helpsystems

User Guide

Automate Ops Console for Insite

1.10

About Automate Ops Console

Overview

Automate Ops Console is a simple yet intuitive web-based interface that allows you to conveniently monitor, control, and manage your Automate Enterprise resources anywhere, at any time, via a web browser. You can use the Ops Console to access information about your Workflows, Tasks, Processes, Agents, and system resources for each of your Automate Enterprise installations so you can quickly ascertain the overall status of your automation environments, all from a single location. You can also use it to manually execute your workflows or run individual tasks or processes on specified agents.

Dashboard

The Ops Console comes equipped with a Dashboard and a variety of Widget controls that allows you to actively monitor agent activities, deviations, queued workflows, run statistics, and a variety of other system related data that can be of crucial importance. You can choose which widgets to use and customize their size to better manage the type and amount of data to be displayed on the dashboard. With all of this information in one location, you can quickly detect and correct any problems that may occur.

Sidebar Menu

The sidebar menu enables easy navigation throughout the various sections of the Ops Console. Each section displays specific types of information that you can use to identify errors, failed executions, and performance issues. You can narrow the scope of information in these sections, and set the refresh rate to update the information only as frequently as you need it. All of this information helps you to better balance your system workload, troubleshoot problems, and schedule future workflow executions more efficiently.

Benefits

With the Automate Ops Console, you can:

- Manually run workflows, tasks or processes.
- Monitor active instances of workflows, tasks or processes.
- Track historical data regarding previous executions of workflows, tasks or processes.
- View queued workflows or forecast future workflow executions.
- View important statistics, such as total number of active instances, queued workflows and connected agents.
- View information about past and present activities that occurred on a specific agent.
- Examine the hardware performance of your Automate Enterprise environment.
- Track workflow or task deviation to gather accurate runtime metrics and determine whether workflows and tasks are performing as expected.

As long as you have a computer connected to the Internet and a web browser, you have the freedom to access your Automate Enterprise systems from a single location, 24 hours a day, 7 days a week.

Getting Started Guide

Automate Ops Console is a simple yet intuitive web-based interface that allows you to conveniently monitor, control, and manage your Automate Enterprise resources anywhere, at any time, via a web browser. You can use the Ops Console to access information about Workflows, Tasks, Processes, Agents, and system resources for each of your Automate Enterprise installations so you can quickly ascertain the overall status of your automation environments, all from a single location. You can also use it to manually execute your workflows or run individual tasks or processes on specified agents.

Before you can use the Ops Console to monitor and control your Automate Enterprise resources, you must first do the following:

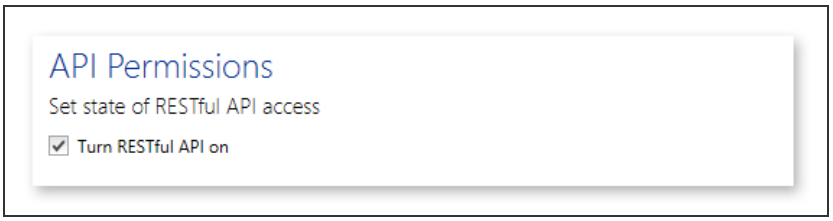
- Enable API Security in Automate Enterprise Management Console.
- Establish a connection between Ops Console and Automate Enterprise.

API Security

API Security gives administrators the ability to manage and protect Automate Enterprise API resources through encryption and authentication. With Automate Enterprise Standard Edition, you must first turn RESTful API on in order to expose the API in Ops Console. With the Enterprise Edition, you also have the capability of assigning elements of authority to users or user groups based on the amount of access they should have on specific API lists when using Ops Console.

