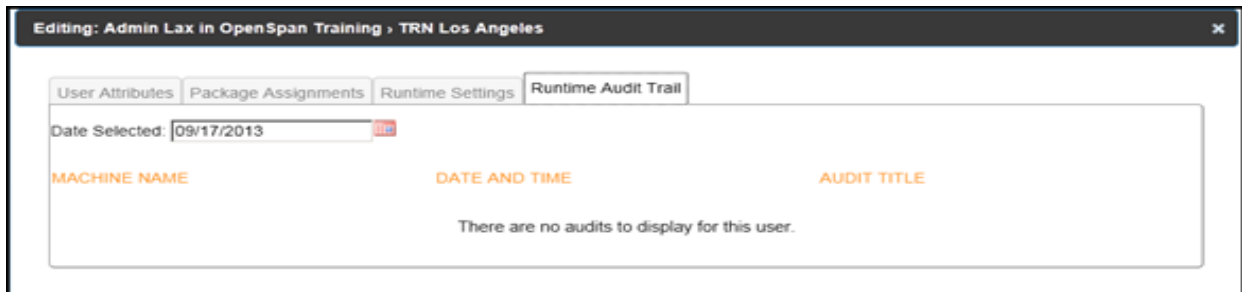
You can click on the column headings to sort the information.

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.
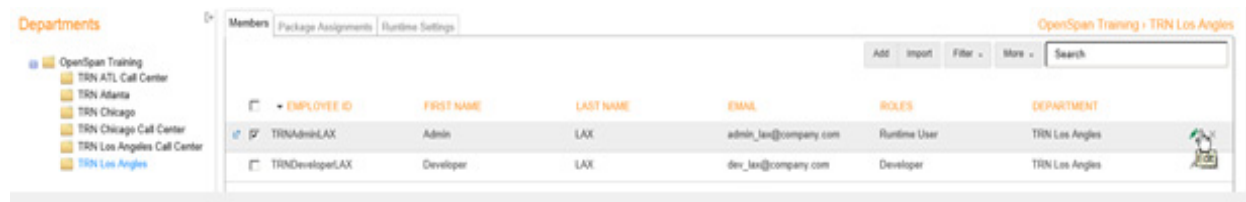
3. Click the Edit icon for that user.

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.
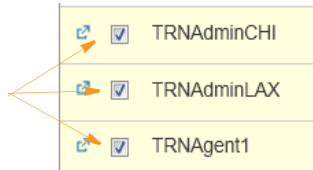
3. Click the More menu and select the Reset Passwords option.
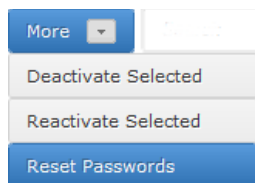
    A message appears to tell you OpenSpan Management Console sent Password Reset emails.

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.
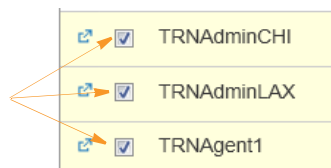
3. Click the More menu and select Deactivate Selected.
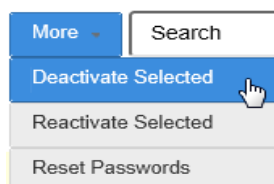
    A message appears that lets you confirm you want to deactivate the selected users.

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.
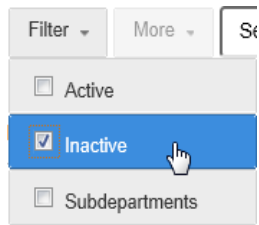
3.   Click the check boxes beside the users you want to reactivate.

4.   Click the More menu and select Reactivate Selected.
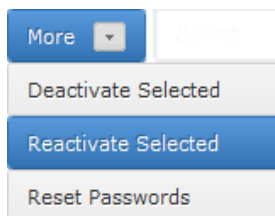
A message appears that lets you confirm you want to reactivate the selected users.

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.

		TRNAgent4	Agent	Four	agent_4@comp…	Runtime User	TRN Los Angele…		

Grab this icon to move this user.
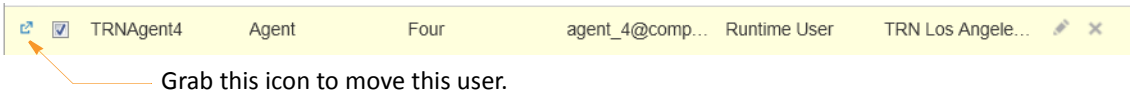
Note	You can select and move multiple users at a time.

