



SCORTO ADMINISTRATOR USER MANUAL

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1 INTRODUCTION

This manual provides detailed instructions on how to use the Scorto Administrator application and contains the following chapters:

Chapter 2, Application Overview, contains general information on how to use Scorto Administrator.

Chapter 3, Security Management, provides instructions on how to manage security using the Scorto Administrator application.

Chapter 4, System Management, provides instructions on how to manage the system using the Scorto Administrator application.

Audience

This manual is intended for those using Scorto Administrator.

Manual Conventions

This manual uses the following conventions:

- Dialog boxes and windows are displayed in italics, for example, "*Packages Installer* window".
- Buttons, tabs, check boxes, and other dialog box elements are displayed in bold, for example, "click **Next**" or "enter **Destination**".
- Cross-references are displayed in italics, for example, "see *Chapter 2, Application Overview*".
- Notes contain additional information related to the previous topic and are displayed in italics.

2 APPLICATION OVERVIEW

This chapter contains general information on how to use Scorto Administrator.

Overview

This chapter comprises the following sections:

Server Connection Setup, page 3, described the procedure for setting up a connection to the server.

Logging on to the System, page 12, explains how to log on to the system.

Server Connection Setup

Prior to using the application in the server-connected mode, a connection to the server must be set up.

The Scorto Administrator application allows the user to perform the following operations to set up a server connection:

- Adding a new connection profile;
- Editing an existing connection profile;
- Deleting an existing connection profile.

Adding a new connection profile

The Scorto Administrator application allows adding a new server connection profile.

To delete an existing server connection profile:

1. Find the shortcut to the Scorto Administrator application and start the application by double-clicking the shortcut.

The *Available connections* dialog box is displayed:

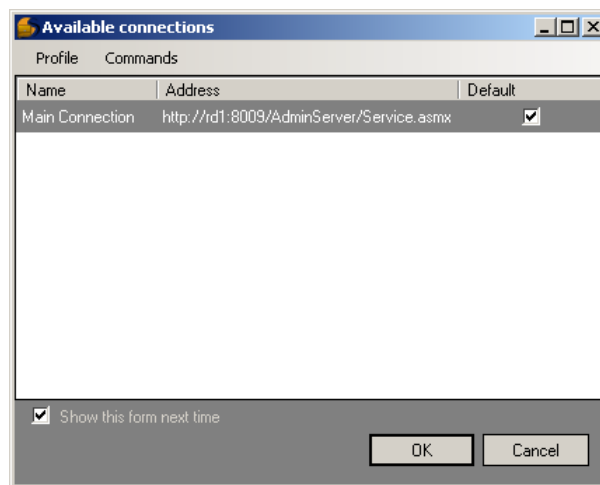


Figure 2-1: *Available connections* dialog box

2. From the **Commands** menu, select **Add**.

The *Connection Profile* dialog box is displayed:

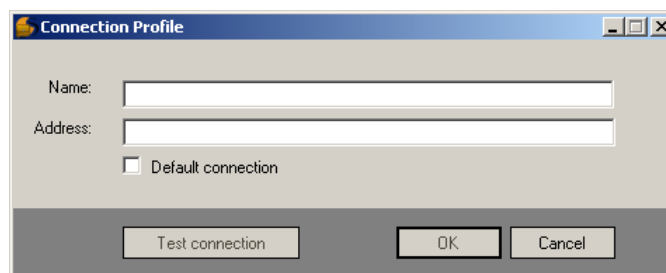


Figure 2-2: *Connection Profile* dialog box

3. In the Name box, enter the name of the connection.
4. In the **Address** box, enter the address of the server the application is to connect to.
5. Click **Test connection**.

If the connection cannot be established to the specified address, the following error message is displayed:

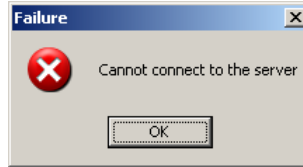


Figure 2-3: Server connection test error message

When the above error message is displayed, click **OK** and check that the address of the server is correctly specified; after correcting the address, repeat the server connection test procedure.

If the connection is successful, the following message is displayed:

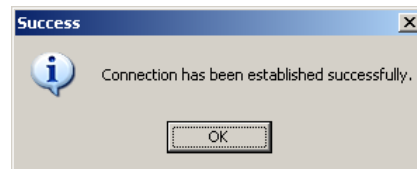


Figure 2-4: Connection successful

6. Click **OK**.

The created connection profile is displayed in the *Connection Profile* dialog box:

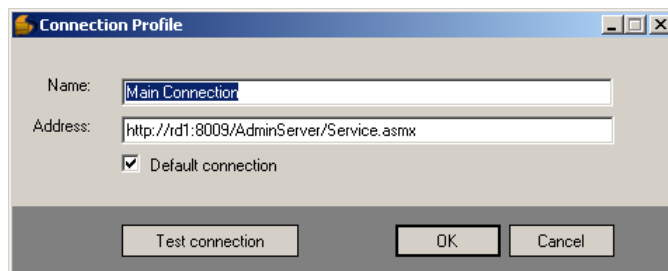


Figure 2-5: *Connection Profile* dialog box

Note: To make this connection the default one, check ☒ Default connection.

7. Click **OK**.

The created connection profile is displayed in the *Available Connections* dialog box:

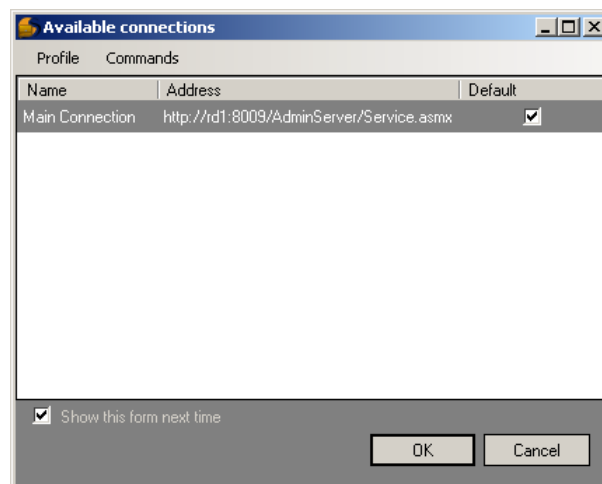


Figure 2-6: *Available connections* dialog box

Saving Connection Profile

The Scorto Administrator application allows saving a new server connection profile.

To save the connection profile:

1. Add a new connection profile as described in the above procedure *Adding a new connection* profile, page 3.
2. In the **Available Connections** dialog box, from the **Profile** menu select **Save**.

The added connection profile is successfully saved.

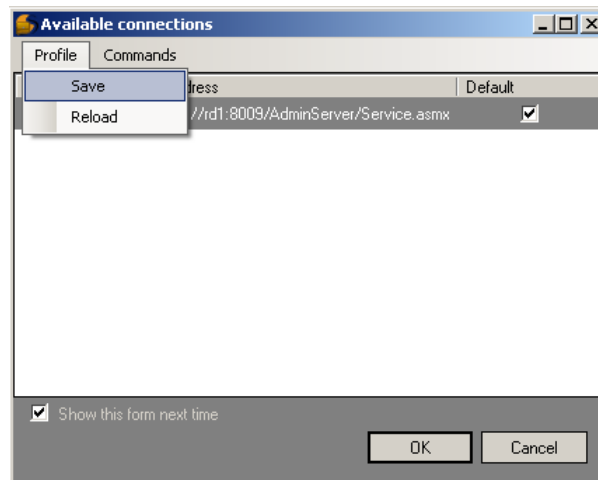


Figure 2-7: Saving Connection Profile

Editing Existing Connection Profile

The Scorto Administrator application allows editing an existing server connection profile.

To edit an existing connection profile:

1. Find the shortcut to the Scorto Administrator application and start the application by double-clicking the shortcut.

The *Available connections* dialog box is displayed:

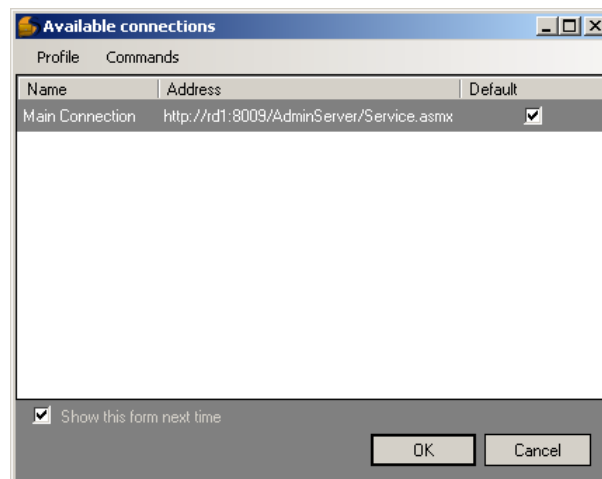


Figure 2-8: Available connections dialog box

2. Select the required connection.
3. From the main menu, select **Commands, Edit**.

The *Connection Profile* dialog box with the **Address** field already filled-in is displayed:

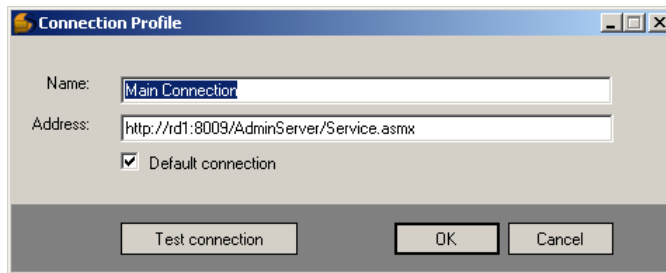


Figure 2-9: Connection Profile dialog box

4. Enter the appropriate changes.
5. Click **Test connection**.

If the connection cannot be established to the specified address, the following error message is displayed:

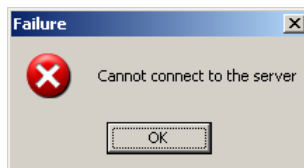


Figure 2-10: Server connection test error message

When the above error message is displayed, click **OK** and check that the address of the server is correctly specified; after correcting the address, repeat the server connection test procedure.

If the connection is successful, the following message is displayed:

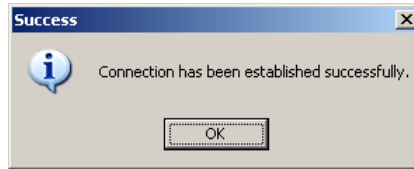


Figure 2-11: Connection successful

6. Click **OK**.

The edited connection profile is displayed in the *Connection Profile* dialog box:

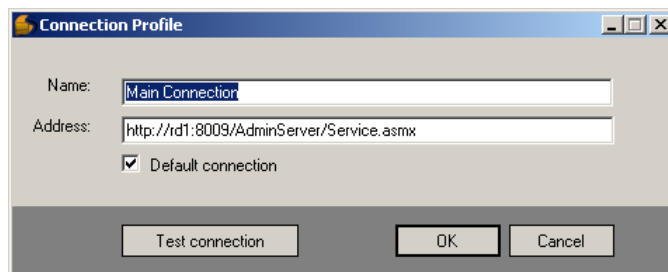


Figure 2-12: *Connection Profile* dialog box

7. Click **OK**.

The edited connection profile is displayed in the *Available Connections* dialog box:

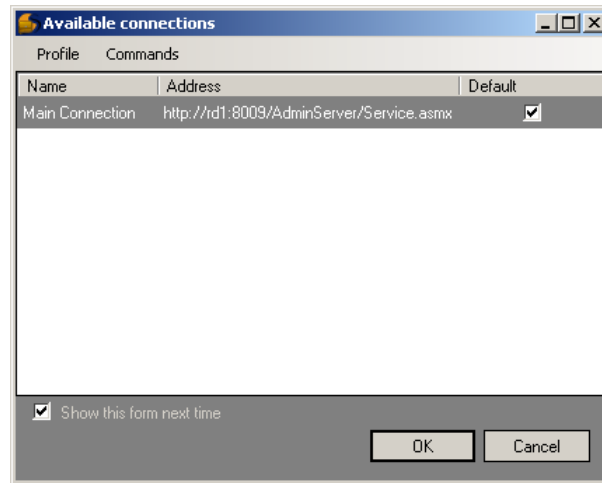


Figure 2-13: *Available connections* dialog box

Deleting Existing Connection Profile

The Scorto Administrator application allows deleting an existing server connection profile.

To delete an existing server connection profile:

1. Find the shortcut to the Scorto Administrator application and start the application by double-clicking the shortcut.

The *Available connections* dialog box is displayed:

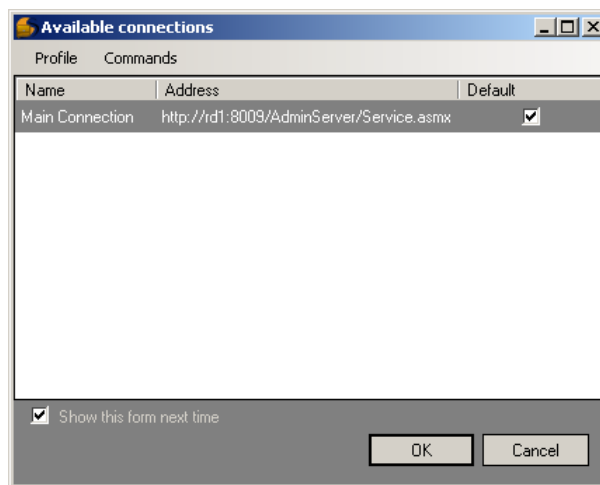


Figure 2-14: *Available connections* dialog box

2. Select the required connection.
3. From the main menu, select **Remove**.

The selected profile is successfully deleted:

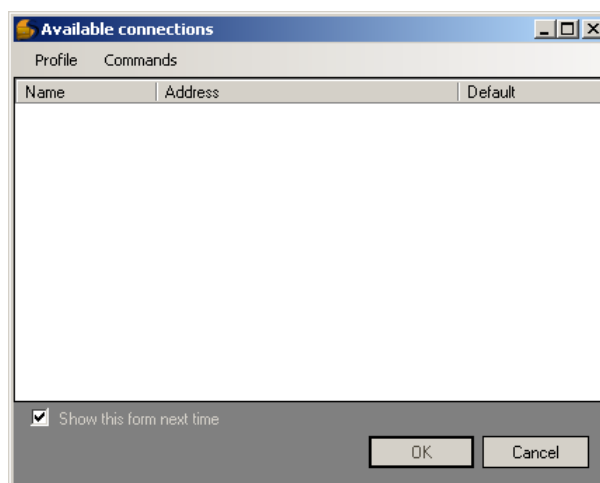


Figure 2-15: Selected profile is deleted

Logging on to the System

To be able to use the Scorto Administrator application, the user must have the appropriate account registered in the database and have the right to use this application.

The Scorto Administrator application prevents the user from logging on to the system using the same user account from more than one workstation.

To log on to the system:

1. Find the shortcut to the Scorto Administrator application and start the application by double-clicking the shortcut.

The *Available connections* dialog box is displayed:

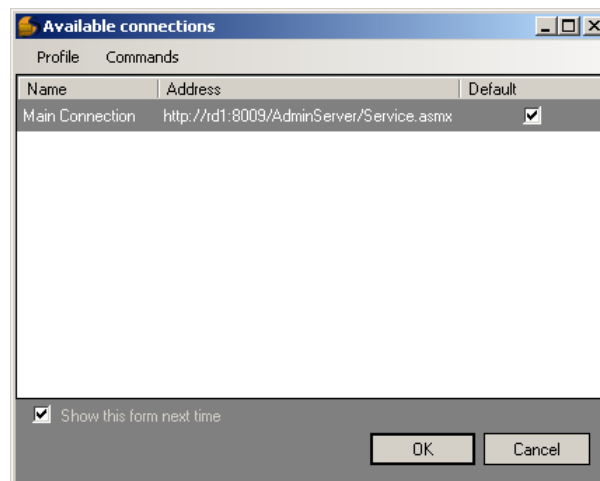


Figure 2-16: *Available connections* dialog box

2. In the **Address** column, select the address of the server to connect to and click **OK**.

The *Login* dialog box is displayed:

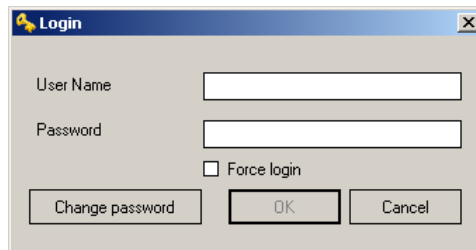


Figure 2-17: *Login* dialog box

3. In the **User Name** box, enter the username.
4. In the **Password** box, enter the password.

Note:

The "Force Login" function is intended to allow the user who has already logged on to the system, to log on to the system from another workstation. The initial connection is closed and a new connection is established for another workstation.