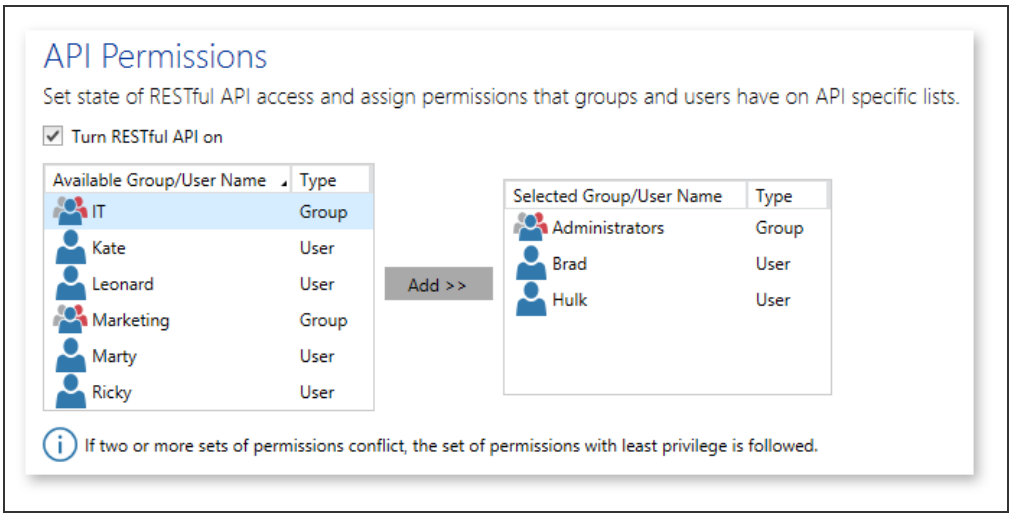
To turn on RESTful API (Standard Edition):

1. From Automate Enterprise Management Console, navigate to **Options** -> **Server Settings** -> **API Security**.
2. From the API Security page, add a check-mark to the option **Turn RESTful API on** (turned off by default).

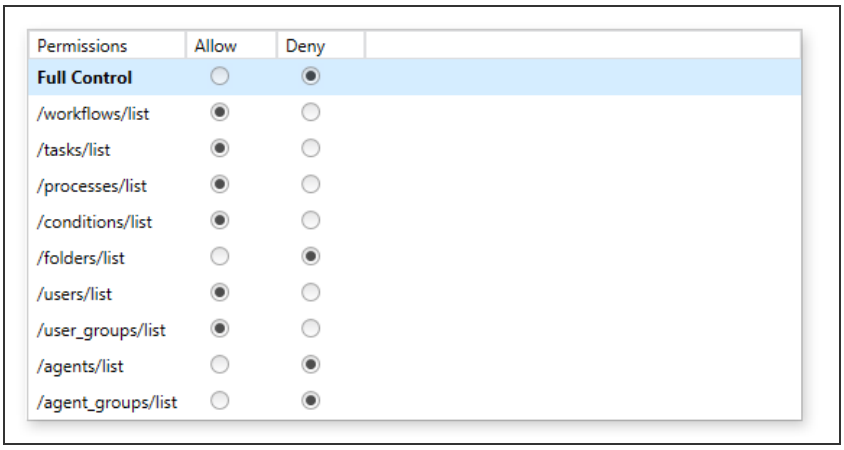


To turn on RESTful API and set API permissions (Enterprise Edition):

1. From Automate Enterprise Management Console, navigate to **Options** -> **Server Settings** -> **API Security**.
2. From the API Security page, add a check-mark to the option **Turn RESTful API on** (turned off by default).
3. Do one of the following:
    - Select the desired user or group from the Available Group/User Name (top left) pane and click **Add** to add it to the Selected Group/User Name (top right) pane.
    - Double-click a user or group from the Available Group/User Name pane. This will add it to the Selected Group/User Name pane.



4. Select the user or group from the Selected Group/User Name pane and for each permission level in the Permissions (bottom) pane, specify whether that user/group should be allowed or denied access to the resource.