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. OpenSpan Management Console helps you manage the testing and implementation stages.

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

OpenSpan Studio
- Create solution
- Build package
- Deploy package

OpenSpan Management Console
- Manage packages through various deployment levels
- Distribute packages in Production to Runtime users

OpenSpan Runtime
- Select the package
- Run the package
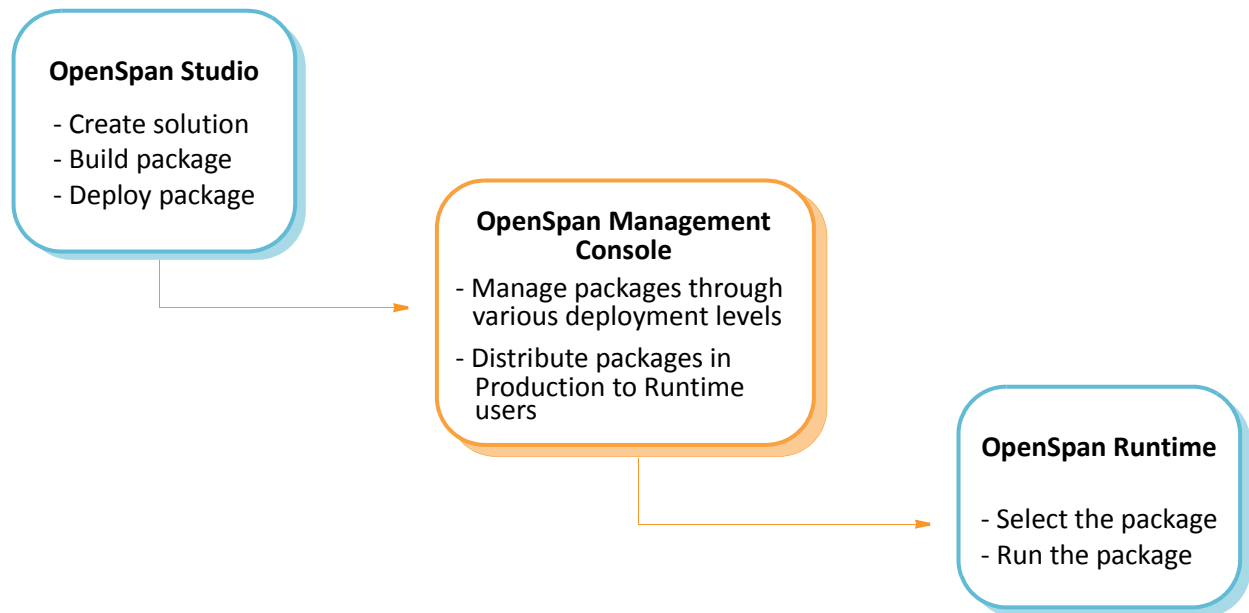
Note For more information on creating and deploying solutions in Studio, see the OpenSpan Help (help.openspan.com).

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, OpenSpan Management Console compares the local, Runtime version to the version in Production. If there are any differences, OpenSpan Management Console makes available the version it has in Production.

Note OpenSpan 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, OpenSpan 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 an OpenSpan 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:

Development

User Acceptance
Testing (UAT)

You define any deployment levels
that fall between the system-
defined deployment levels.

Staging

System-defined
deployment levels

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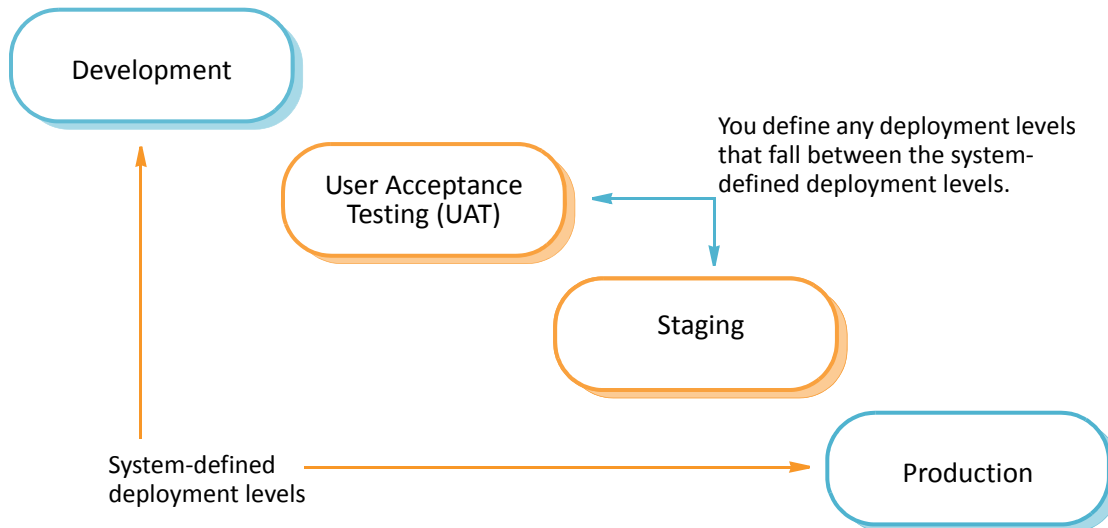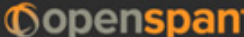
You can add as many deployment levels as you need to show how an OpenSpan solution flows through your organization and you can assign any name you want to the deployment levels you create.

