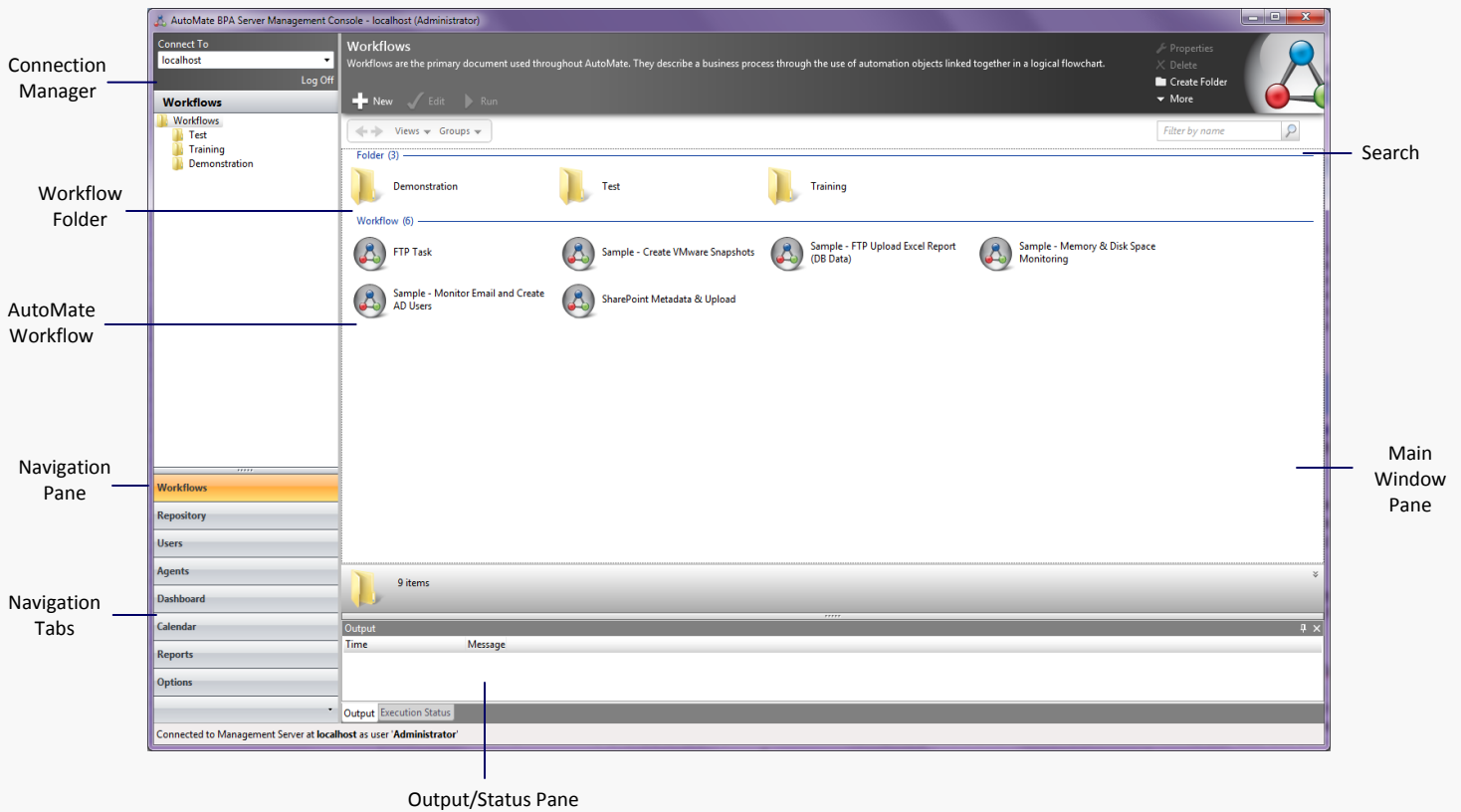


AutoMate BPA Server Management Console



The Fundamentals

To Create a Workflow:

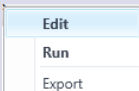
1. Click on *Workflows* navigation tab.
 2. Click on the **New** button.
 3. Enter a workflow name.
- OR**

1. Right click on **Main Window Pane** → **New** → **Workflow**.

To Open/Edit a Workflow:

1. Click on *Workflows* navigation tab.
 2. Select the workflow.
 3. Click on the **Edit** button.
- OR**

1. Right click on workflow → **Edit**.



Navigation Pane

Workflows To create/modify/manage workflows, which are high-level objects that hold other objects such as tasks, flow controls, and conditions. They act as flow diagrams of IT processes and include information required for automated execution.

Repository The storage area of all workflow-related objects such as tasks, conditions, and events. Repository objects can be edited, reused, and incorporated into new workflows.

Users To create/modify/manage AutoMate users, user groups, roles and permission. *

Agents To deploy and manage agents and agent groups. Agents allow task execution on any machine on the network in which an agent has been deployed.