*To perform a force login, check the **Force login** check-box.*

5. Click **OK**.

The Scorto Administrator application is started:

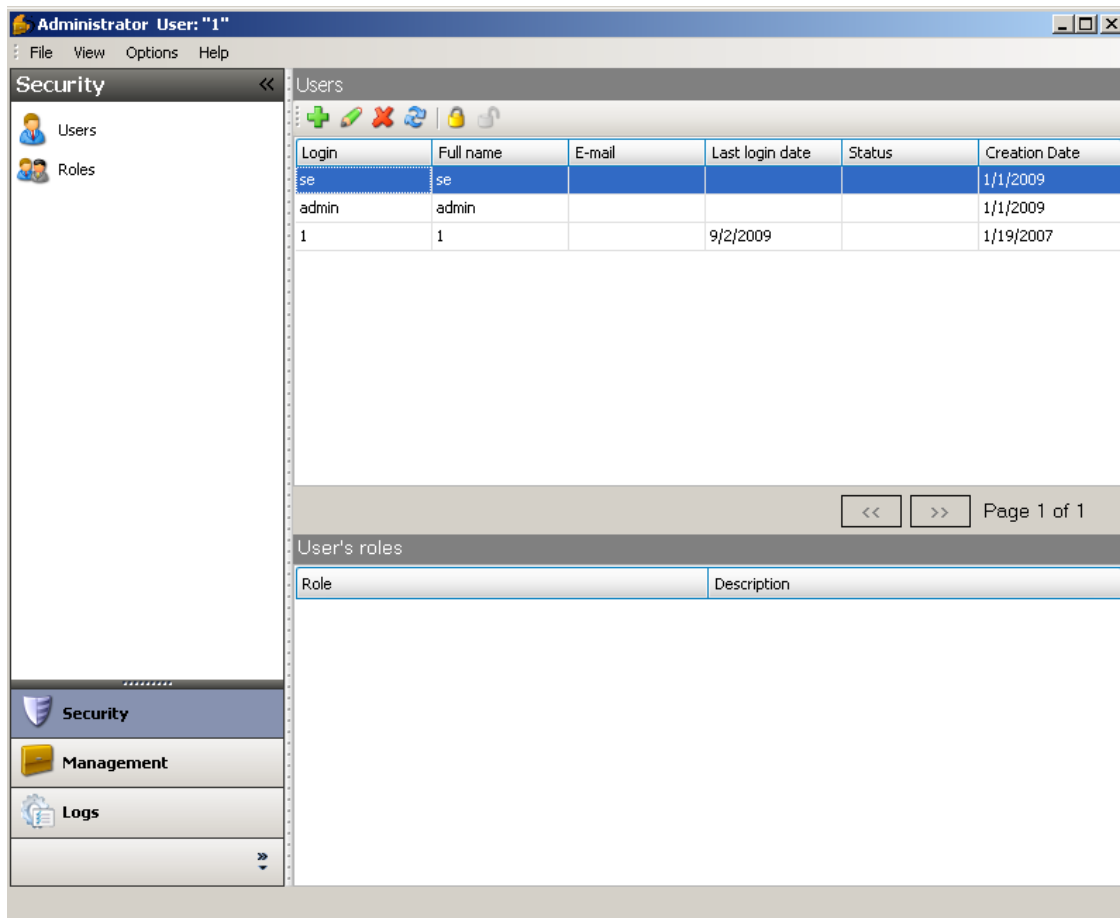


Figure 2-18: Scorto Administrator application

Logging on to the System is successfully performed.

3 SECURITY MANAGEMENT

This chapter provides instructions on how to manage security using the Scorto Administrator application.

Management of security in the Scorto Administrator application includes:

- Management of user accounts
- Management of roles

Overview

This chapter comprises the following sections:

Management of User Accounts, page 15, describes the procedures for managing user accounts.

Managing User Roles, page 29, describes the procedures for managing user roles.

Management of User Accounts

The Scorto Administrator application allows the system administrator to manage user accounts, namely:

- refresh the list of existing user accounts
- add new user accounts
- edit existing user accounts
- delete existing user accounts
- block and un-block existing user accounts.

The procedures for performing all these actions are described in the sections below.

Refreshing List of Existing User Accounts

To refresh the list of existing user accounts:

1. Log on to the Scorto Administrator application as described in Section *Logging on to the System*, page 12.

The working area of the application is described:

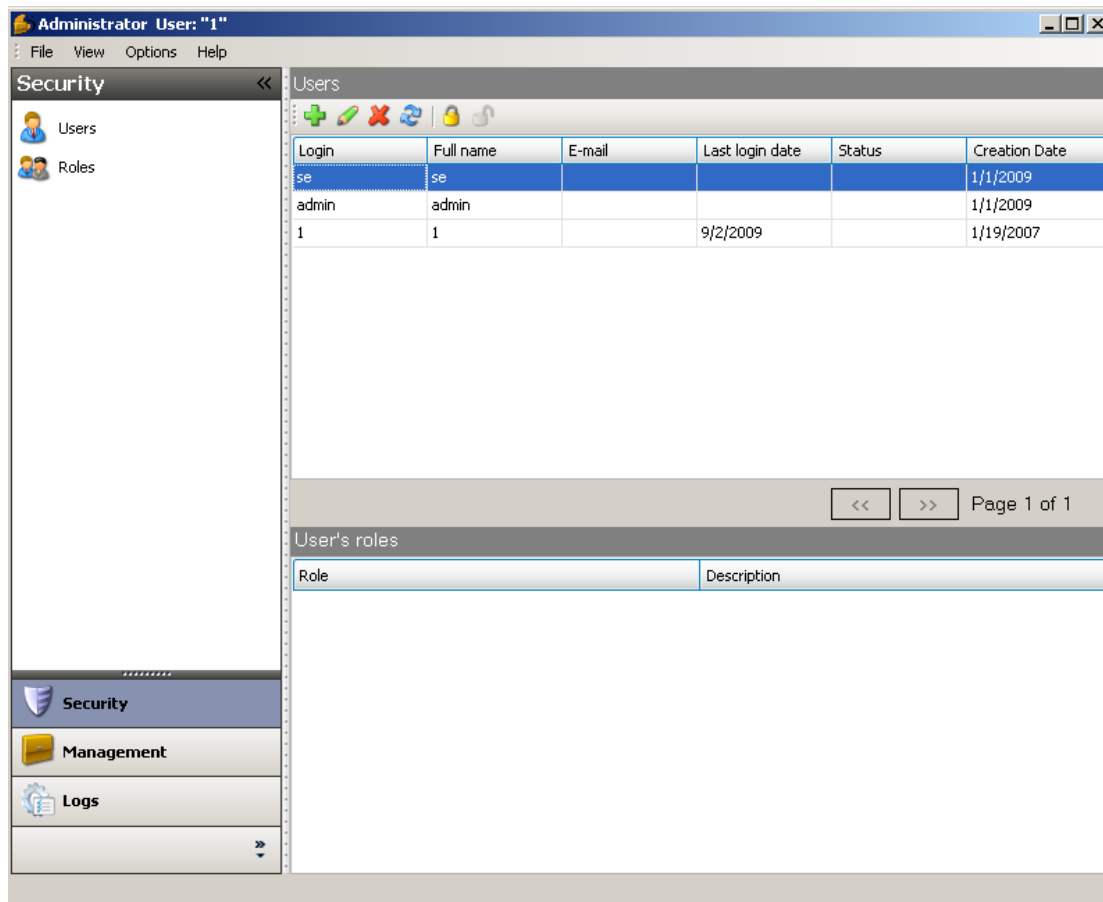



Figure 3-1: Application Scorto Administrator

2. On the toolbar of the **Users** working area, click .
- The list of user accounts is successfully refreshed.

Adding New User Accounts

This section describes how to add a new user account in the Scorto Administrator application.

To add a new user account:

1. Log on to the Scorto Administrator application as described in Section *Logging on to the System*, page 12.

The working area of the application is described:

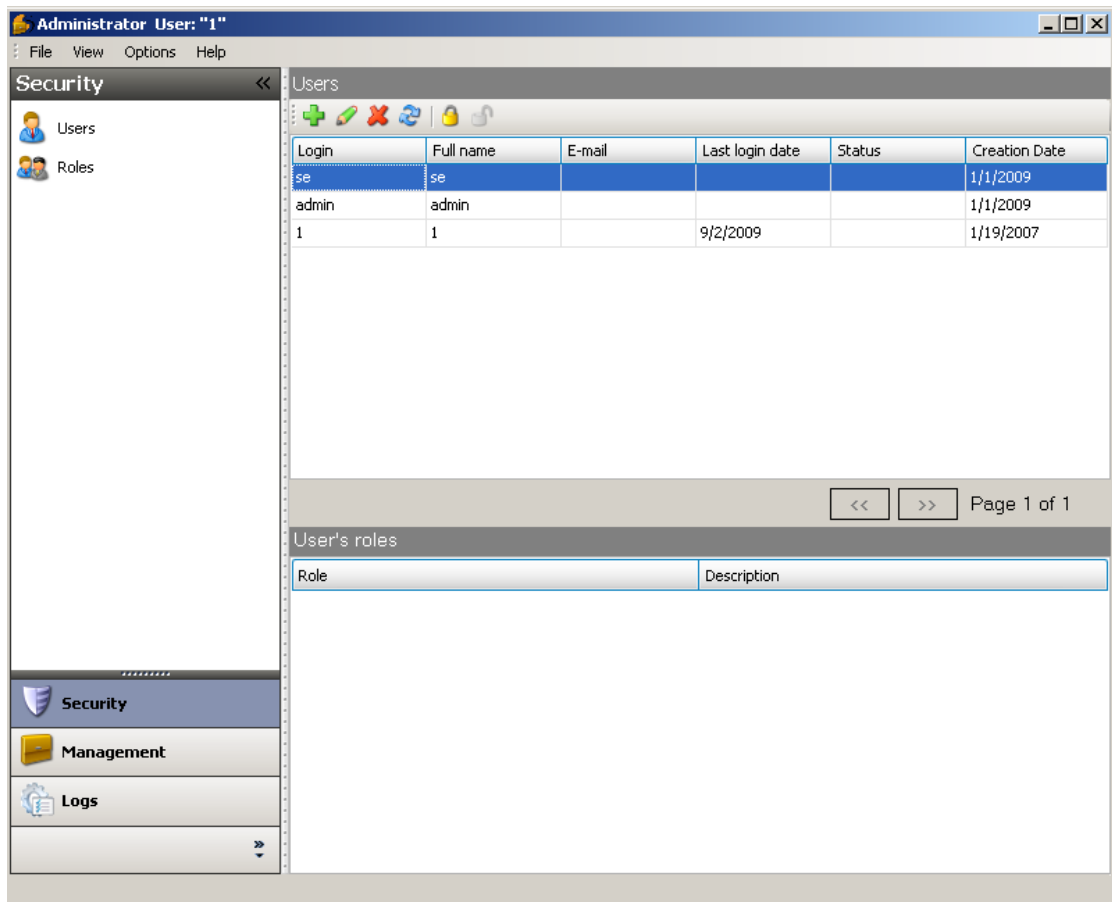


Figure 3-2: Application Scorto Administrator

Note: *If you are already logged on to the Scorto Administrator application, on the navigation bar select the **Security** tab and select **Users**.*

2. On the toolbar of the **Users** working area, click .

The *Add user* dialog box is displayed:

The screenshot shows the 'Add user' dialog box. It features a title bar with the text 'Add user' and a close button. The main area contains several input fields: 'Login', 'Full name', 'E-mail', 'Password', 'Confirm password', and 'Password validity period'. Each of the first five fields has a red asterisk to its right, indicating they are mandatory. Below these fields is a 'Certificate Thumbprint' section with an empty text box and 'Add' and 'Remove' buttons. There are two checkboxes: 'The user must change the password at next login' and 'User cannot change password'. At the bottom is a 'Roles' section with buttons 'Choose all', 'Invert', and 'Cancel'. Below these buttons is a list of roles: Admin, SuperUser, Nova, Inspector, CreditAnalyst, Maven, Patron, and Auditor. Each role has a checkbox to its left. At the very bottom are 'OK' and 'Cancel' buttons.

Figure 3-3: *Add user* dialog box

3. In the **Login** box, enter the username that will be used to log on to the system. Usernames can contain only Latin letters, numbers and the underline symbol. Filling this box is mandatory.
4. In the **Full name** box, enter the user's full name. Filling this box is mandatory.
5. If necessary, in the **E-mail** box, enter the user's email address.
6. In the **Password** box, enter the password that will be used to log on to the system. Filling this box is mandatory.
7. In the **Confirm password** box, re-enter the password. Filling this box is mandatory.

8. In the **Password validity period** box, enter the period during which the password will remain valid.
9. If necessary, turn on/off the user certificate checking mode (to add a certificate, click **Add** and to remove a certificate, click **Remove**).
10. If necessary, set limitations for the procedure of changing the password, using
 - ☒ The user must change the password at next login and
 - ☒ User cannot change password .
11. If necessary, in the **Roles** area, select a role for the user.

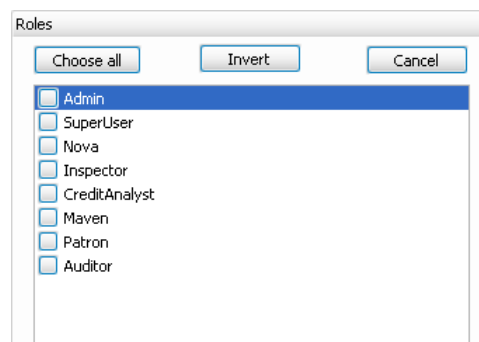


Figure 3-4: Selecting user roles

To select several or all roles, use the **Choose all** or **Invert** buttons.

12. Click **OK**.

The new user account is successfully registered in the system.

Editing User Accounts

This section describes how to edit an existing user account in the Scorto Administrator application.

To edit a user account:

1. Log on to the Scorto Administrator application as described in Section *Logging on to the System*, page 12.

The working area of the application is described:

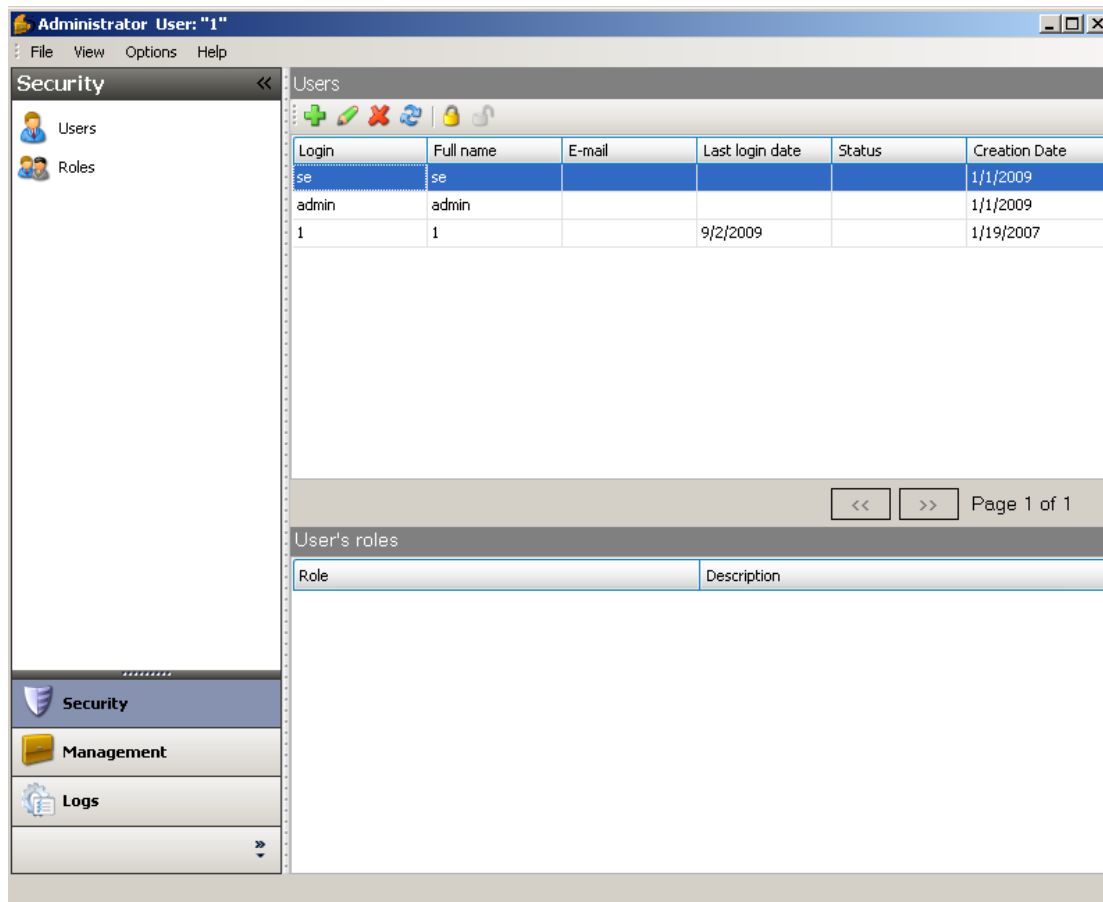



Figure 3-5: Application Scorto Administrator

Note: *If you are already logged on to the Scorto Administrator application, on the navigation bar select the **Security** tab and select **Users**.*

2. In the table of user accounts, select the user account that needs editing.
3. On the toolbar of the **Users** working area, click .

The *Edit user* dialog box is displayed:

The *Edit user* dialog box is shown. It includes fields for Login, Full name, E-mail, Password, Confirm password, and Password validity period. There are also checkboxes for password requirements and a Roles section with a list of roles (Admin, SuperUser, Nova, Inspector, CreditAnalyst, Maven, Patron, Auditor) and buttons for 'Choose all', 'Invert', and 'Cancel'.

Figure 3-6: *Edit User* dialog box

4. Enter required changes (applicable values are described in Steps 3-11 of the procedure specified in Section *Adding New User Accounts*, page 16).
5. Click **OK**.

The user account is successfully edited.

Deleting User Accounts

This section describes how to delete an existing user account in the Scorto Administrator application.