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:

New Level ✔ ⊗

      Click to cancel.

      Click to save this deployment level.

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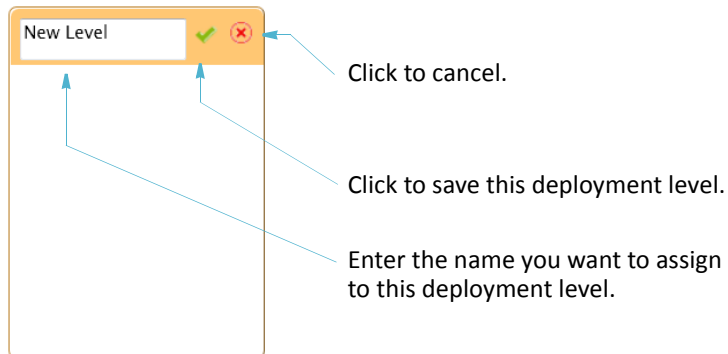
4. Enter the name you want to assign to the deployment level. You can enter up to 20 characters, including spaces. Then click the Save icon (✔). The system adds the deployment level to the package.

Modifying Deployment Level Names

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

1. Click the Edit icon.

UAT ☑

✔ 1.2
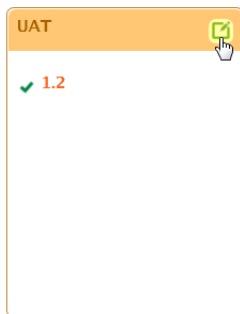
2. Enter the new name in the Name field and click the Save icon (✔).

Staffing ✔ ⊗

✔ 1.2
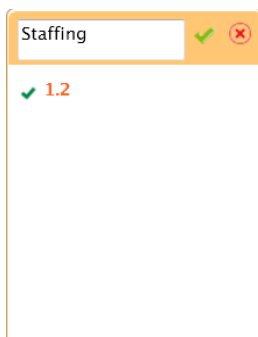
Deleting Deployment Levels

To delete a deployment level, click the Remove icon.
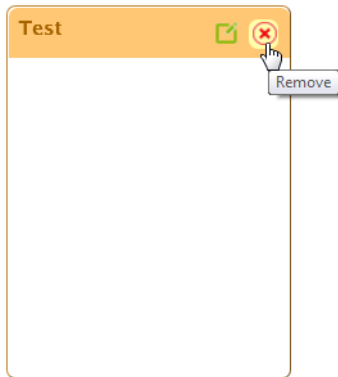
Note	You can only delete a deployment level if it has not yet contained a package.

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.
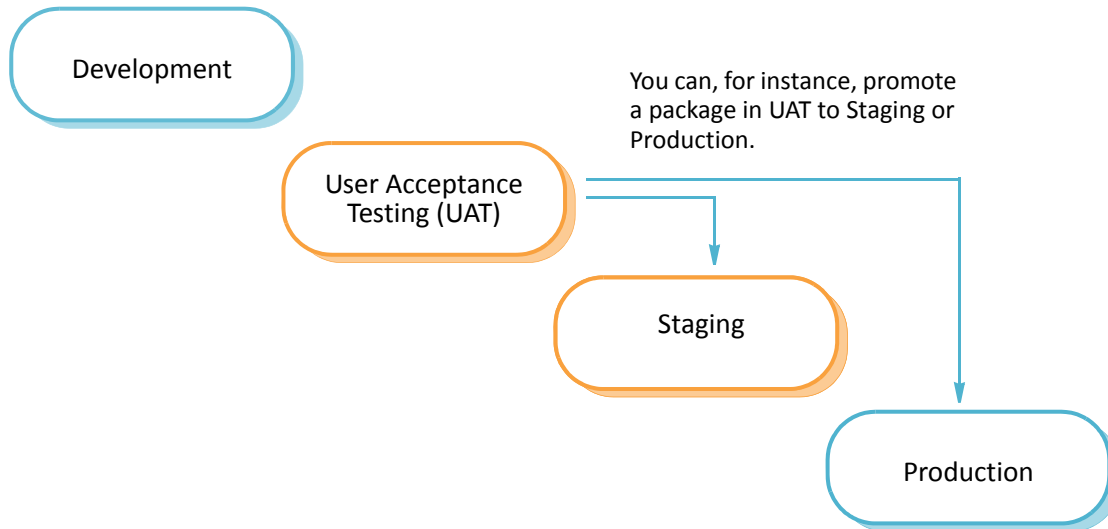
When promoting packages, keep in mind…