Dashboard An interface that supplies a variety of digital gauge controls to convey real time streaming data regarding workflow execution, CPU usage, connected agents, pending tasks and other process and system related data.

Calendar A timetable format that supplies detailed information about the results of previously executed as well as scheduled workflows and tasks.

Reports Contains a completed set of reports that display the status and condition of workflows, tasks, triggers and audit events.

Options To set server preferences and properties as well as various options that influence the behavior of the SMC.

*Available in AutoMate BPA Server 9 Enterprise Edition.

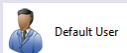
Keyboard Shortcuts

F5	Run workflow
Ctrl+A	Select All
Ctrl+C	Copy
Ctrl+H	Help Menu
Ctrl+C	Copy
Ctrl+M	More Menu
Ctrl+V	Paste
Ctrl+Y	Redo
Ctrl+Z	Undo
Ctrl+1	Workflows Tab
Ctrl+2	Repository Tab
Ctrl+3	Users Tab
Ctrl+4	Agents Tab
Ctrl+5	Dashboard Tab
Ctrl+6	Calendar Tab
Ctrl+7	Reports Tab
Ctrl+8	Options Tab
Ctrl+Enter	Edit
Ctrl+Ins	Create Folder
Alt+Enter	Properties Menu
Del	Delete
Ins	Create New

Administration

To Setup Default User:

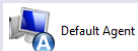
- In the SMC, click on **Options** tab → **Default Properties** → **Default User**.



- Specify the username, password and domain.

To Setup Default Agent:

- In the SMC, click on **Options** tab → **Default Properties** → **Default Agent**.



- Select an agent from the drop-down menu.
- Click on the **Apply** button.

To Add/Edit Holiday Library:

- In the SMC, click on **Options** tab → **Server Settings** → **Holidays**.

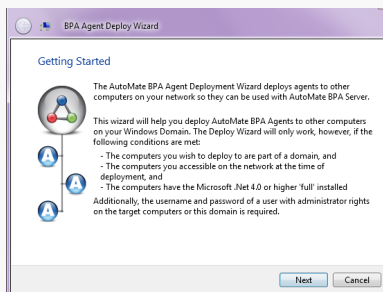


- Select a country from the **Categories** section.
- Click on:
 - New** button to create new holiday file.
 - Delete** button to delete.
 - Edit** button to modify holidays.

The Basics

To Deploy an Agent:

- In the SMC, select **Agents** navigation tab.
- Select **Task Agent** folder **Task Agents** from the *Navigation Pane*.
- Click on the **Deploy** button.
- Follow the steps in the *Agent Deployment Wizard*:
 - Click on the **Next** button to start.



- Retrieve a computer list to deploy an agent via one of these methods: Network, Active Directory or Manual.
- Highlight the computer(s) for agent deployment and click **Next**.
- Enter the username and password of a domain administrator with permission on the computer(s) where an Agent will be deployed. Click the **Next** button.
- Enter the AutoMate BPA Server username and password with permission on BPA to deploy an Agent. Click the **Next** button.
- Click the **Finish** button after the *Agent Deployment Wizard* completes.

To Create a User*:

- In the SMC, select **Users** navigation tab.
- Select **Users** folder **Users** from the *Navigation Pane*.
- Click on the **New** button.
- Select the authentication type:
 - Authenticate with BPA Server password.
 - Authenticate with Active Directory password.
- Click the **Apply** button.

Add a User

A user has specific restrictions on what can be done within the program.



Username:

Authenticate with BPA Server password

Password:

Confirm password:

Authenticate with Active Directory password

To Create/Modify a User Group*:

- In the SMC, select **Users** tab.
- Select **User Groups** folder **User Groups** from the *Navigation Pane*.
- Click on the **New** button.
- Enter a name for the user group.
- Click on the **Edit** button.
- Highlight user(s) under the *Available Users* menu.
- Click on the **Move** button.
- Click on the **Update** button.

AutoMate BPA Server 9 Email Error Notifications

To Email Global Workflow Error Notification:

- In the SMC, click on **Options** tab → **Server Properties** → **SMTP** to configure the email server.
- Click on **Options** tab → **Default Properties** → **On Workflow Error**.
- Enter the To & From email addresses. Separate multiple email addresses with a comma (,) or a semi-colon (;).

On Workflow Error

Specifies the events that should occur in the event of a workflow error such as expression evaluation.

E-mail error notification for this workflow

To:

From:

NOTE: The SMTP properties on the server must be specified for emails to be sent.

To Email Global Task Error Notification:

- In the SMC, click on **Options** tab → **Default Properties** → **On Task Error**.
- Enter the To & From email addresses.

To Email Workflow Level Workflow/Task Error Notification:

- Double click a workflow.
- From the workflow properties, select:
 - On workflow Error for workflow error notification.
 - On Task Error for task error notification.
- Click on link to overwrite system properties. Enter the To & From email addresses.

*Available in AutoMate BPA Server 9 Enterprise Edition.