To delete a user account:

1. Log on to the Scorto Administrator application as described in Section *Logging on to the System*, page 12.

The working area of the application is described:

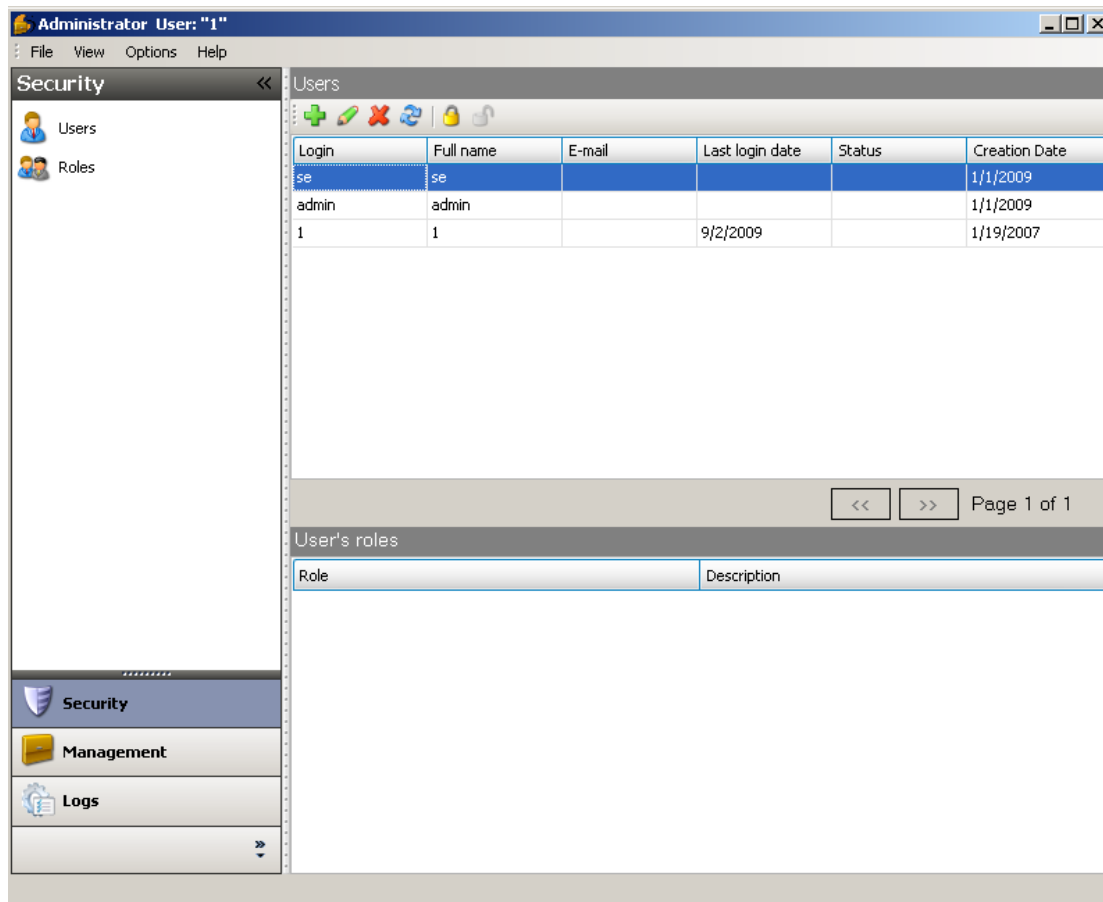



Figure 3-7: Application Scorto Administrator

Note: *If you are already logged on to the Scorto Administrator application, on the navigation bar select the **Security** tab and select **Users**.*

2. In the table of user accounts, select the user account that needs deleting.
3. On the toolbar of the **Users** working area, click .

Before the selected user account is deleted, the following confirmation request is displayed:

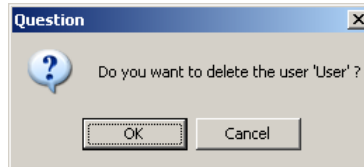


Figure 3-8: Confirmation request

4. Click **OK**.

The selected user account is assigned the *Deleted* status:

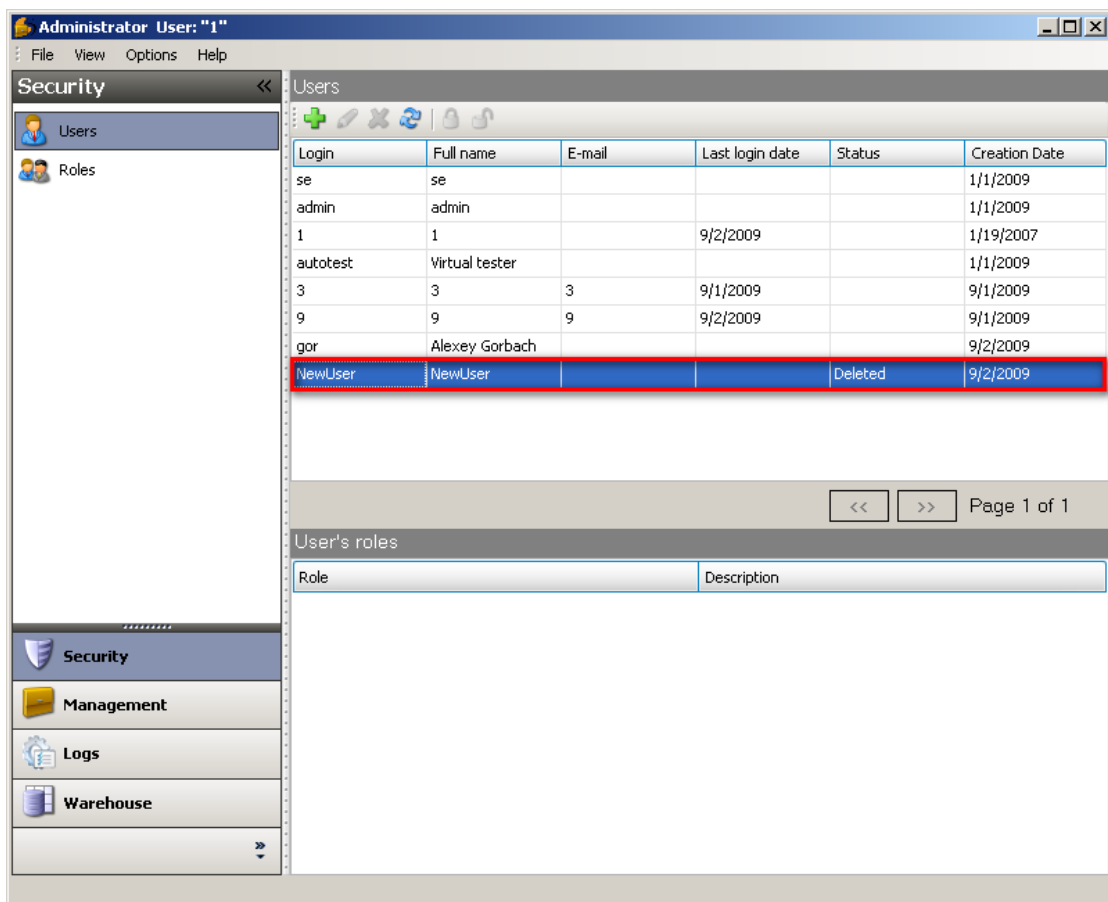


Figure 3-9: User account with the Deleted status

Blocking and Un-Blocking User Accounts

This section describes how to block/un-block an existing user account in the Scorto Administrator application.

Blocking User Accounts

To block a user account:

1. Log on to the Scorto Administrator application as described in Section *Logging on to the System*, page 12.

The working area of the application is described:

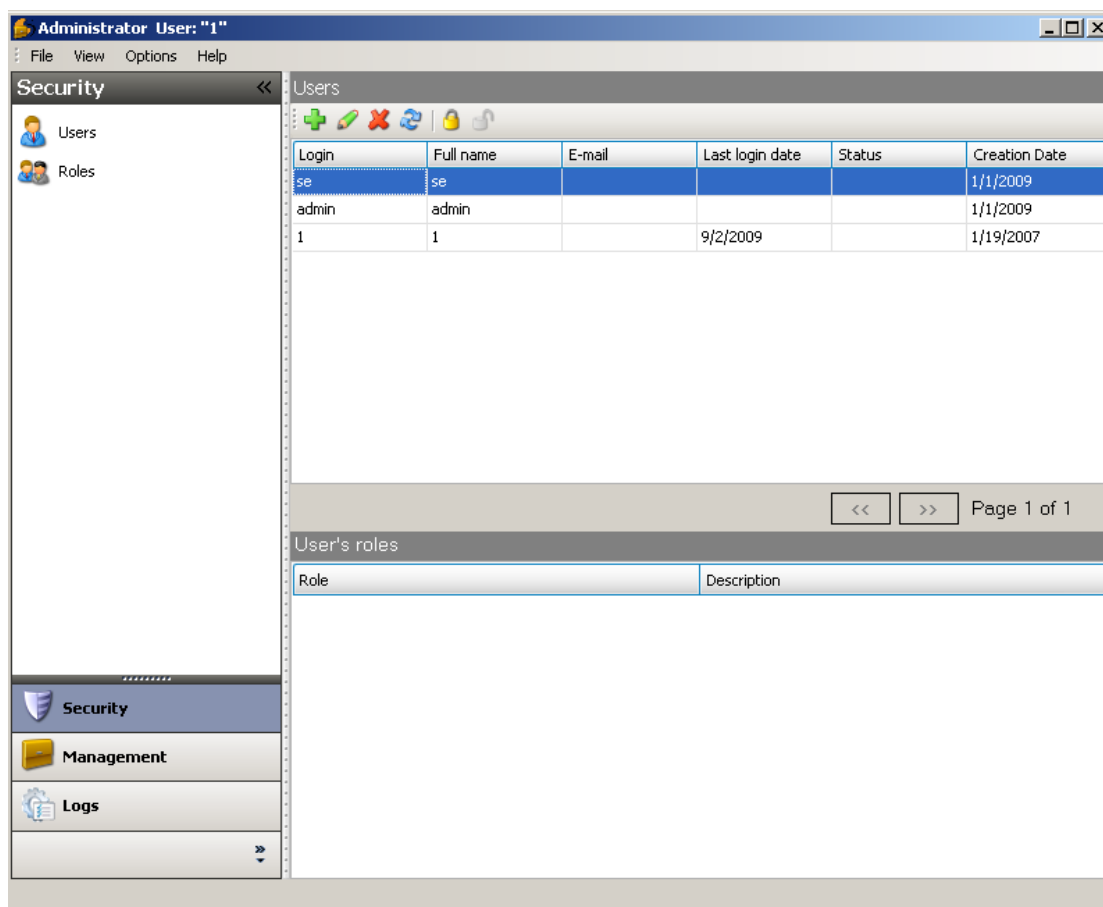



Figure 3-10: Application Scorto Administrator

Note:

*If you are already logged on to the Scorto Administrator application, on the navigation bar select the **Security** tab and select **Users**.*

2. In the table of user accounts, select the user account that needs blocking.
3. On the toolbar of the **Users** working area, click .

The confirmation that the user account is blocked is displayed:

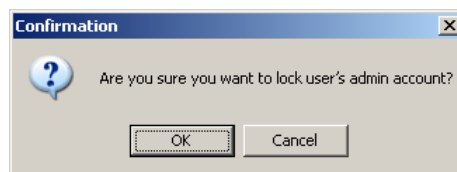


Figure 3-11: User account blocked confirmation

4. Click **OK**.

The message informing the user on the successful blocking of the user account is displayed:

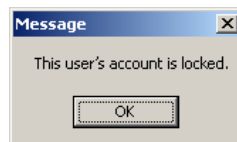


Figure 3-12: Message about successful blocking

5. Click **OK**.

The user account is successfully blocked.

The Locked status of the blocked user account is displayed:

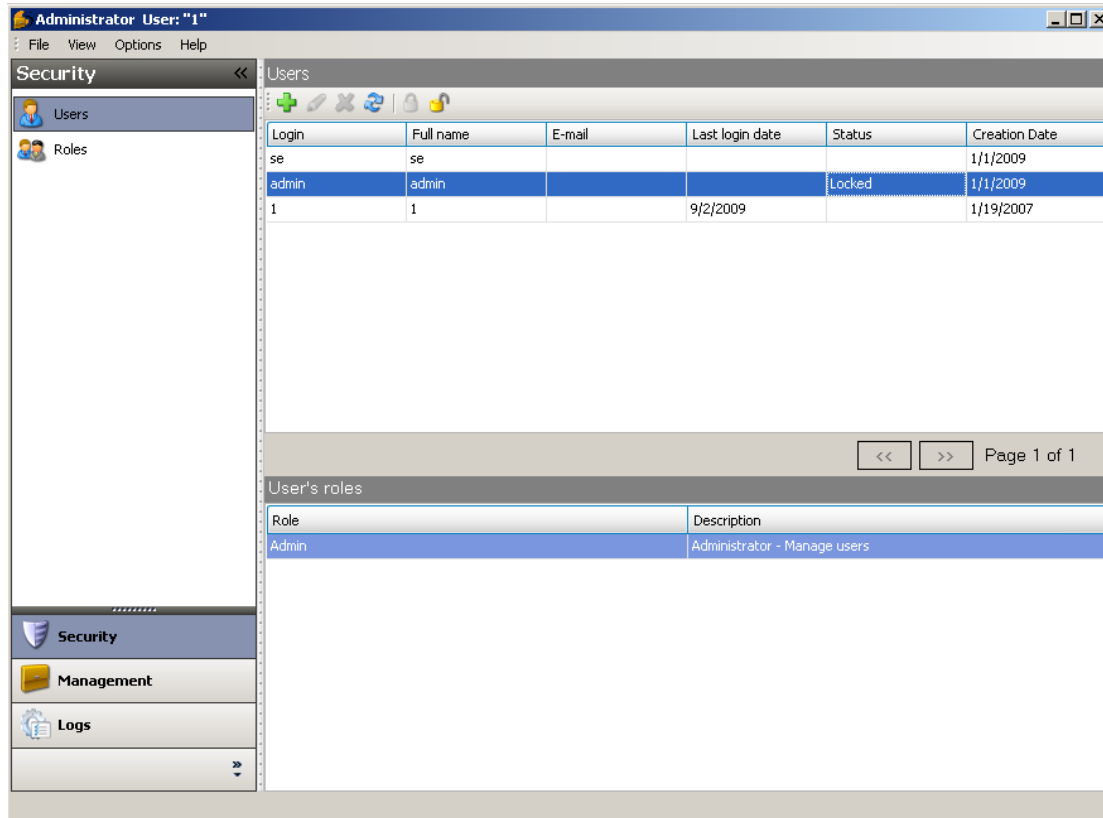


Figure 3-13: Blocked user account (highlighted)

Unblocking User Accounts

To unblock a user account:

1. Log on to the Scorto Administrator application as described in Section *Logging on to the System*, page 12.

The working area of the application is described:

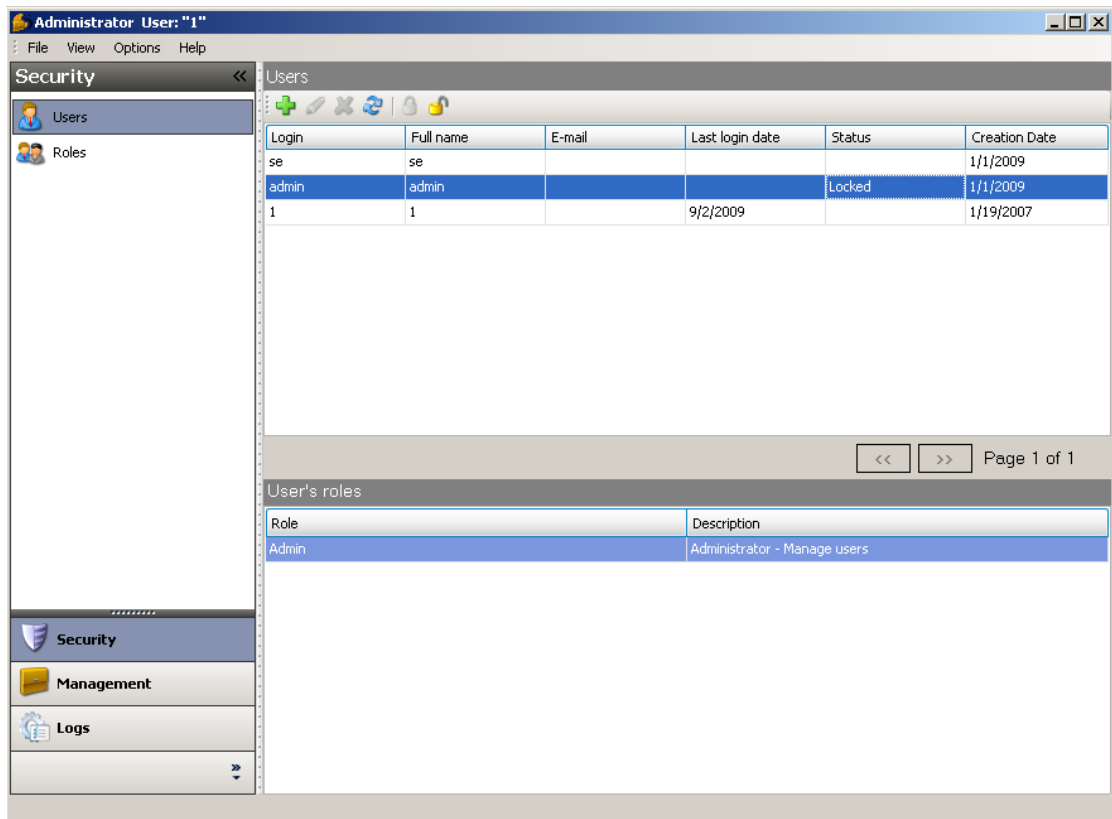



Figure 3-14: Application Scorto Administrator

Note:

*If you are already logged on to the Scorto Administrator application, on the navigation bar select the **Security** tab and select **Users**.*

2. In the table of user accounts, select the user account that needs unblocking.
3. On the toolbar of the **Users** working area, click .

The confirmation that the user account is unblocked is displayed:

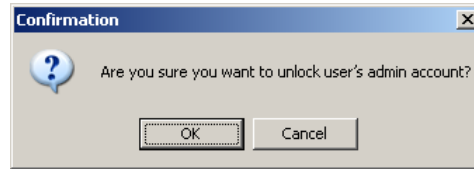


Figure 3-15: User account unblocked confirmation

6. Click **OK**.

The message informing the user on the successful unblocking of the user account is displayed:

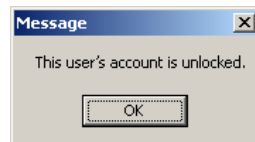


Figure 3-16: Message about successful unblocking

7. Click **OK**.

The user account is successfully unblocked.