- 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.
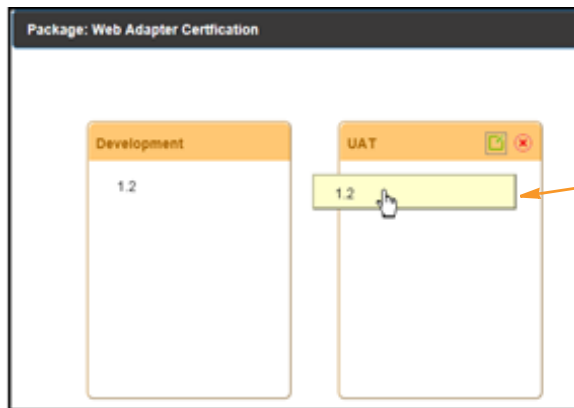

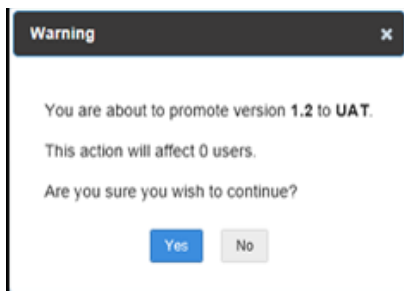Click here to see the deployment levels for this package.

The deployment level window appears:

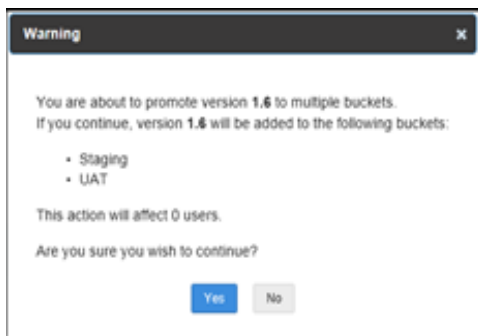3. Highlight the version you want to promote, then drag it to the appropriate development level.

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.
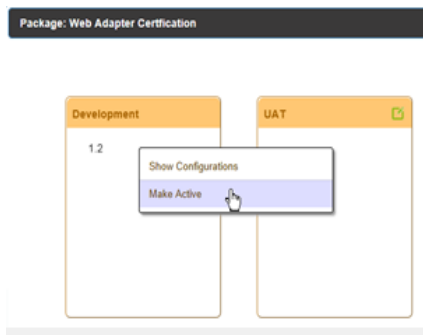

2. Choose the Make Active option.

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.
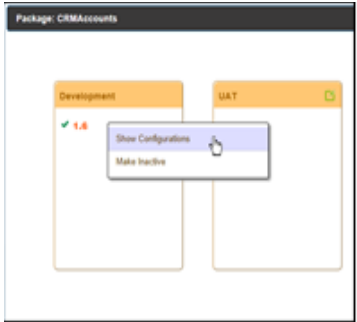
2. Choose the Show Configurations option. The system shows you the configuration file for the package you selected.
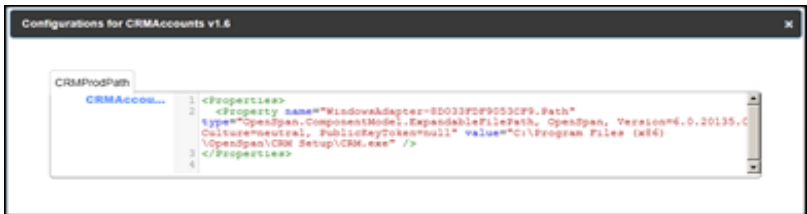
3. Review the file as needed. For information on making changes to the settings in the file, see "Customizing the RuntimeConfig File" on page 54.

