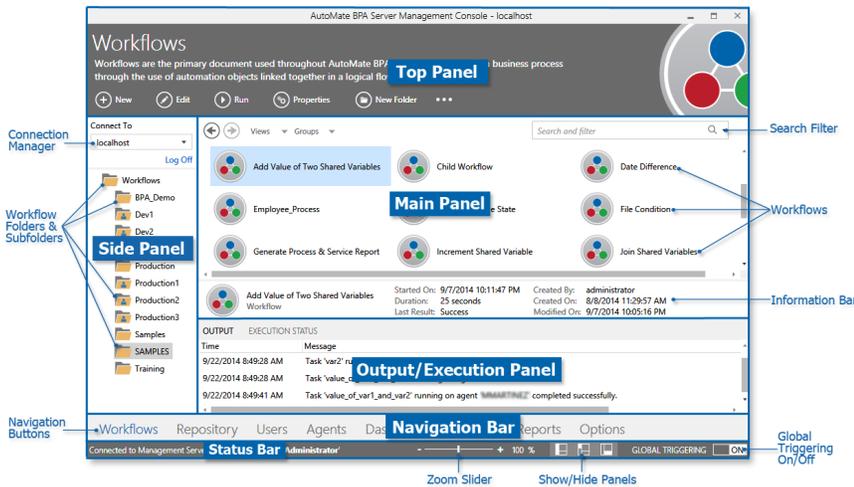


## Server Management Console



**Workflows:** Create and manage workflows, which are high level objects that contain other objects such as tasks, events, and conditions all linked together with flow control arrows. Workflows orchestrate and display complex operations in a graphical form, allowing processes to be more compliant, agile, and visible.

**Repository:** Created objects, such as workflows, tasks, conditions, and agents, are automatically stored in the repository for reuse. This provides a central location in which to store newly created objects and conveniently access existing ones.

**Users:** Administrators can create and manage users as well as create user groups and assign specific users to each group. They can also define roles for each user or group to determine what permissions the user/group is allowed on the system.

**Agents:** Agents and agent groups enable multi-machine executions to take place within a single workflow. Once an agent is deployed/installed on a remote computer, the server can readily communicate with it and control its execution.

**Dashboard:** View real-time information regarding workflow execution, CPU usage, connected agents, pending tasks, and other process and system related data. This interface supplies a variety of fully customized digital gauge controls, counters, and grids.

**Calendar:** View a timetable format that supplies detailed information about the results of previously executed workflows and tasks as well as ones that are scheduled to run at a future date/time (with the use of a schedule event to trigger execution).

**Reports:** View and generate reports made up of charts or tables that display vital information regarding all aspects of your automation environment, such as execution analysis, historical performance, repository content, trigger activities, and much more.

**Options:** Set server preferences and properties as well as various options that influence the behavior of Server Management Console.

## FUNDAMENTALS

### To create a workflow:

1. On the Navigation Bar, select **Workflows**.
2. Click the **New** button on the Top Panel -OR- Right-click anywhere on the Main Panel and select **New > Workflow**.
3. Follow the instructions provided by the Add Workflow Wizard, which will guide you through the necessary steps required to create a workflow.

### To view or edit a workflow:

Do one of the following:

- Select the workflow and click the **Edit** button on the Top Panel.
- Right-click the workflow and select **Edit**. This opens Workflow Designer.

### To manually run a workflow:

Do one of the following:

- Select the workflow and click the **Run** button on the Top Panel.
- Right-click the workflow and select **Run** from the context menu.

## KEYBOARD SHORTCUTS

Ctrl+F5	Run selected
Ctrl+H	Help menu
Ctrl+M	More menu
Ctrl+1	Workflows section
Ctrl+2	Repository section
Ctrl+3	Users section
Ctrl+4	Agents section
Ctrl+5	Dashboard section
Ctrl+6	Calendar section
Ctrl+7	Reports section
Ctrl+8	Options section
Alt+Enter	Properties menu
Ctrl+Enter	Edit
Ctrl+Insert	Create folder
Insert	Create new object
Delete	Delete selected

## Server Management Console Basics

### To deploy an agent:

1. Select **Agents** from the Navigation Bar.
2. Select the **Task Agents** folder and click **Deploy** on the Top Panel.
3. Follow the steps in the Agent Deployment Wizard, which will help you deploy Agents to other computers on your network.
  - a. Select whether the destination computers belong to a **Domain** or **Workgroup**.
  - b. Select the Agent's destination from a computer list via one of the following methods:
    - **Network**—Computers on the network.
    - **Active Directory**—Computers in the Active Directory.
    - **Manual Configuration**—Manually enter computer information.
  - c. Enter the user name/password of a domain administrator or user with administrative rights on the computer(s) where agents will be deployed.
  - d. Enter the user name/password of the AutoMate BPA Server administrator or user configured as an administrator in order to properly authenticate the new agent(s).
4. After entering required data, click **Next** to start the deployment process.
5. When deployment completes, the last screen will show results of the deployment attempt.

### To create a user:

1. Select **Users** from the Navigation Bar.
2. Select the **Users** folder and click **New** (Top Panel).
3. Enter the desired user name for the user.
4. Enter a BPA Server password or toggle the option **Authenticate with Active Director password**.
5. Click **OK** upon completion.

### To create/modify a user group:

1. Select **Users** from the Navigation Bar.
2. Select **User Groups** folder and click **New** (Top Panel).
3. Enter a name for the new user group.
4. Right-click the user group and select **Edit**.
5. Move the desired users from the **Available Users** list onto the **Users in Group** list.
6. When finished, click the **Update** button to save changes.

## Logging onto Server Management Console

Administrators can create individual users, assign them to groups, and modify each user's level of access to AutoMate BPA Server resources.

### To log onto SMC:

1. From the Connection Manager, use the drop-down arrow to select a connection. Remote SMC connections require the remote computer's name or IP address. Otherwise, the default connection would be localhost.
2. Click the **Logon** link. The Logon to BPA Server dialog appears.
3. Enter the user name in the **User Name** field.
4. Enter the password in the **Password** field.
5. To save this connection to memory, tick the option **Remember these details**.
6. Click **Login** to complete the logon process.

## ADMINISTRATION

### To set up a default user:

1. Navigate to **Options > Default Properties > Default Task Agent Properties > Default User**.
2. Specify the user name, password and domain name. These credentials will be used to log on or unlock a workstation in order to run an interactive task.
3. Enter the logon and unlock key-strokes sequence/delay to use in order for an agent to successfully log onto or unlock the workstation.
4. Click **OK** upon completion.

### To set up a default agent:

1. Navigate to **Options > Default Properties > Default Workflow Properties > Default Agent**.
2. Select a default agent from the drop-down list of agent names.
3. Click **OK** upon completion.

### To set system security:

1. Navigate to **Options > Server Settings > System Security**.
2. Add the desired group/user(s) from the **Available Group/Users** list onto the **Selected Group/User** list.
3. Set the permissions (i.e., **Allow** or **Deny**) that the selected groups/users have on the system.
4. Click **OK** upon completion.