The changed status of the unblocked user account is displayed:

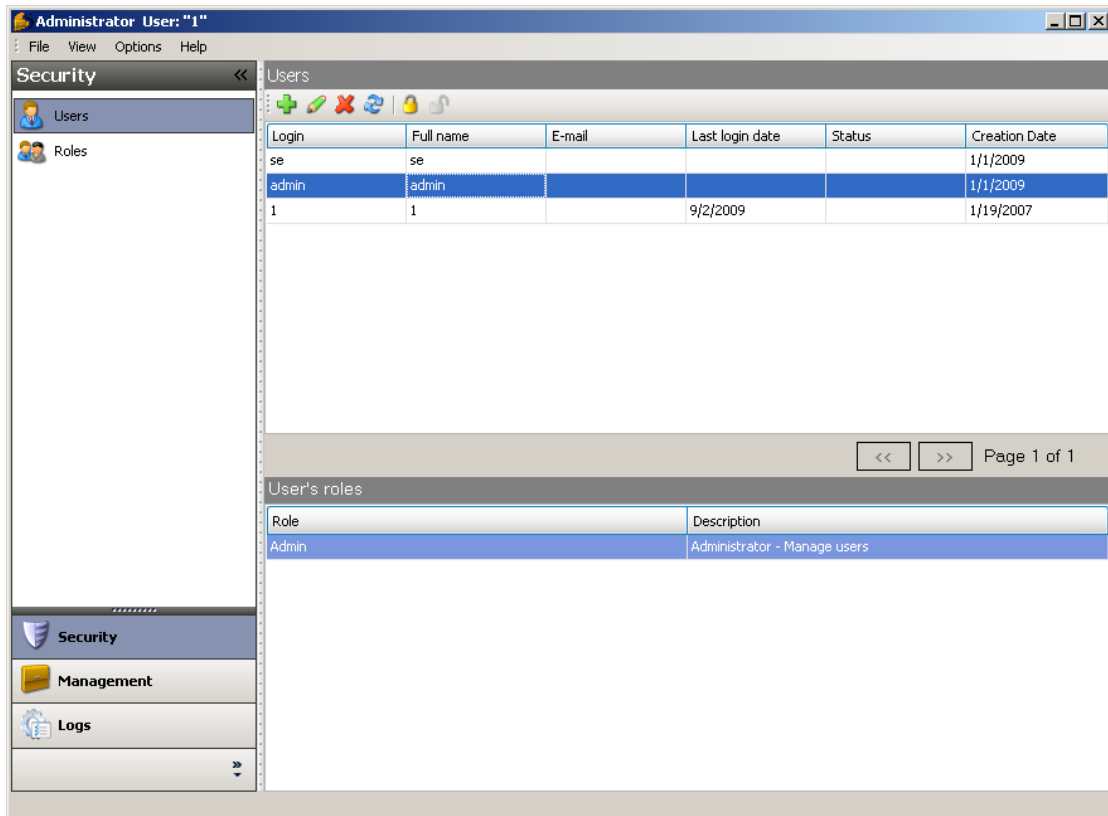


Figure 3-17: Unblocked user account (highlighted)

Managing User Roles

The Scorto Administrator application allows the system administrator to manage user roles, namely:

- refresh the list of existing user roles
- edit existing user roles

The procedures for performing all these actions are described in the sections below.

List of User Roles Available by Default in Scorto System

№	Role Name	Role Description	Comment
1	Admin	System administrator	The role is intended for the Scorto Administrator application and allows the user to perform all the actions available in the Scorto Administrator application.
2	Maven	Administrator of the Maven application	The role is intended for the Scorto Maven application and allows the user to perform all the actions available in the Scorto Maven application.
3	Patron	Administrator of the Patron application	The role is intended for the Scorto Patron application and allows the user to perform all the actions available in the Scorto Patron application.
4	Inspector	SSS 3.03. Inspector web-application	The Scorto Inspector Web application is an additional tool for testing strategy elements developed in the Scorto Maven application.
5	RiskAnalyst	SSS 3.03 Risk Analyst Web application	The role is intended for the Scorto Risk Analyst Web application and allows the user to perform all the actions available in the Scorto Risk Analyst Web application.

Refreshing List of Existing Roles

To refresh the list of existing user roles:

1. Log on to the Scorto Administrator application as described in Section *Logging on to the System*, page 12.

The working area of the application is described:

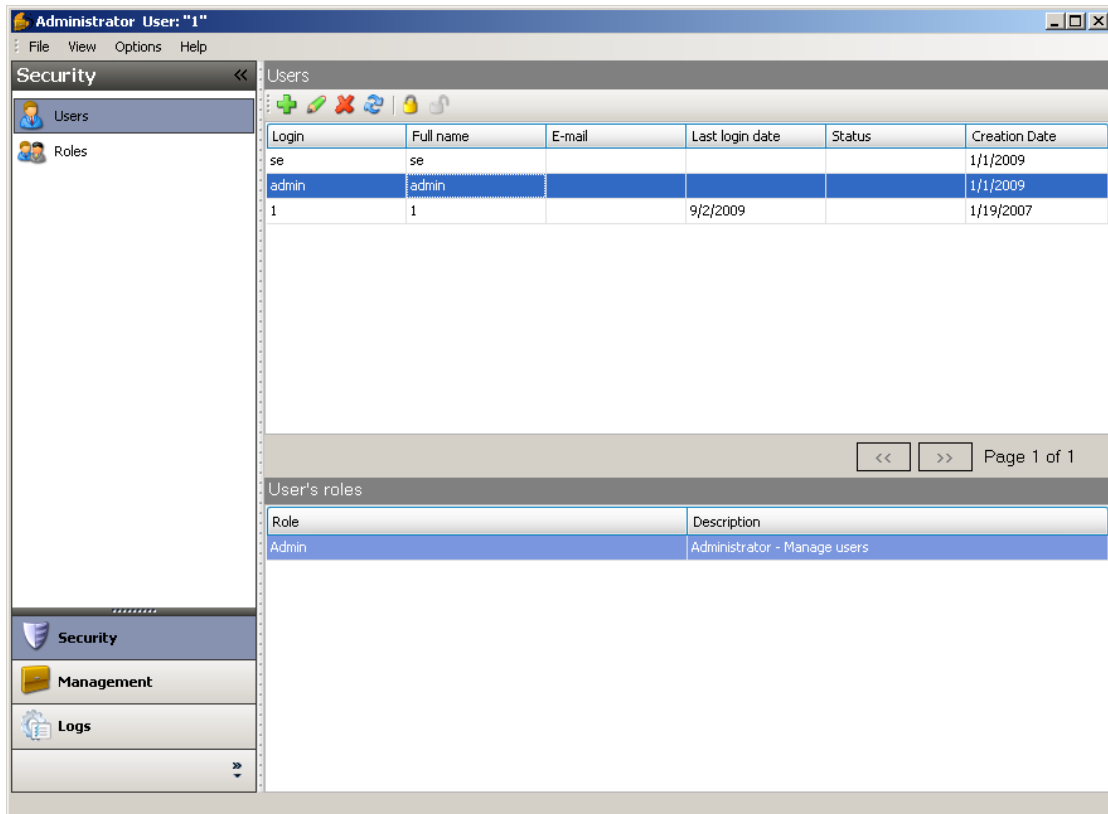


Figure 3-18: Application Scorto Administrator

2. In the navigation area, select **Roles**.

The **Roles** working area is displayed:

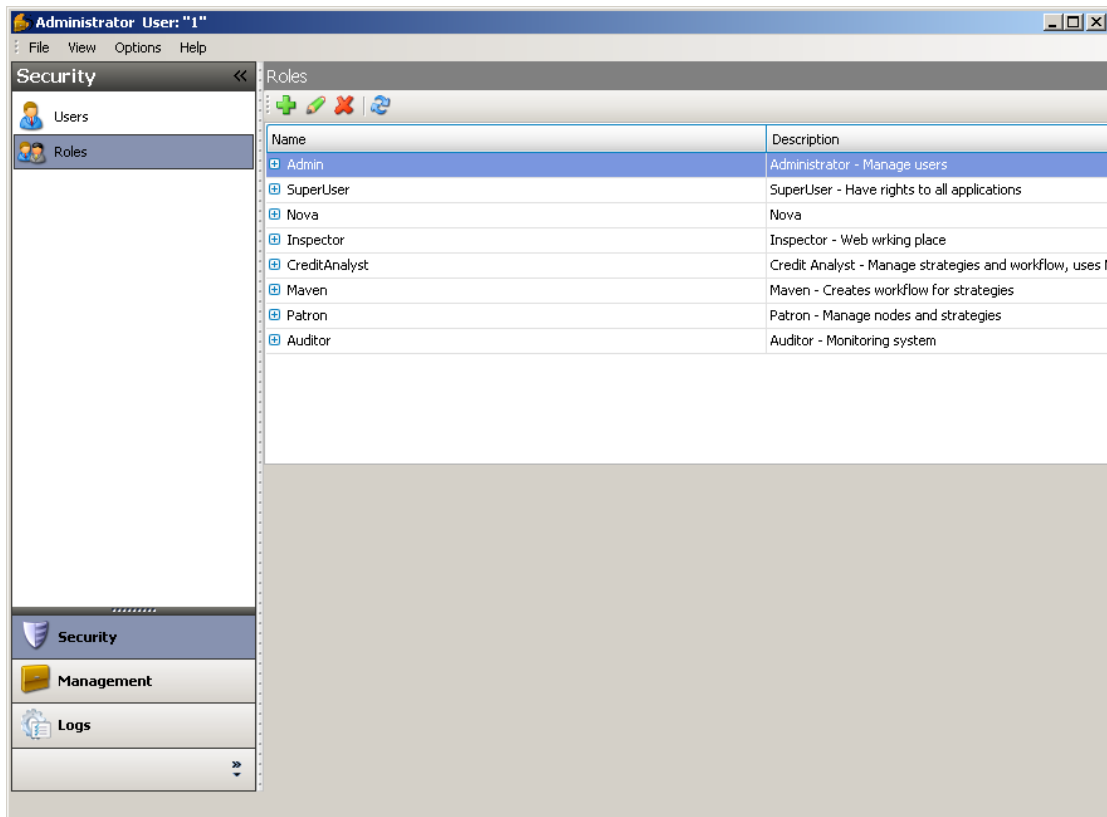



Figure 3-19: Roles working area

3. On the toolbar of the **Roles** working area, click .
The list of user roles is successfully refreshed.

Editing User Roles

This section describes how to edit an existing user role in the Scorto Administrator application.

To edit an existing user role:

1. Log on to the Scorto Administrator application as described in Section *Logging on to the System*, page 12.

The working area of the application is described:

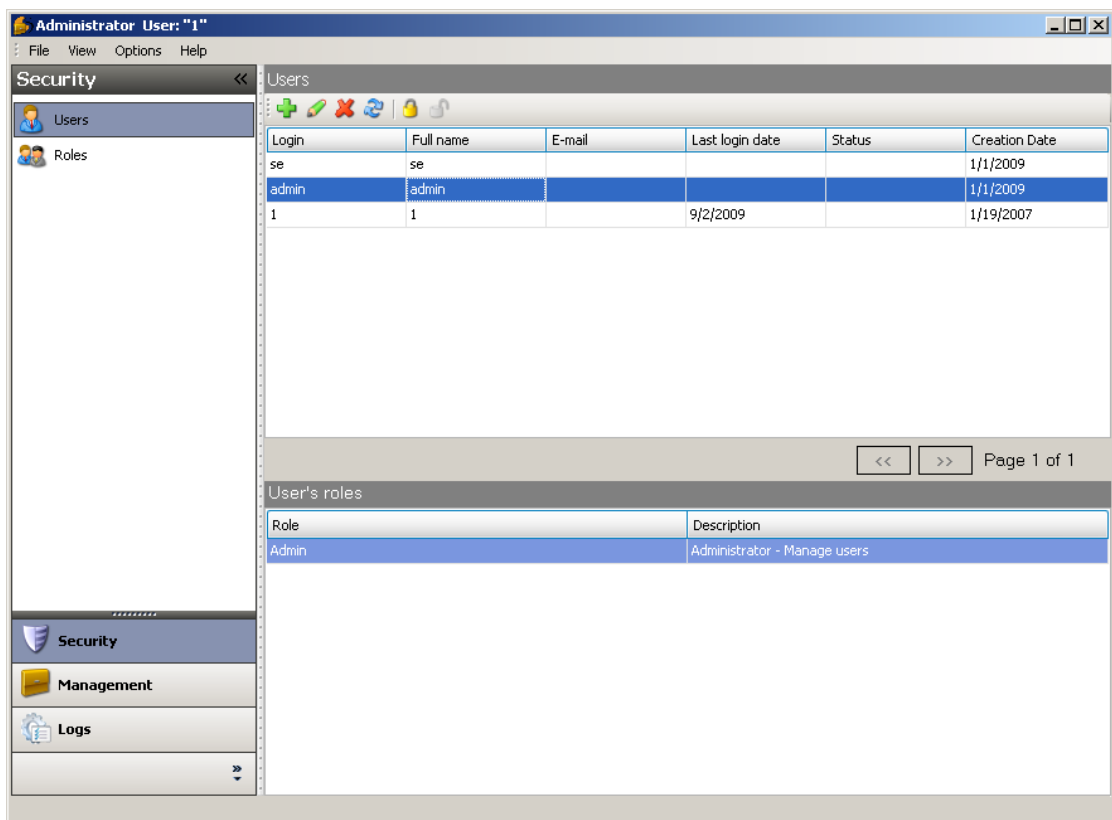


Figure 3-20: Application Scorto Administrator

2. In the navigation area, select **Roles**.

Note:

*If you are already logged on to the Scorto Administrator application, on the navigation bar select the **Security** tab and select **Roles**.*

The **Roles** working area is displayed:

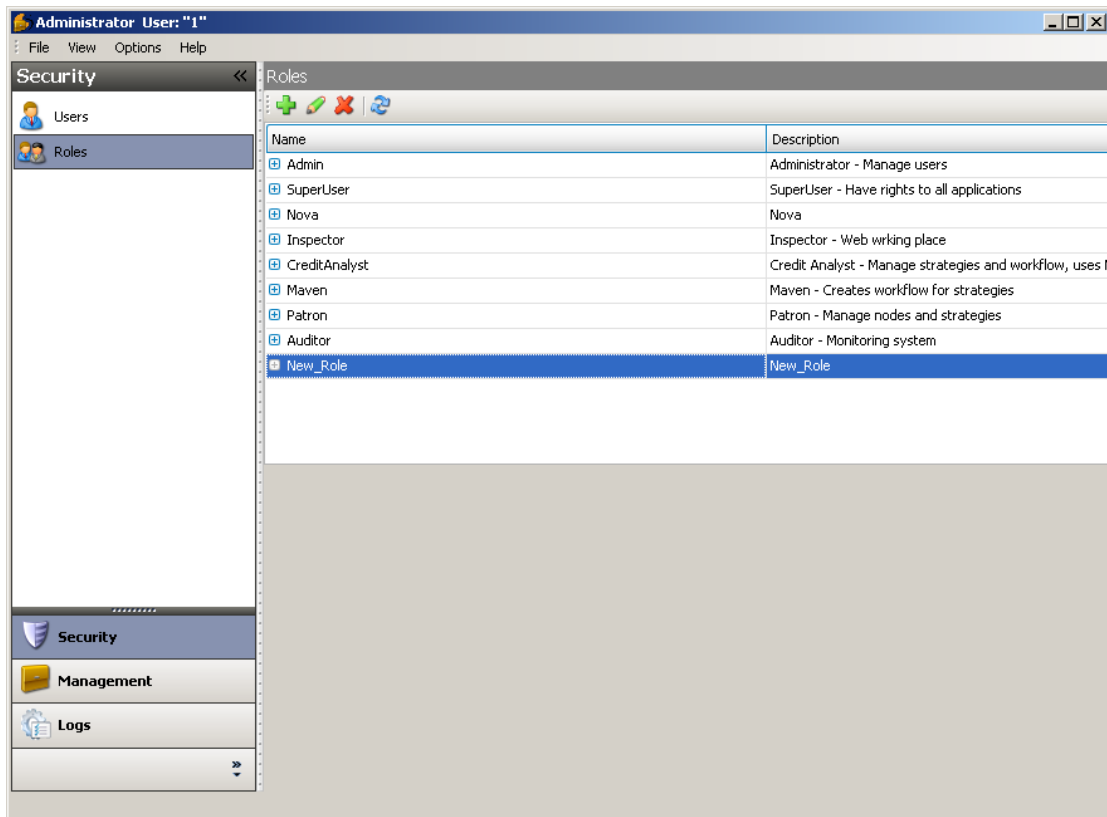



Figure 3-21: Roles working area

3. In the table in the **Roles** working area, select the role that needs editing.
4. On the toolbar of the **Roles** working area, click .

The *Edit role* dialog box is displayed:

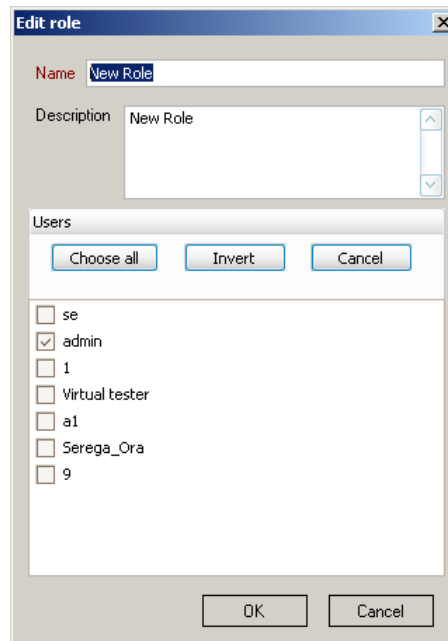


Figure 3-22: *Edit Role* dialog box

5. Make the required changes (for information on how to fill in boxes in the *Edit Role* dialog box, see Steps 4-9 of the previous procedure).
6. Click **OK**.

The selected role is successfully edited.

4 SYSTEM MANAGEMENT

This chapter provides instructions on how to manage the system using the Scorto Administrator application.