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. 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. See "Assigning packages" on page 33 for more information.

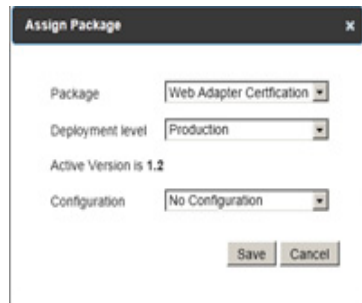**Assigning Packages to a Department**

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.

Using OpenSpan Management Console
Version 6.1 and higher

Revised: 29 September 2015
51
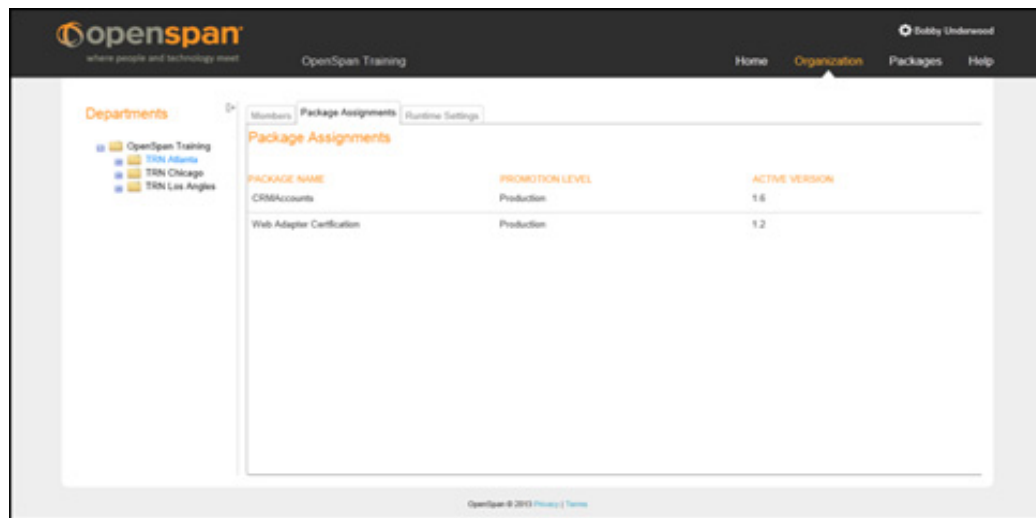
> If you need to make an assignment to some but not all members of a department, you can either make individual assignments to each user or create a temporary department and move those users into that temporary department. Once the assignment is over, move the users back into their regular department.

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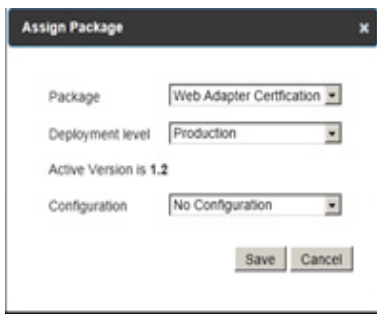
5. Click the Package Assignments tab. The system shows you the packages already assigned to this user, along with the deployment level, active version, and the configuration being used:

Click here to assign a package.

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

Using OpenSpan Management Console
Version 6.1 and higher

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.

Customizing the RuntimeConfig File

The OpenSpan provides two ways to easily view and edit the RuntimeConfig.xml file, which contains the configuration settings for OpenSpan 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 OpenSpan Runtime encounters exceptions
- Define which events are recorded
- Specify general application settings, like what project should be loaded automatically when OpenSpan Runtime starts

Note You can find detailed information on all the options in the RuntimeConfig.xml file in the OpenSpan Help. See this page for more information:

http://help.openspan.com/62/Platform_Configuration/RuntimeConfigXML.htm

The original RuntimeConfig.xml file from OpenSpan, will appear at the uppermost or root department level of the department hierarchy. This file — unless you change it — contains the default values from OpenSpan.
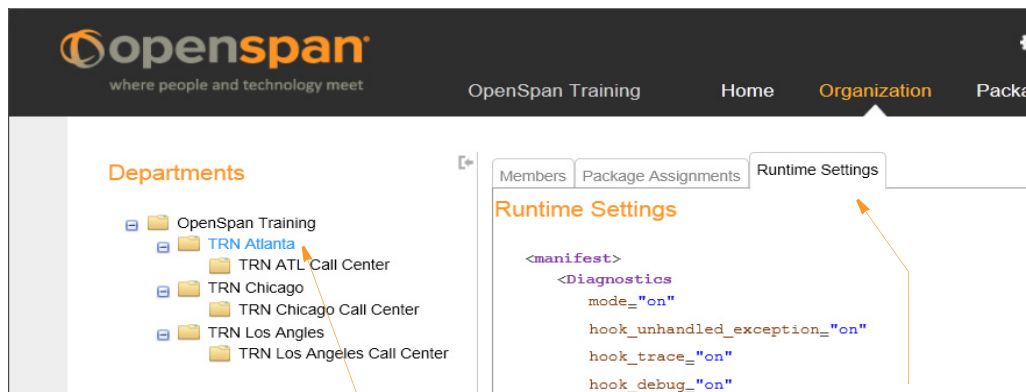
Modifying a Department's Configuration

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:

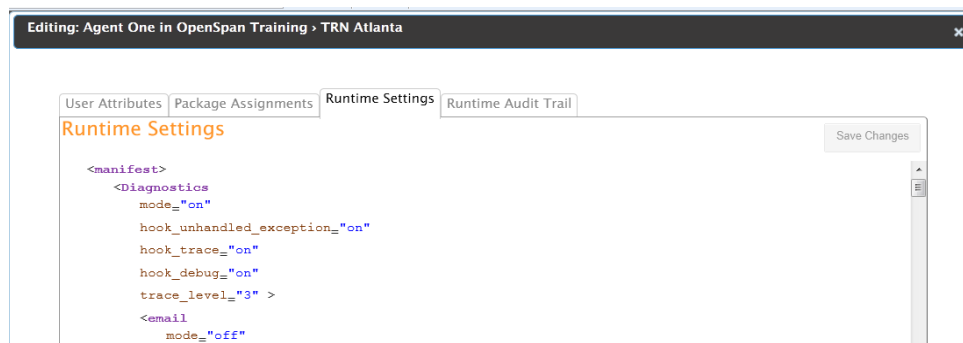4. See "Modifying the RuntimeConfig.xml FIle" on page 56 for more information.

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.

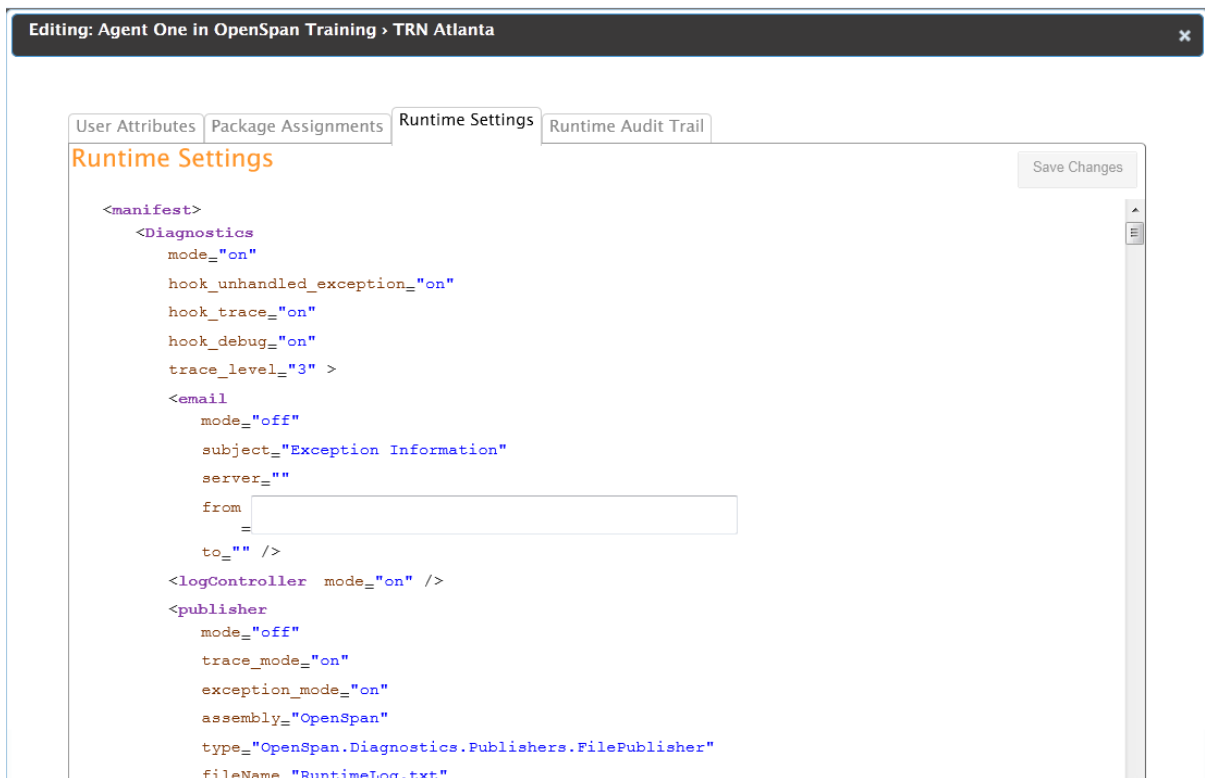5. See "Modifying the RuntimeConfig.xml FIle" on page 56 for more information.