Overview

This chapter comprises the following sections:

Managing User Sessions, page 37, describes the procedures for managing user sessions.

Working With Locked Strategies, page 42, describes the procedures for viewing and unblocking blocked sessions.

Scheduling Behavioral Strategies Start, page 45, describes the procedures for scheduling the start of behavioral strategies.

Viewing System Log, page 59, describes the procedures for viewing the system log.

Managing User Sessions

The Scorto Administrator application allows the user with the System Administrator role to view and delete current sessions.

Viewing Active Sessions

To view the list of active sessions:

1. Log on to the Scorto Administrator application as described in Section *Logging on to the System*, page 12.

The working area of the application is displayed:

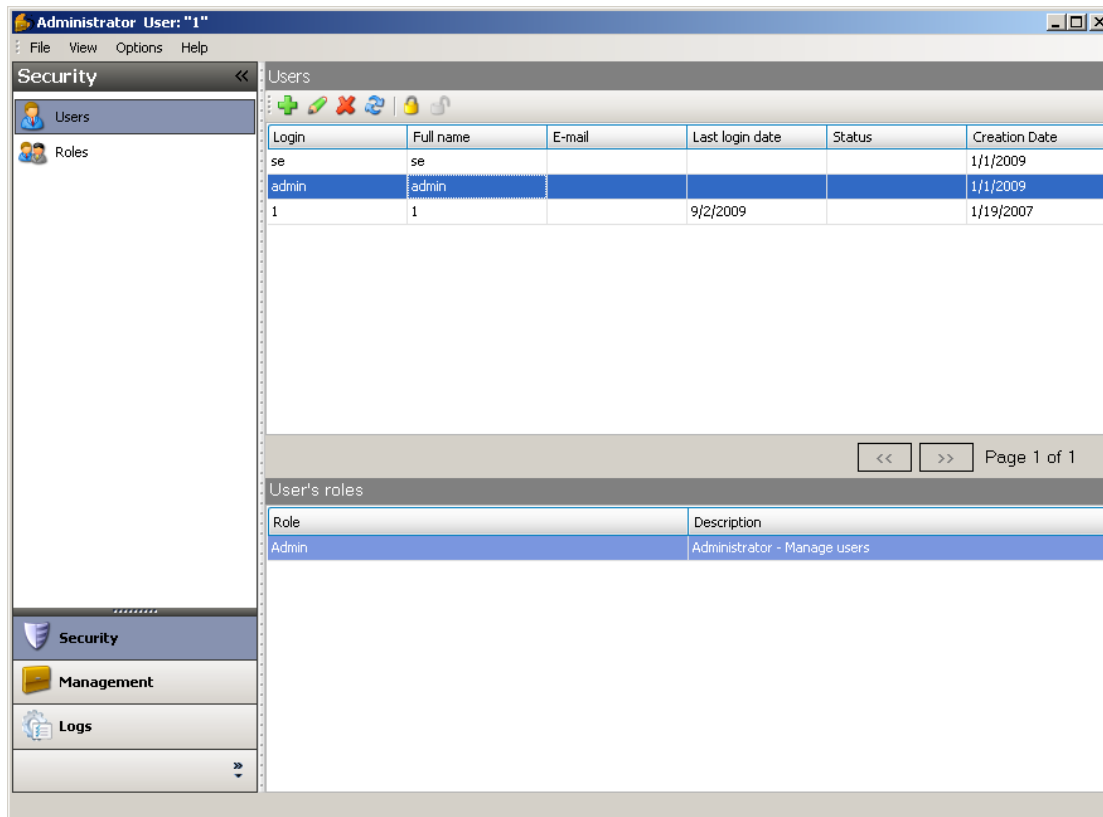


Figure 4-1: Application Scorto Administrator

2. Select the **Management** tab.

The **Sessions** working area is displayed by default:

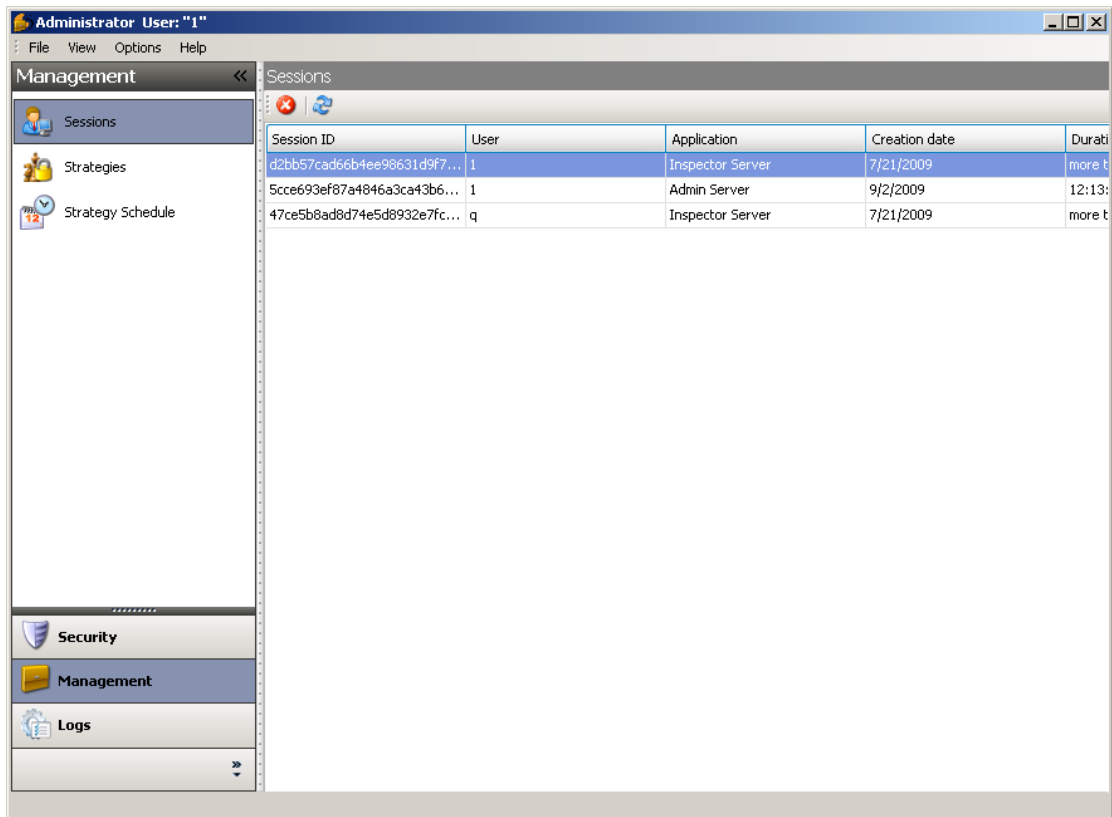



Figure 4-2: Sessions working area

3. To refresh the list of sessions, click .

The table of the **Sessions** working area lists the information on all active user sessions in the system.

Deleting Sessions

To delete a session:

1. Log on to the Scorto Administrator application as described in Section *Logging on to the System*, page 12.

The working area of the application is displayed:

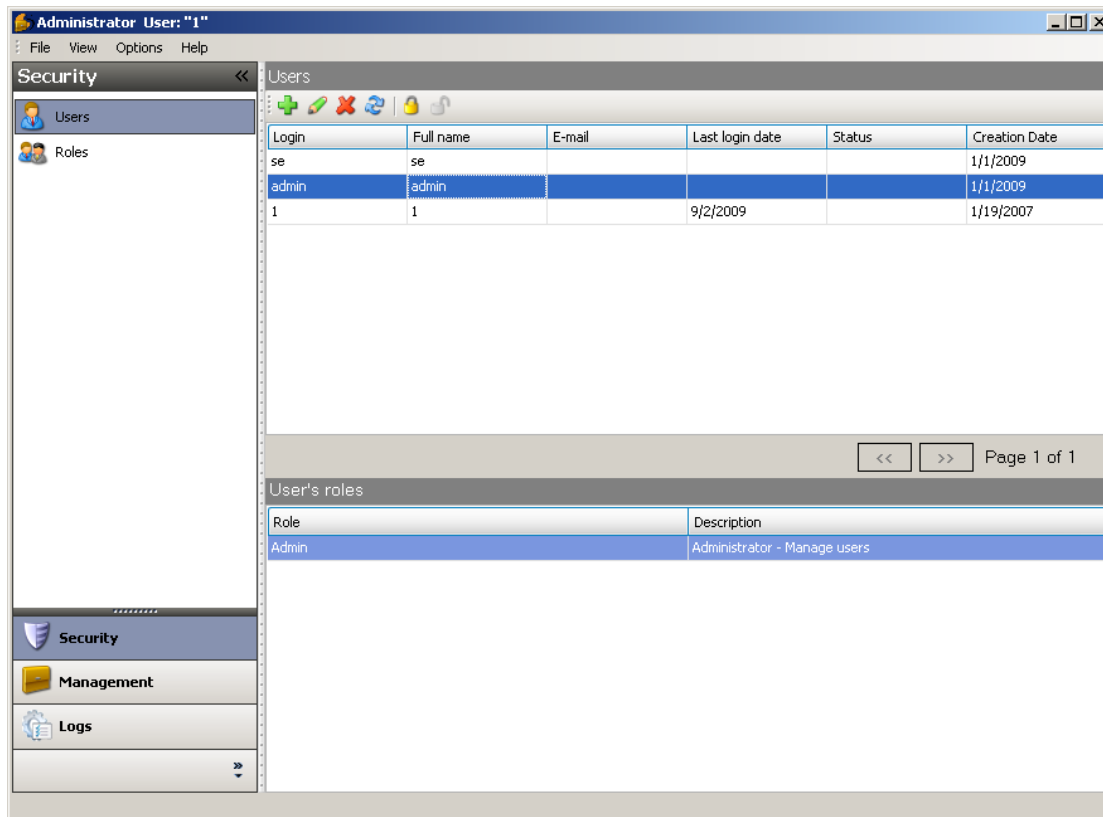


Figure 4-3: Application Scorto Administrator

2. Select the **Management** tab.

The **Sessions** working area is displayed by default:

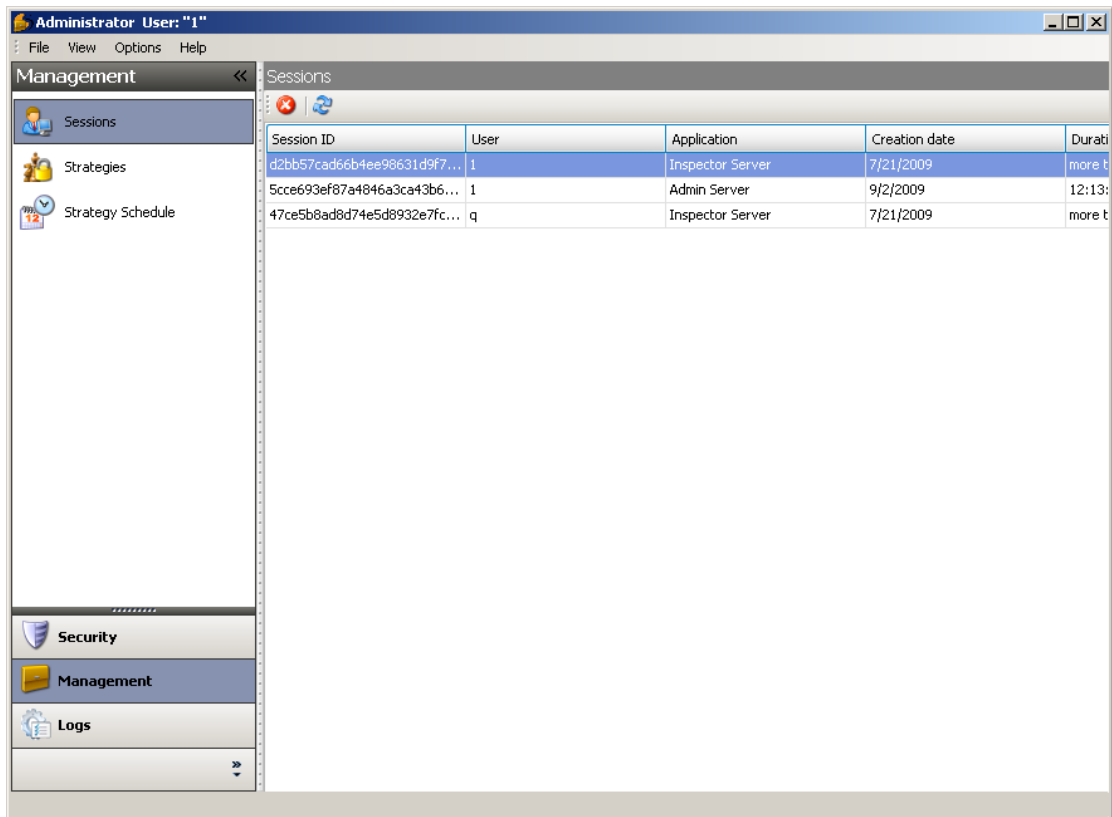



Figure 4-4: Sessions working area

3. In the table in the **Roles** working area, select the role that needs deleting.
4. On the toolbar of the **Sessions** working area, click .

The following confirmation is displayed to delete the select session:

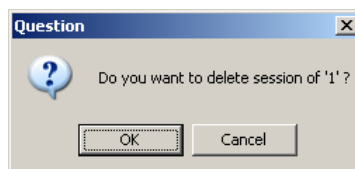


Figure 4-5: Session deletion confirmation

5. Click **OK**.

The selected session is successfully deleted.

Working With Locked Strategies

The Scorto Administrator application allows the user with the System Administrator role to view and unlock locked strategies.

To view and unlock locked strategies:

1. Log on to the Scorto Administrator application as described in Section *Logging on to the System*, page 12.

The working area of the application is displayed:

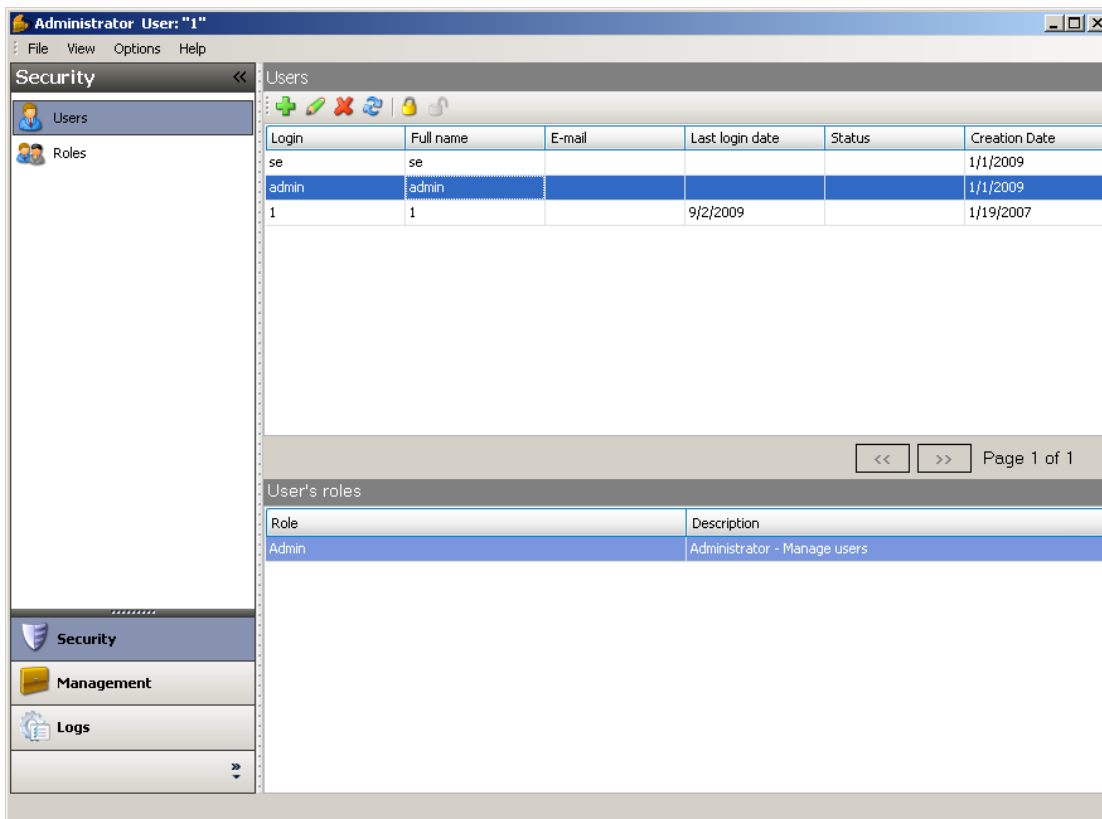


Figure 4-6: Application Scorto Administrator

2. Select the **Management** tab.

The **Sessions** working area is displayed by default:

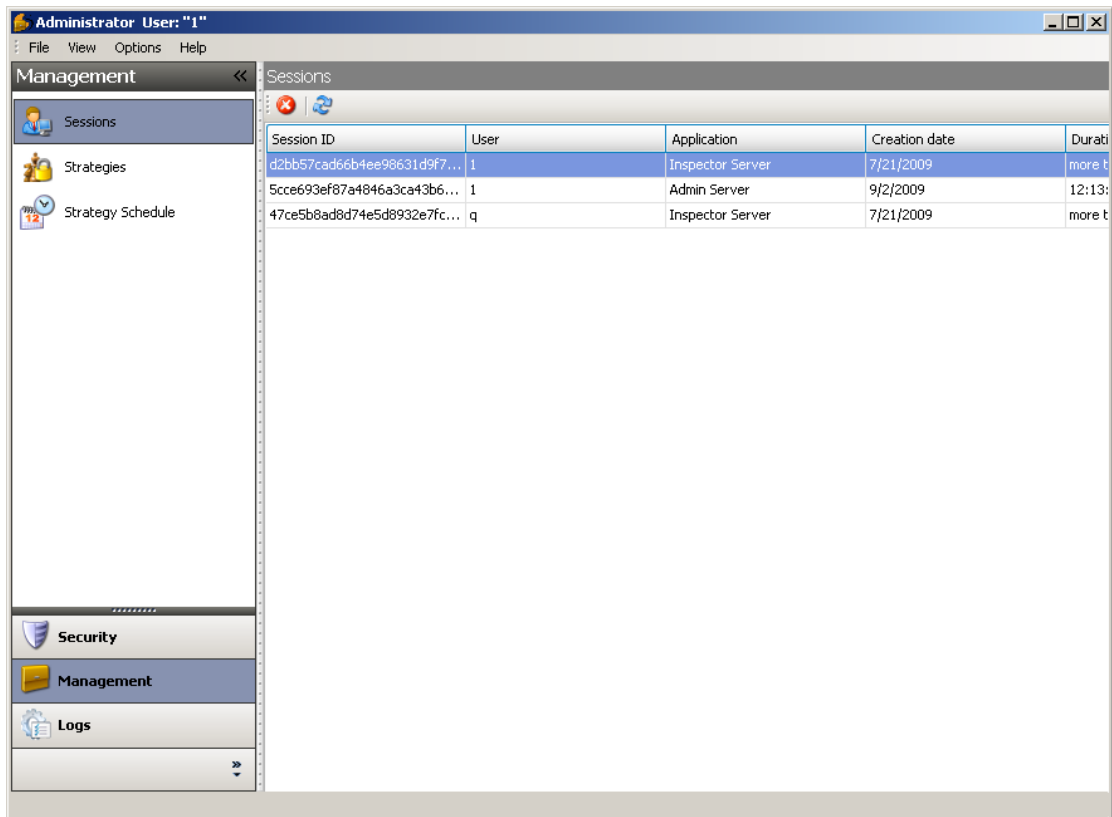


Figure 4-7: Sessions working area

3. In the navigation area, select **Strategies**.

The **Strategies** working area is displayed:

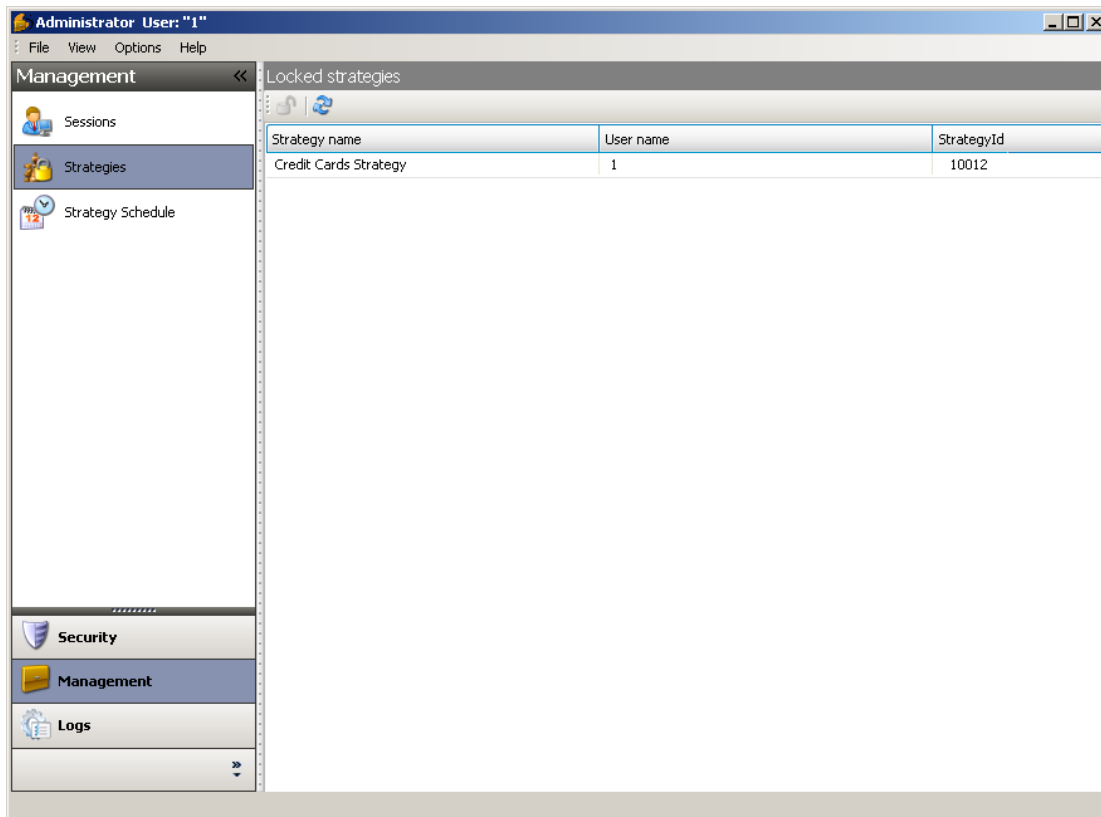




Figure 4-8: Locked Strategies working area

4. To refresh the list of locked strategies, click .
5. To unlock a strategy, select a locked strategy and click .

The selected strategy is successfully unlocked and removed from the table of locked strategies:

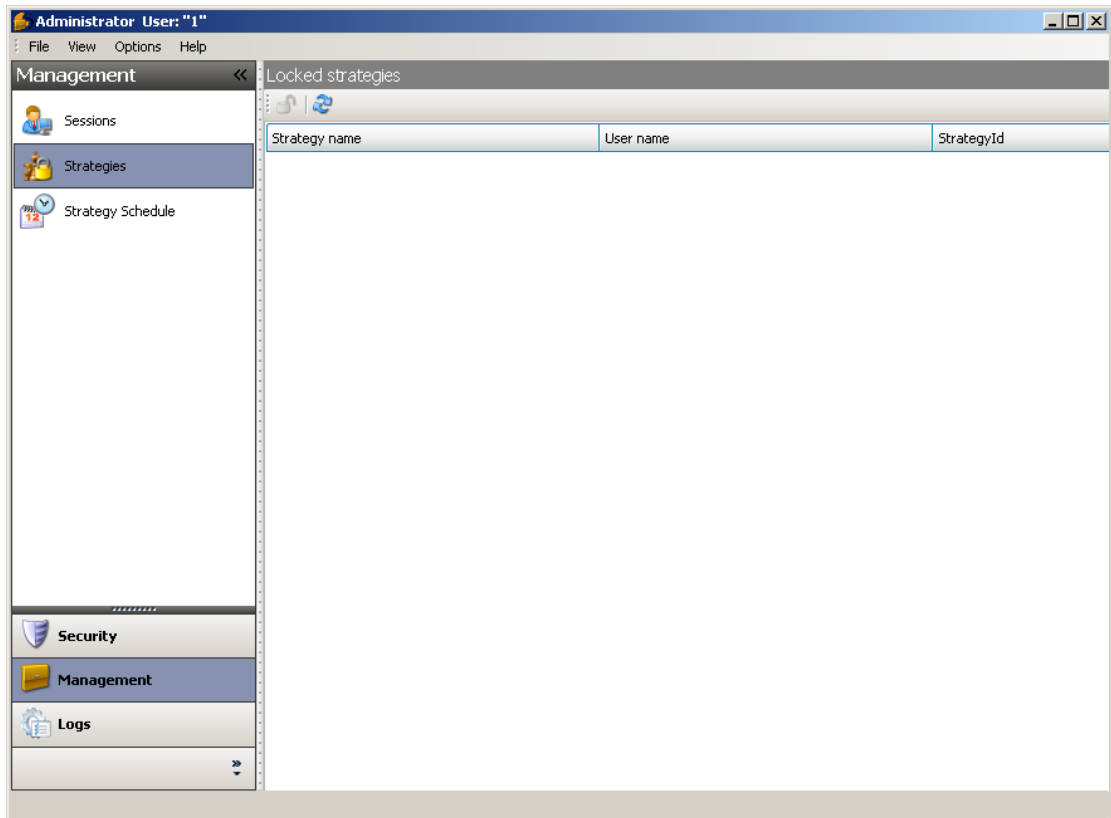


Figure 4-9: The selected strategy is successfully unlocked and removed from the table of locked strategies

Scheduling Behavioral Strategies Start

The Scortto Administrator application allows the user with the System Administrator role to schedule the start of behavioral strategies:

- view schedules and refresh the list of schedules;
- add new schedules;
- view the parameters of existing schedules;
- edit existing schedules;

- delete existing schedules.

Creating a New Schedule

This section describes the procedure for creating a new schedule in the Scorto Administrator application.

To create a new schedule:

1. Log on to the Scorto Administrator application as described in Section *Logging on to the System*, page 12.

The working area of the application is displayed:

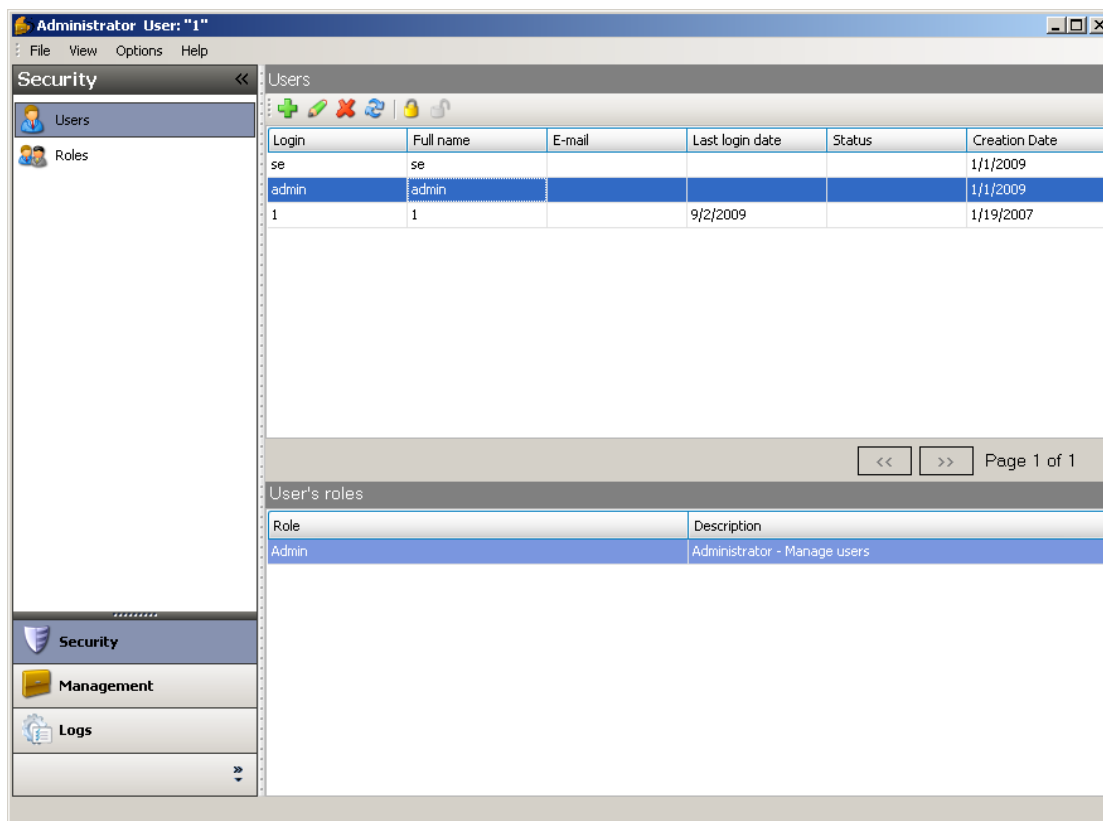


Figure 4-10: Application Scorto Administrator

2. Select the **Management** tab.

The **Sessions** working area is displayed by default:

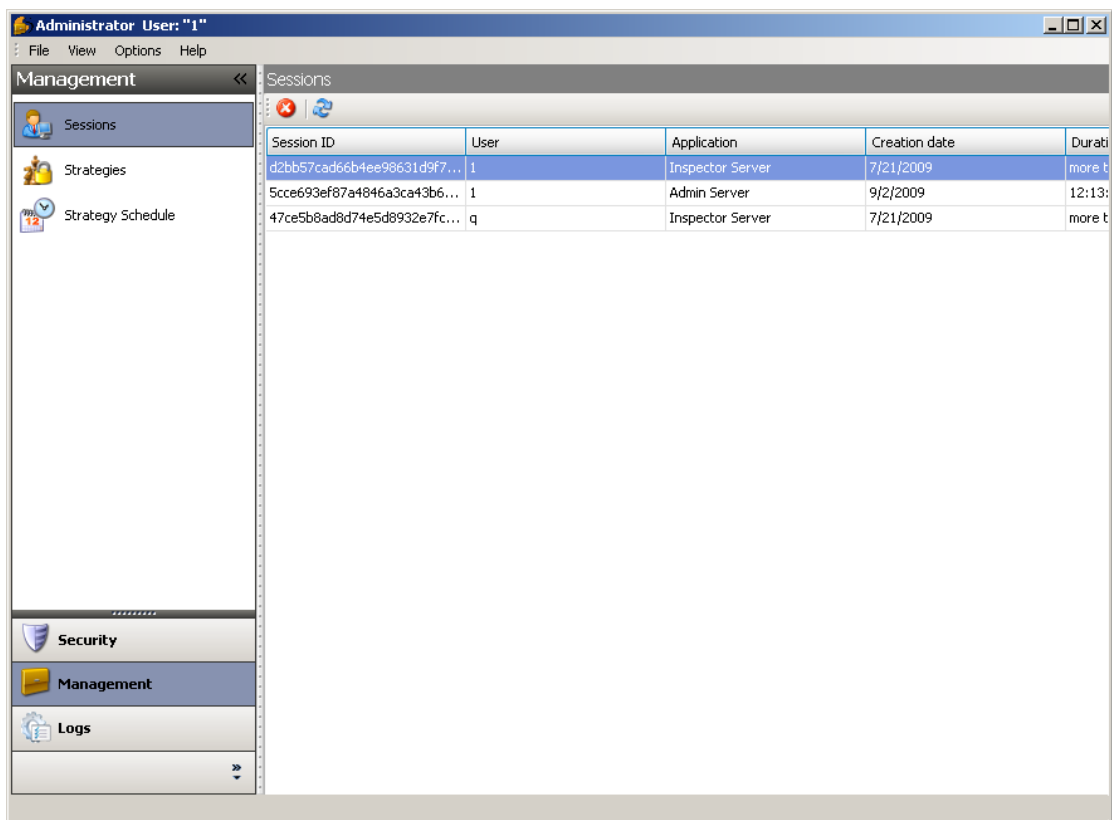


Figure 4-11: Sessions working area

3. In the navigation area, select **Strategy Run Schedule**.

The **Strategy Run Schedule** working area is displayed:

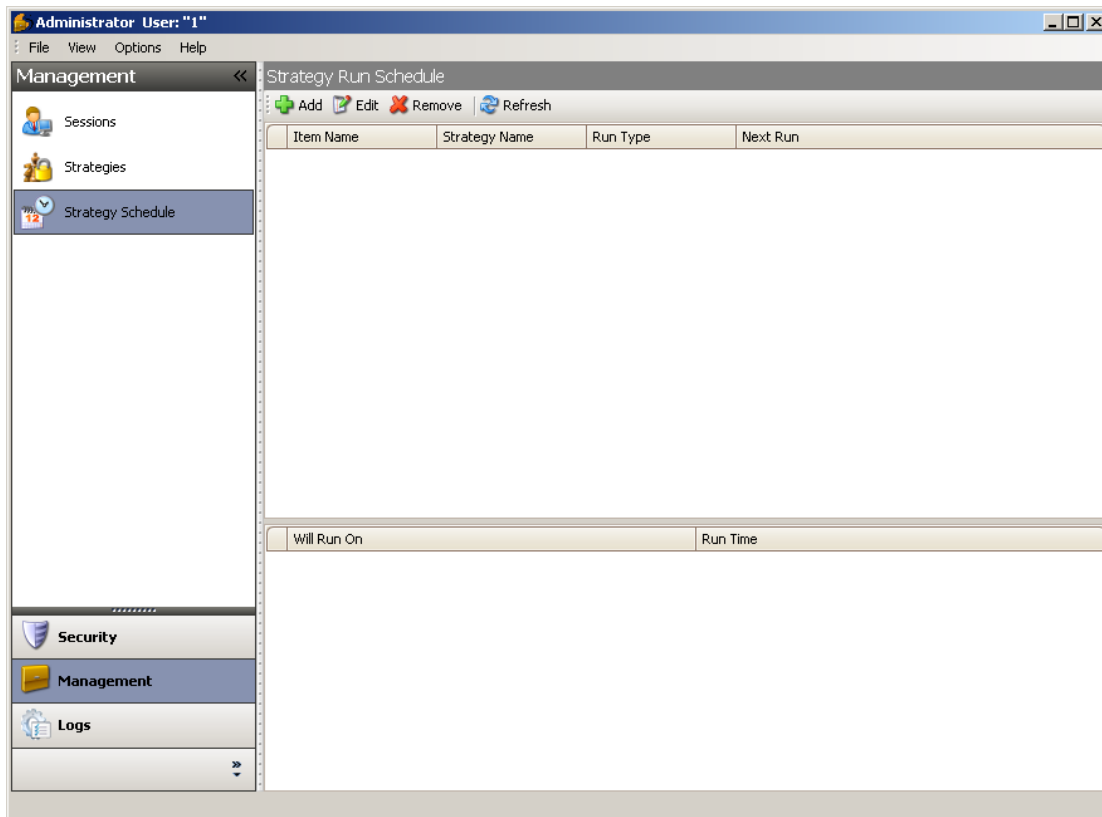




Figure 4-12: Strategy Run Schedule working area

4. To refresh the list of existing schedules, click .
5. On the toolbar, click .

The *Add Schedule* dialog box is displayed:

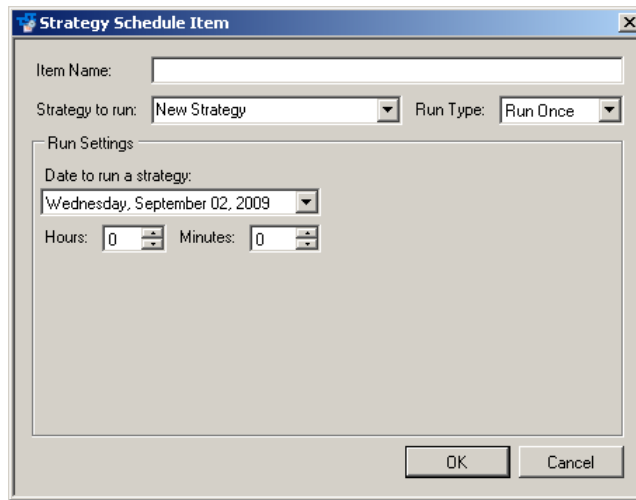


Figure 4-13: Add Schedule dialog box

6. In the **Name** box, enter the name of the new schedule.
7. Add a strategy that must be run on this schedule.
8. Select the type of strategy run – once, weekly or monthly.
9. Set parameters for the schedule:

To run the strategy once, specify the date and time of the strategy:

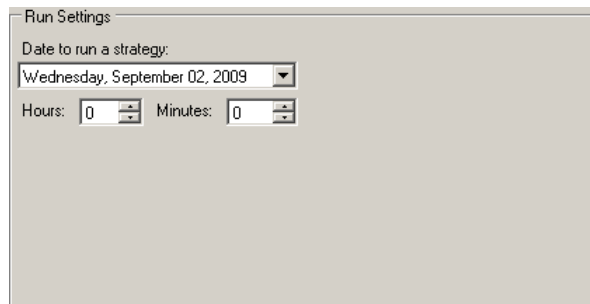


Figure 4-14: Setting a schedule to run the strategy once

To run the strategy weekly, specify the day of week and time of the strategy run:

Run	Day	Hours	Minutes
<input type="checkbox"/>	Sunday	00	00
<input checked="" type="checkbox"/>	Monday	00	00
<input type="checkbox"/>	Tuesday	00	00
<input type="checkbox"/>	Wednesday	00	00
<input type="checkbox"/>	Thursday	00	00
<input type="checkbox"/>	Friday	00	00
<input type="checkbox"/>	Saturday	00	00

Figure 4-15: Setting a schedule to run the strategy weekly

To run the strategy monthly, specify the days of month and time of the strategy run:

Run	Day	Hours	Minutes
<input type="checkbox"/>	1	00	00
<input type="checkbox"/>	2	00	00
<input type="checkbox"/>	3	00	00
<input checked="" type="checkbox"/>	4	00	00
<input type="checkbox"/>	5	00	00
<input type="checkbox"/>	6	00	00
<input type="checkbox"/>	7	00	00
<input type="checkbox"/>	8	00	00

Figure 4-16: Setting a schedule to run the strategy monthly

10. Click **OK**.

The new schedule is successfully added:

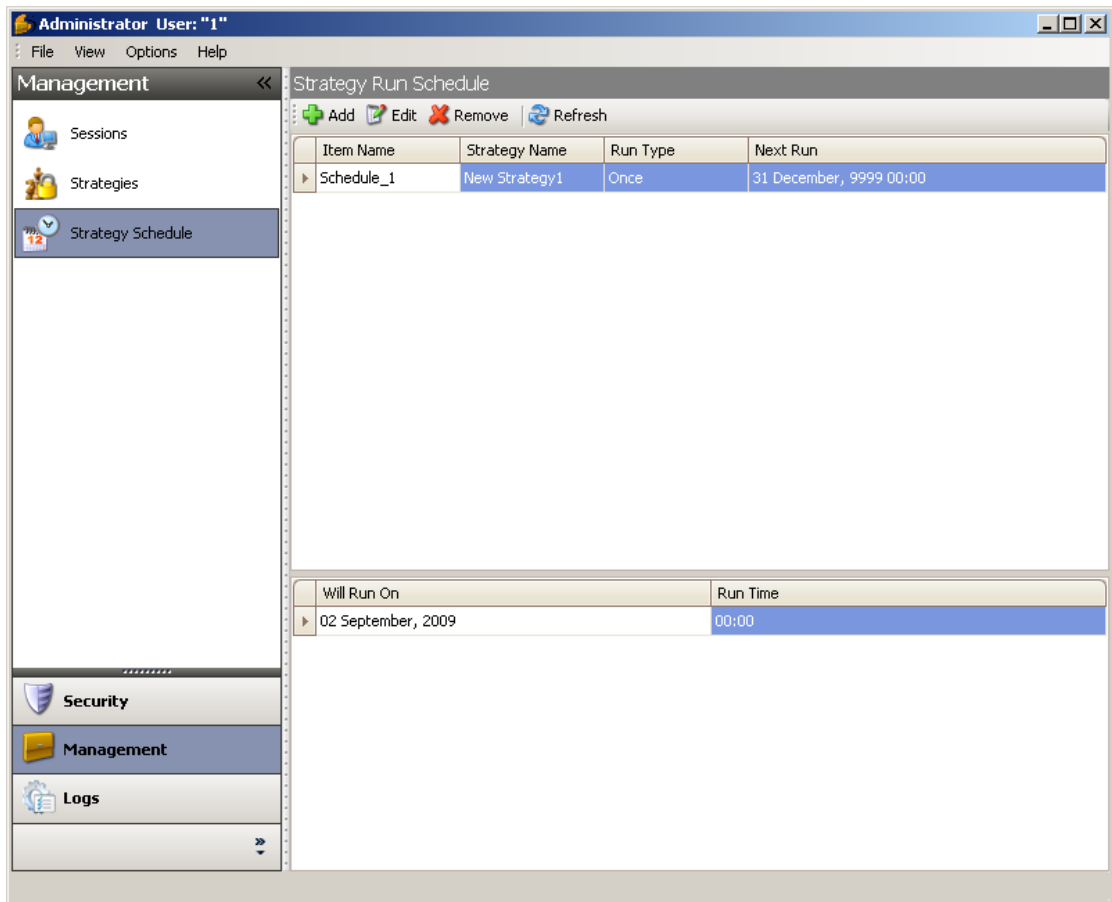


Figure 4-17: New schedule is added

Editing Schedules

This section describes how to edit an existing schedule for running behavioral strategies in the Scortto Administrator application.

To edit a schedule:

1. Log on to the Scortto Administrator application as described in Section *Logging on to the System*, page 12.

The working area of the application is displayed:

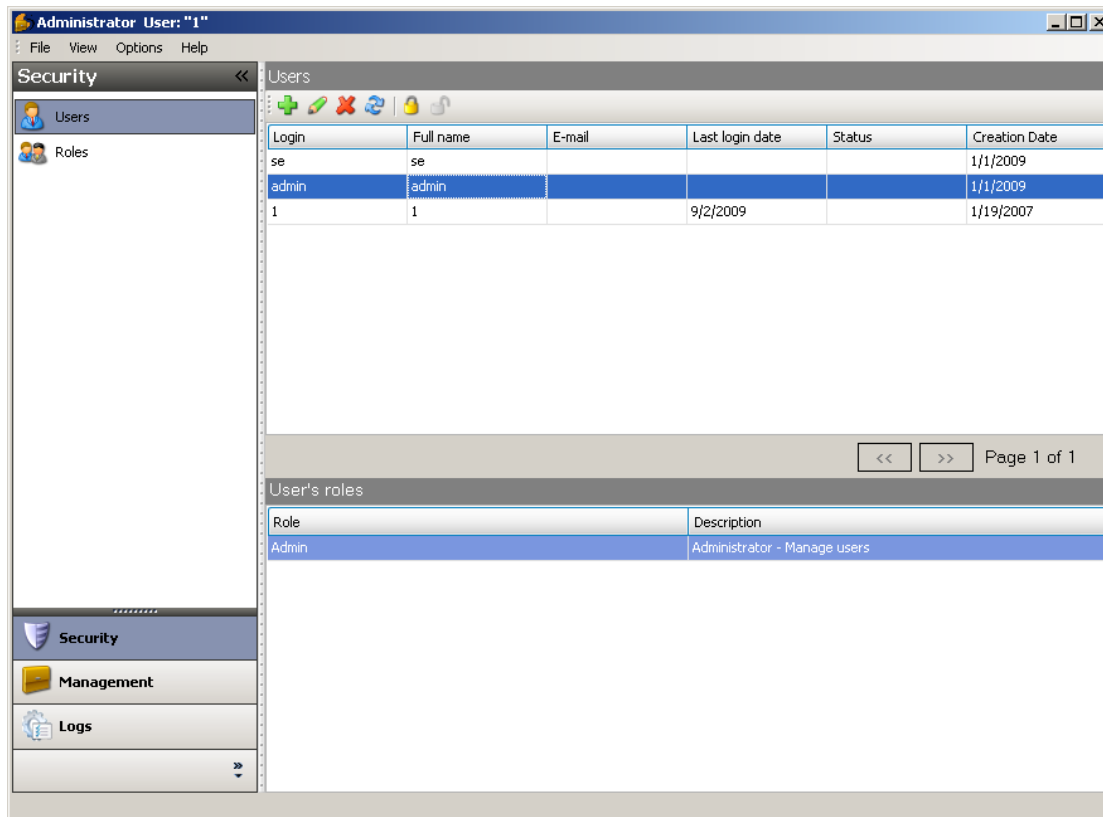


Figure 4-18: Application Scorto Administrator

2. Select the **Management** tab.

The **Sessions** working area is displayed by default:

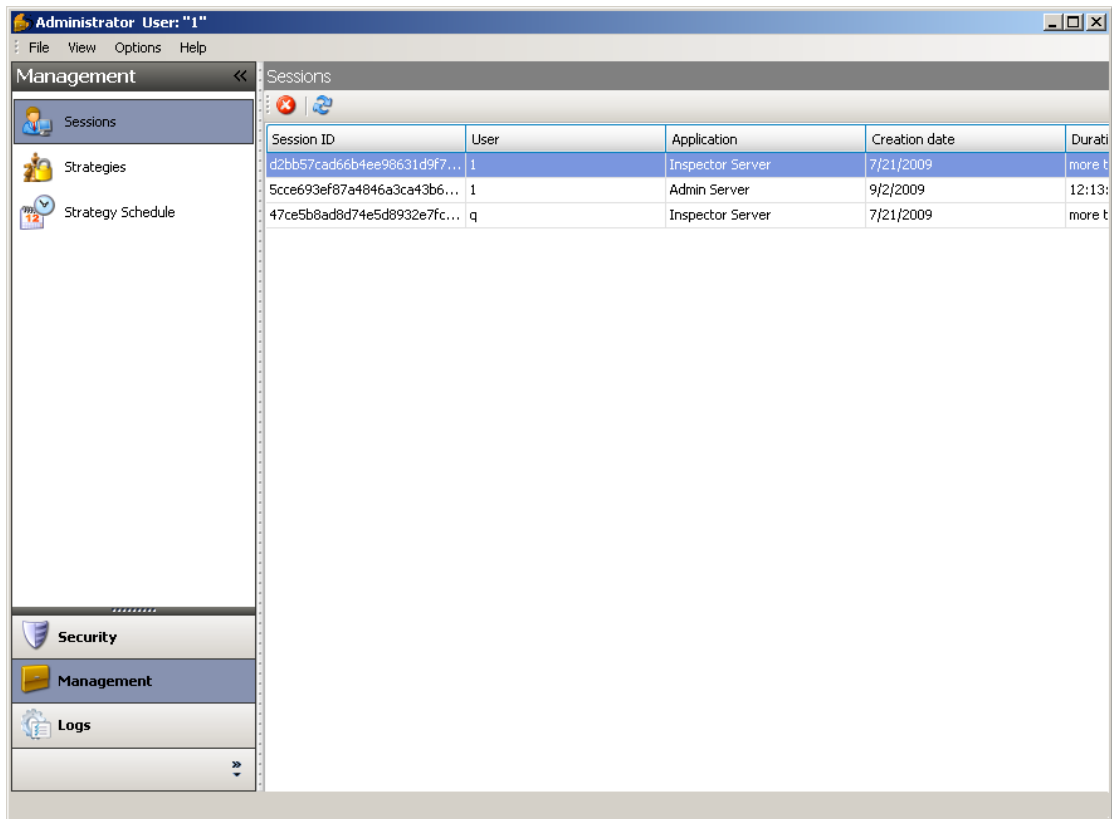


Figure 4-19: Sessions working area

3. In the navigation area, select **Strategy Run Schedule**.

The **Strategy Run Schedule** working area is displayed:

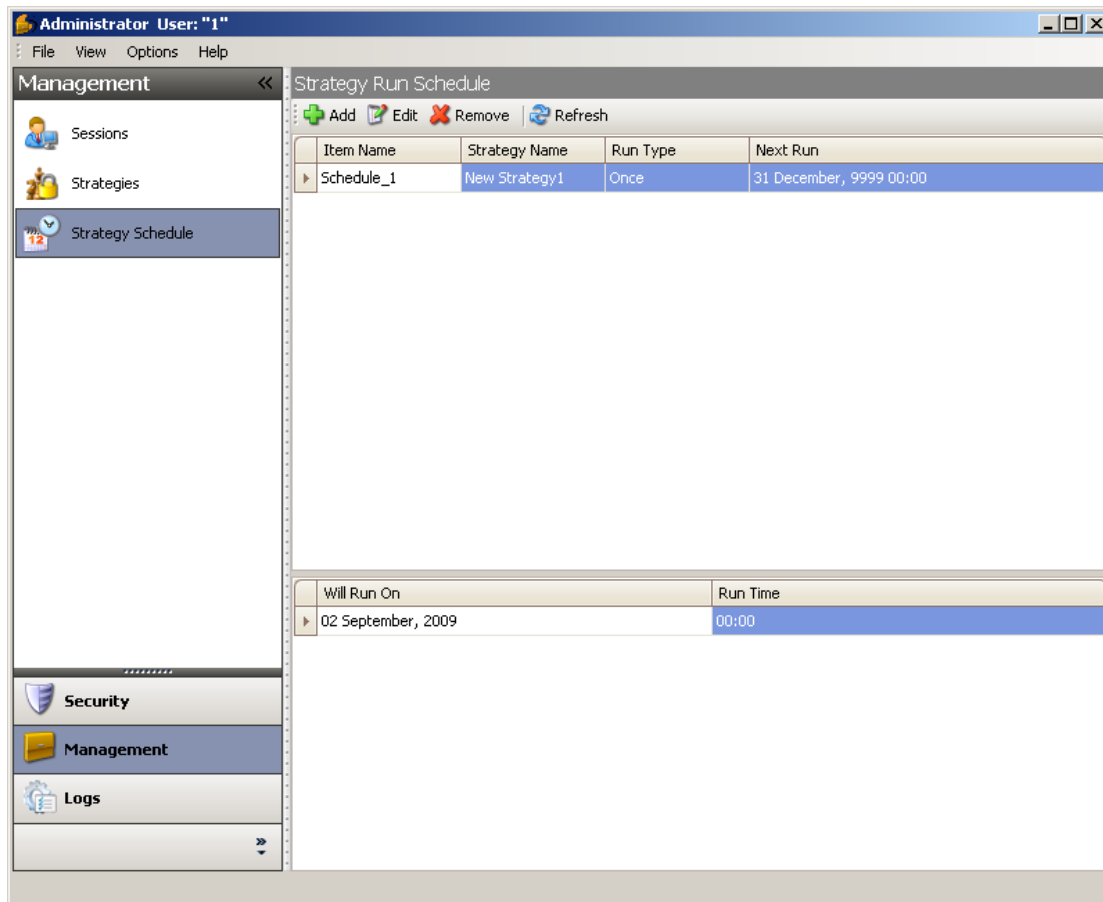




Figure 4-20: Strategy Run Schedule working area

4. To refresh the list of existing schedules, click .
5. Select the schedule that needs editing.
6. On the toolbar, click .

The *Edit Schedule* dialog box is displayed:

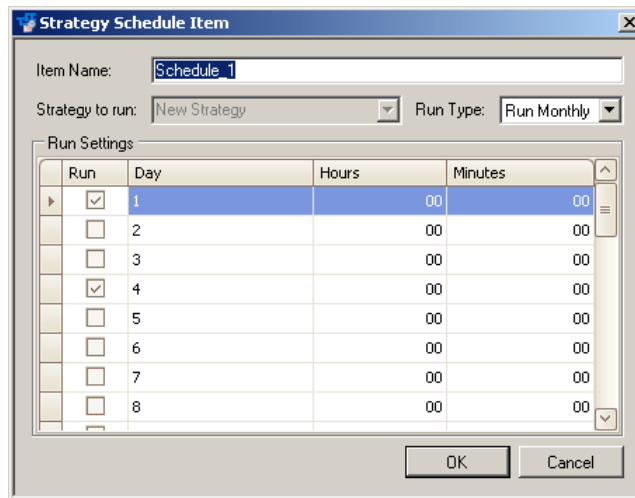


Figure 4-21: Edit Schedule

7. Make the required changes and click **OK**.

The schedule is successfully changed.

Deleting Schedules

This section describes the procedure for deleting an existing schedule in the Scorto Administrator application.