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:

Editing: Agent One in OpenSpan Training › TRN Atlanta ✕

User Attributes | Package Assignments | **Runtime Settings** | Runtime Audit Trail

Runtime Settings   Save Changes

```
<manifest>
    <Diagnostics
        mode_"on"
        hook_unhandled_exception_"on"
        hook_trace_"on"
        hook_debug_"on"
        trace_level_"3" >
        <email
            mode_"off"
            subject_"Exception Information"
            server_""
            from
                =
            to_"" />
        <logController  mode_"on" />
        <publisher
            mode_"off"
            trace_mode_"on"
            exception_mode_"on"
            assembly_"OpenSpan"
            type_"OpenSpan.Diagnostics.Publishers.FilePublisher"
            fileName_"RuntimeLog.txt"
```

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"
        secondsForIdle_"600"
```

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:

- OpenSpan Management Console documentation — Takes you to this documentation.
- Technical Support — Takes you to the OpenSpan 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 OpenSpan Community forum, where you can find answers to questions in an OpenSpan-monitored forum.

In addition, you can use this option to grant temporary access to an OpenSpan Support Engineer so the engineer can help you resolve an issue. See "Granting Access to the Portal" on page 58 for more information.
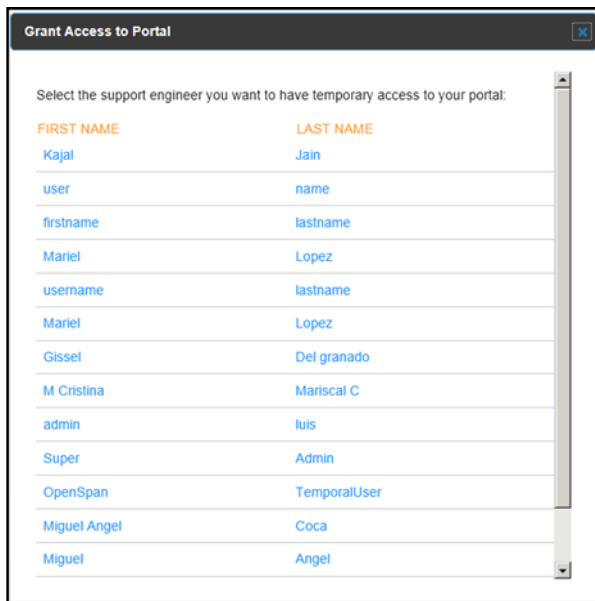
When you click the Help option in the banner, this page appears:
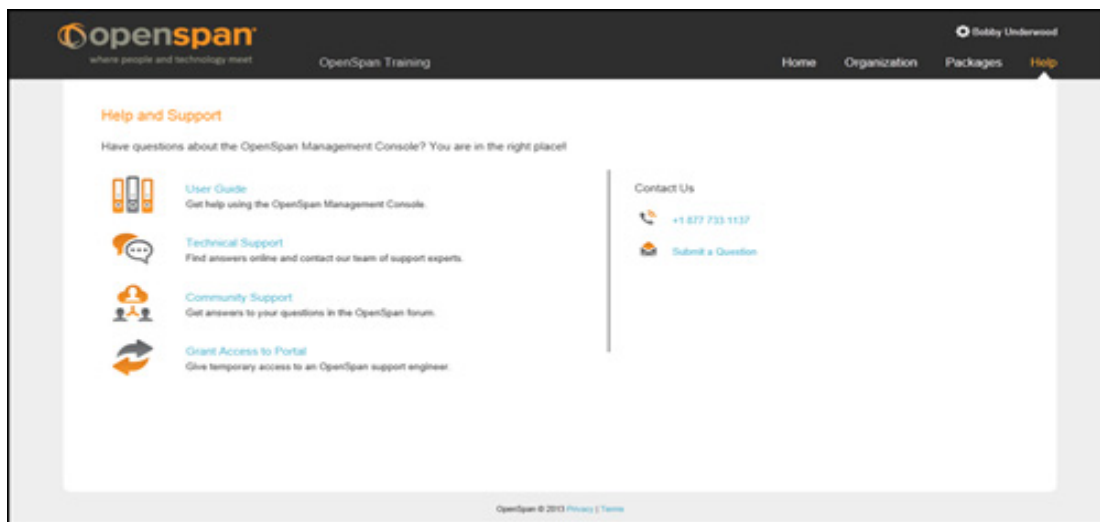
Granting Access to the Portal

If an issue arises, an OpenSpan Support Engineer may request access to your OpenSpan 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 OpenSpan 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 OpenSpan 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 OpenSpan applications.
Servers/Server/name	The name (type) of the server. For example, Config servers are used to authenticate and deliver configuration settings. 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. **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. You can enter absolute paths, environment variables, and SpecialFolders enumerated values, such as CommonApplicationData, LocalApplicationData, Documents, Personal, or Temporary. The default is ApplicationData. 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.

Using OpenSpan Management Console
Version 6.1 and higher

Public

Running OpenSpan Runtime Offline

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

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

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

Running OpenSpan Studio Offline

If you want to run OpenSpan 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.
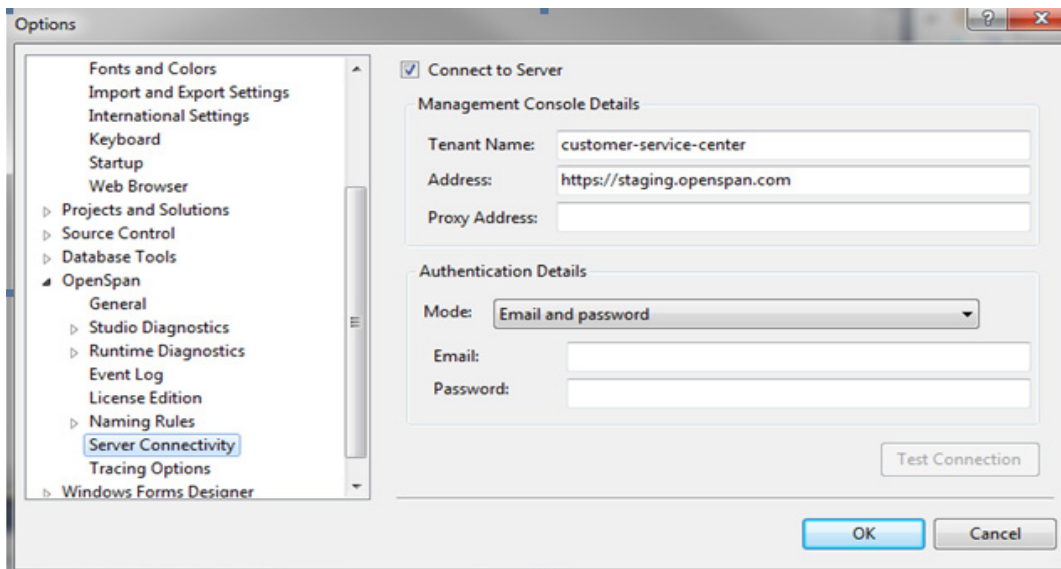
Note	If the ADFS options are set up, the Connectivity dialog does not appear. The system logs the user in automatically.

Using OpenSpan Management Console
Version 6.1 and higher

roles
   defined 28
Roles field 25, 33
Runtime Audit Trail tab 32, 35
Runtime Settings tab 13, 32
Runtime users
   defined 9
   role 25, 28
RuntimeConfig.xml file 54
   defined 8
   modifying 56
RuntimeLauncher
   defined 8

S

searching
   users 23
Send account activation instructions
      field 25, 32
Servers property 60
Show Configurations option 50
sign off 17
signing In 10
sorting
   package information 35
   users 23
spaces 27
staging 42
subdepartments
   defined 9
   moving 21
Support Engineer 59
system of record 26

T

temporary account 59
tenant
   defined 9
tenant property 60

U

underscores 27
UPN
   defined 9
user acceptance testing (UAT) 42
User Information tab 31, 32
user menu icon 16, 17
User principal name (UPN) field 16, 25,
      26, 32
users
   adding 24
   editing 31

moving 38
RuntimeConfig.xml file 55

W

web services 7

Using OpenSpan Management Console
Version 6.1 and higher