To delete a schedule:

1. Log on to the Scorto Administrator application as described in Section *Logging on to the System*, page 12.

The working area of the application is displayed:

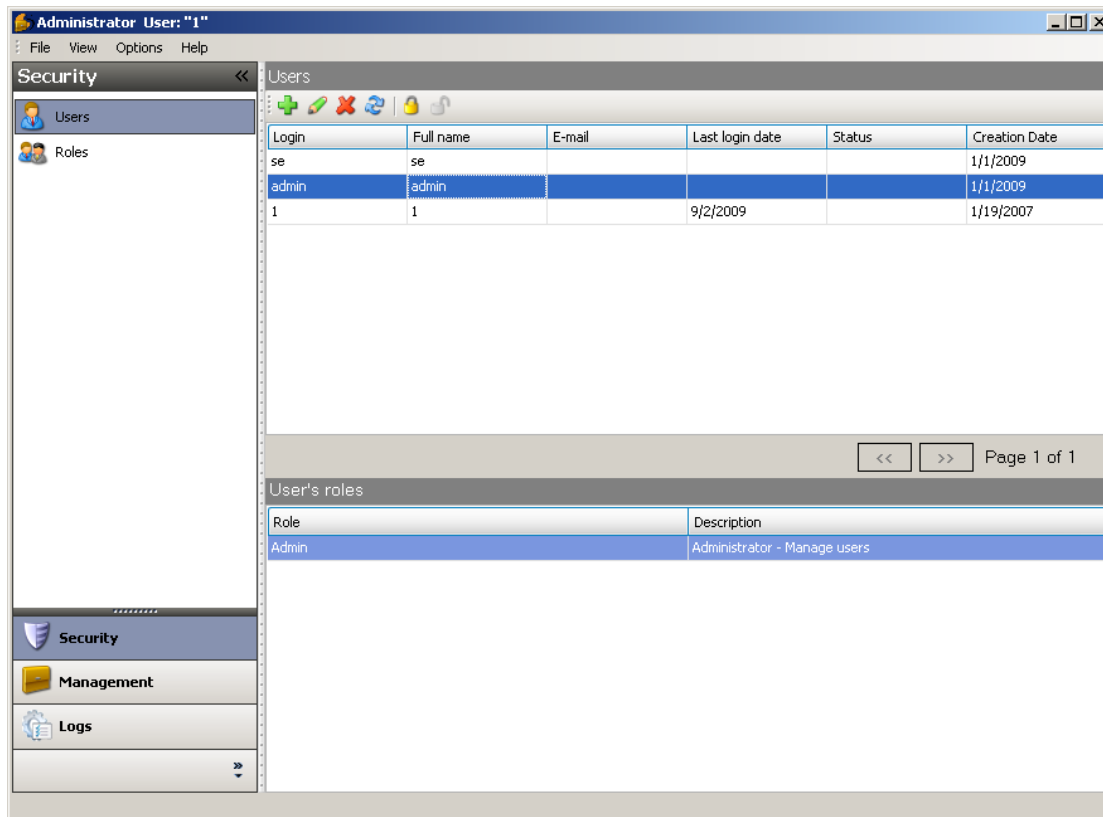


Figure 4-22: Application Scorto Administrator

2. Select the **Management** tab.

The **Sessions** working area is displayed by default:

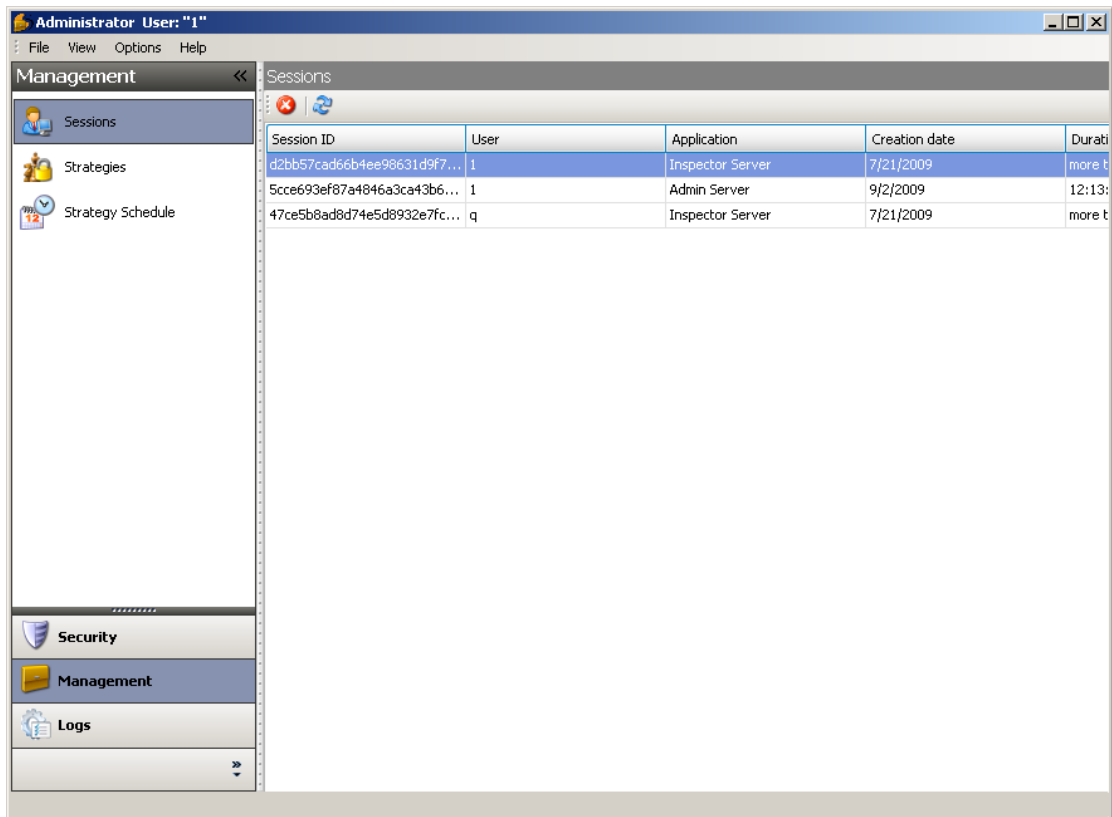


Figure 4-23: Sessions working area

3. In the navigation area, select **Strategy Run Schedule**.

The **Strategy Run Schedule** working area is displayed:

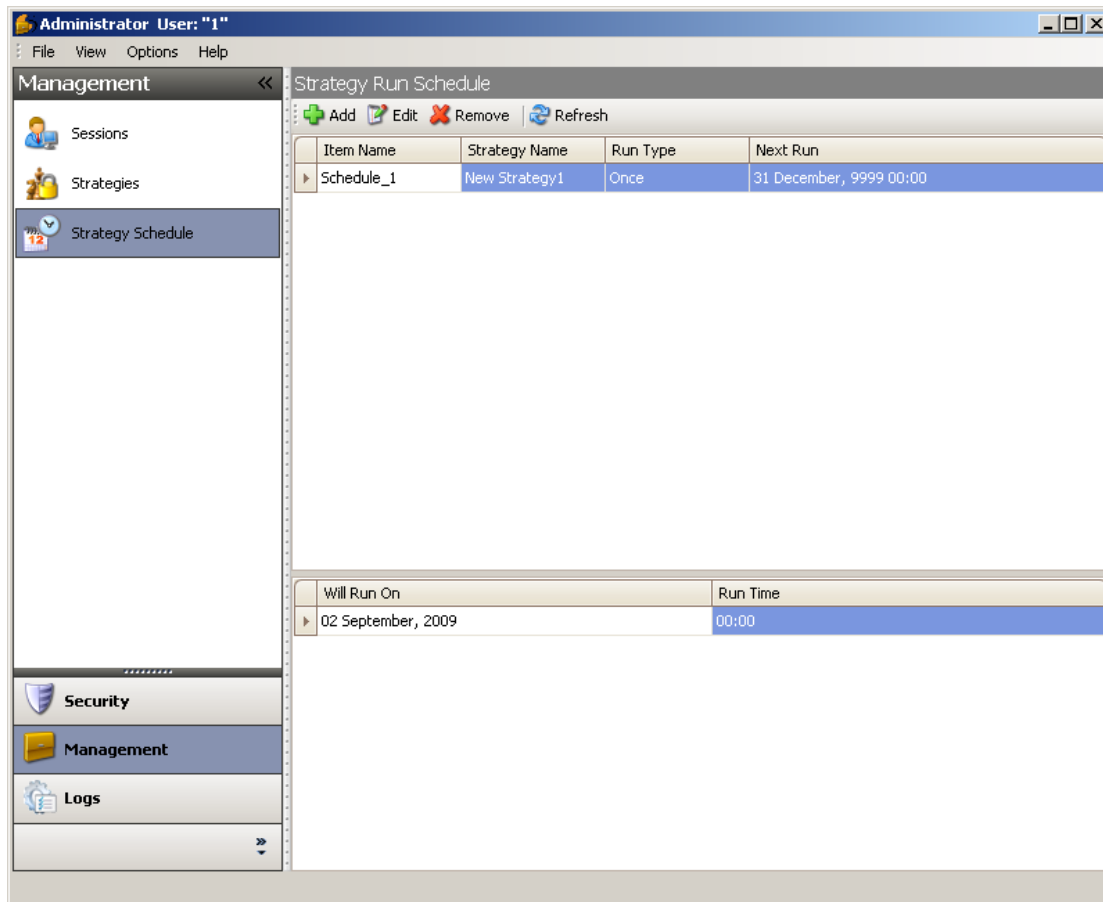




Figure 4-24: Strategy Run Schedule working area

4. To refresh the list of existing schedules, click .
5. Select the schedule that needs deleting.
6. On the toolbar, click .

The following confirmation is displayed to delete the select session:

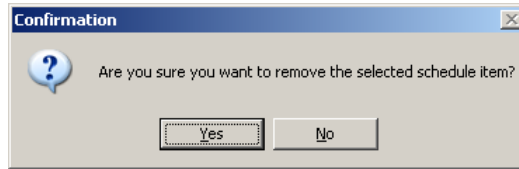


Figure 4-25: Schedule deletion confirmation

6. Click **Yes**.

The selected schedule is successfully deleted.

Viewing System Log

The Scorto Administrator application allows the user with the System Administrator role to view the system log containing the record of events that occurred in the system.

To view the system log:

1. Log on to the Scorto Administrator application as described in Section *Logging on to the System*, page 12.

The working area of the application is displayed:

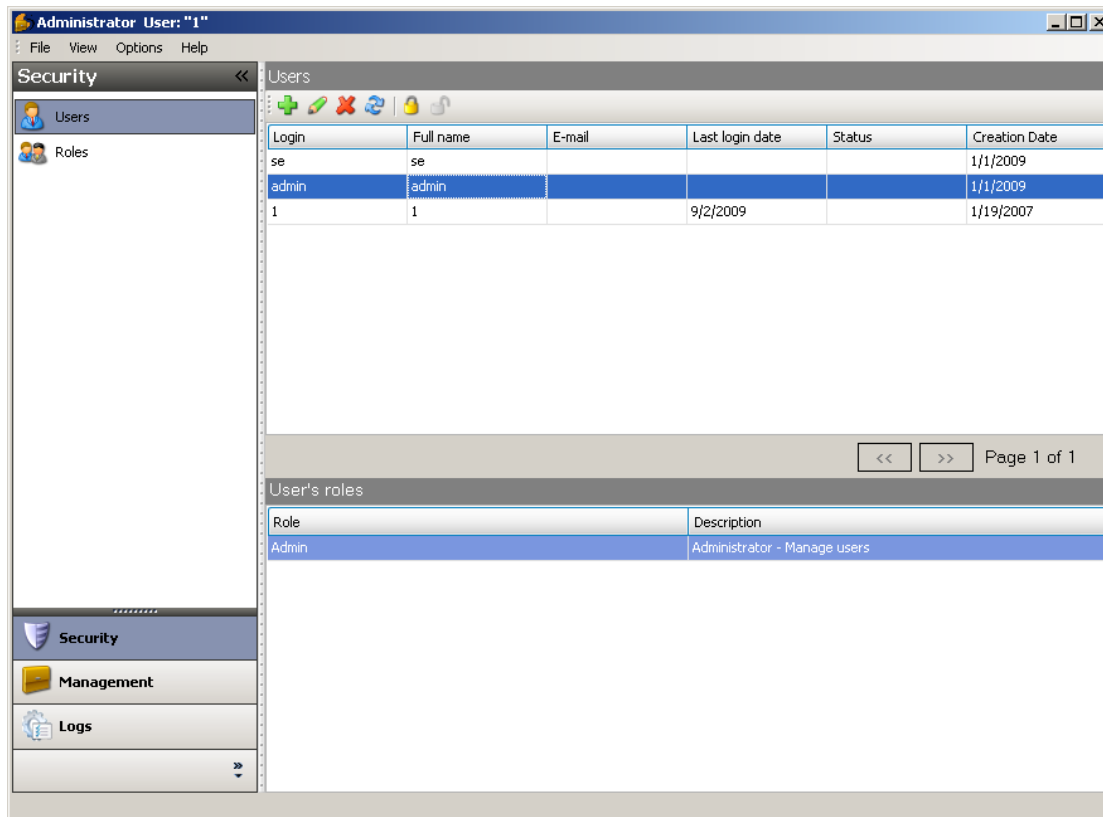


Figure 4-26: Application Scorto Administrator

2. Select the **Logs** tab.

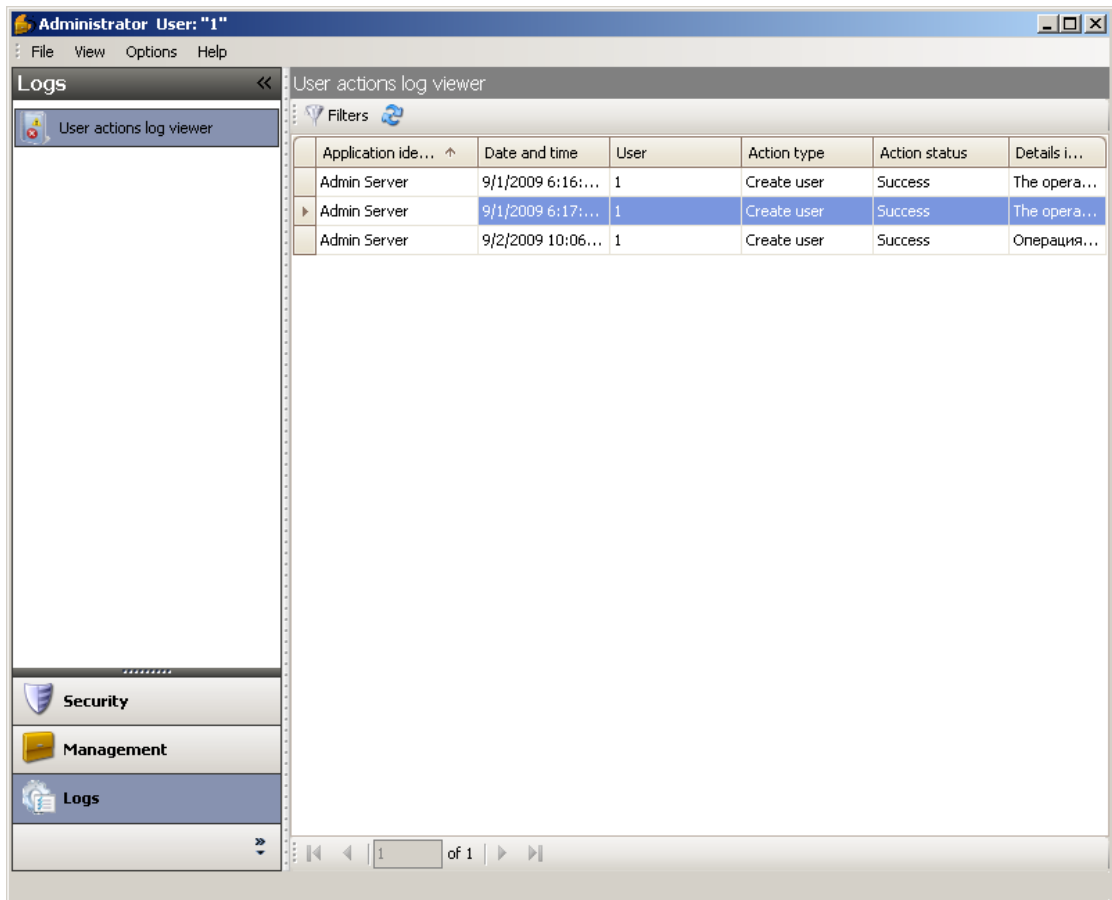

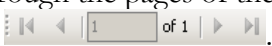


Figure 4-27: Logs working area

3. To refresh the list of records in the log, click .
4. If necessary, navigate through the pages of the log using the navigation bar .

When viewing records in the log, the user can use the filtering function.

To use the filtering function:

1. Click .

The Log filters dialog box is displayed:

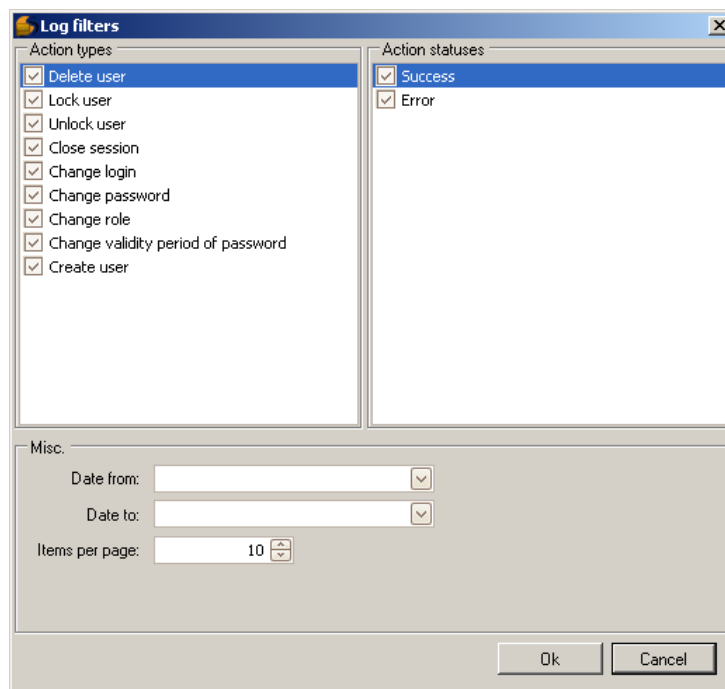


Figure 4-28: Adjusting the filtering mode

2. Set the action type and status to be displayed.
3. If necessary, set the time range through specifying the start and end dates.
4. If necessary, set the number of records on the page.
5. Click **OK**.

The filtering mode is successfully set.