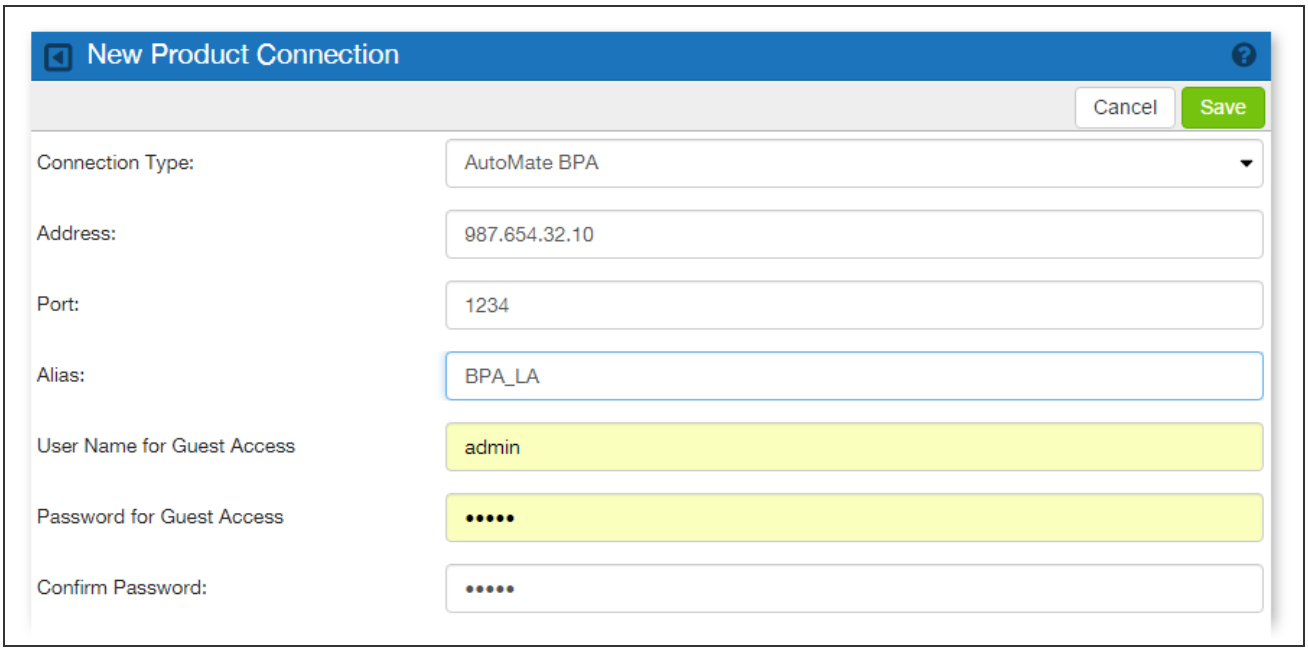
5. When finished, click **OK** to save your settings.

Automate Enterprise Connection

Before you can use the Ops Console, you must establish a connection between Ops Console and Automate Enterprise. This can be done from the Ops Console's Product Connections or Quick Start page.

To establish a connection from the Product Connections page:

1. From Ops Console, navigate to **Settings** -> **Product Connections**.



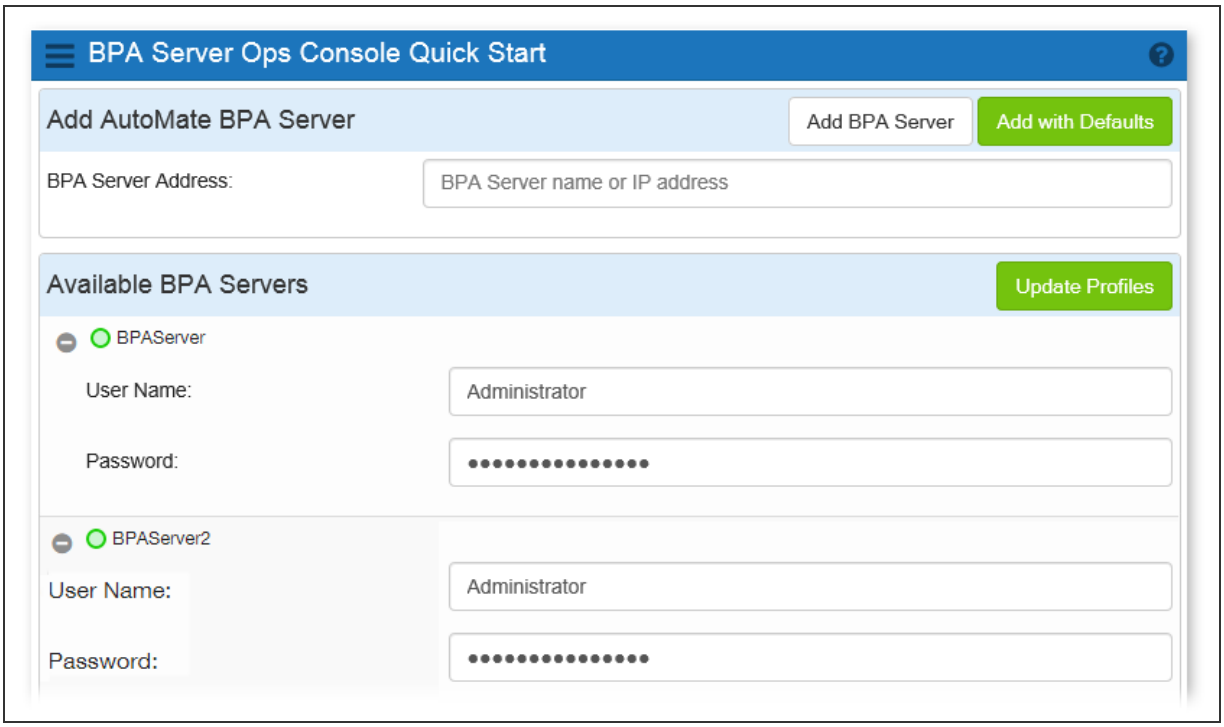
2. Click **Add**. This opens the New Product Connection page.
3. Enter the following parameters:

- **Connection Type**: The type of connection to establish. You must select the option **Automate Enterprise** as the connection type.
- **Address**: The computer name or IP address of the computer where Automate Enterprise is installed.
- **Port**: The communication port to use for this connection.
- **Alias**: The display name to associate with this Automate Enterprise connection. This name will be used throughout the interface as a way to identify this connection.
- **User Name for Guest Access**: A valid user name used to log onto Automate Enterprise.
- **Password for Guest Access**: The password to authenticate the user name entered above.
- **Confirm Password**: Re-enter the password as a form of confirmation.

4. Click **Save** to save your settings.

To establish a connection from the Quick Start page:

1. From Ops Console, select **Quick Start** under the Automate menu.



2. Click **Add Automate**. This displays the new connection settings.
3. Enter the following parameters:

- **Connection Type**: The type of connection to establish. You must select the option **Automate** as the connection type.
- **Address**: The computer name or IP address of the computer where Automate Enterprise is installed.
- **Port**: The communication port to use for this connection.
- **Alias**: The display name to associate with this Automate Enterprise connection. This name will be used throughout the interface as a way to identify this connection.
- **User Name for Guest Access**: A valid user name used to log onto Automate Enterprise.
- **Password for Guest Access**: The password to authenticate the user name entered above.
- **Confirm Password**: Re-enter the password as a form of confirmation.

4. Click **Save** to save changes. The new connection will appear under the Available Automate Enterprises section.

The Quick Start page also allows you to create a new connection that uses the same properties as your default Automate Enterprise set via the **Default Automate Enterprise** parameter in the Preferences page.

To establish a connection that uses default server properties:

1. In the **Automate Enterprise Address** parameter, enter the computer name or IP address of the computer where Automate Enterprise is installed.
2. Click **Add with Defaults**. All necessary properties such as Port, Alias, User Name and Password will be retrieved from the default Automate Enterprise. The new connection will appear under the Available Automate Enterprises section.

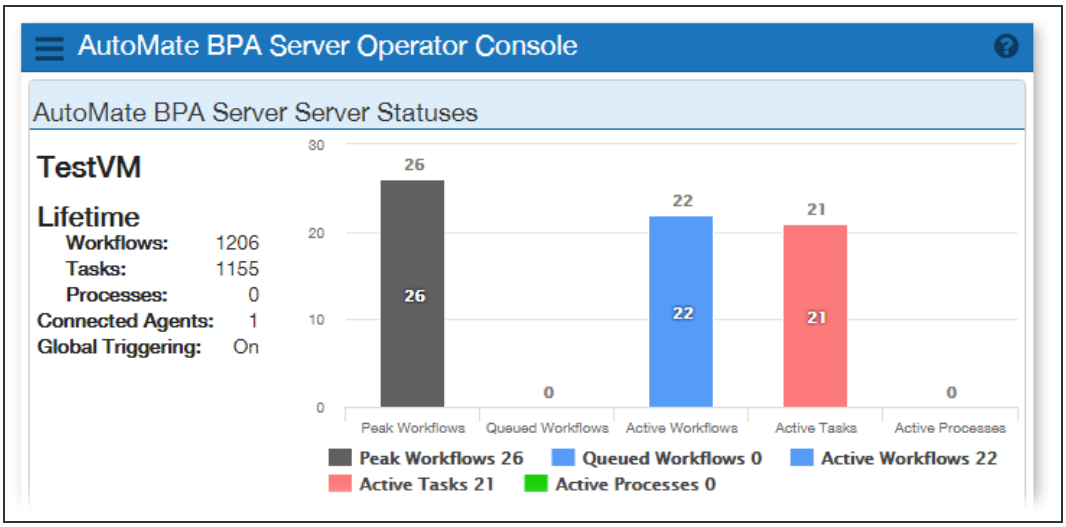
Home

The Automate Ops Console Home page contains two main displays, Automate Enterprise Statuses and Automate Ops Console License.

To access the Home page, from the main menu, select **Home**.

Automate Statuses

The Automate Statuses section displays important statistics about your automation environment in an easy to read interface.

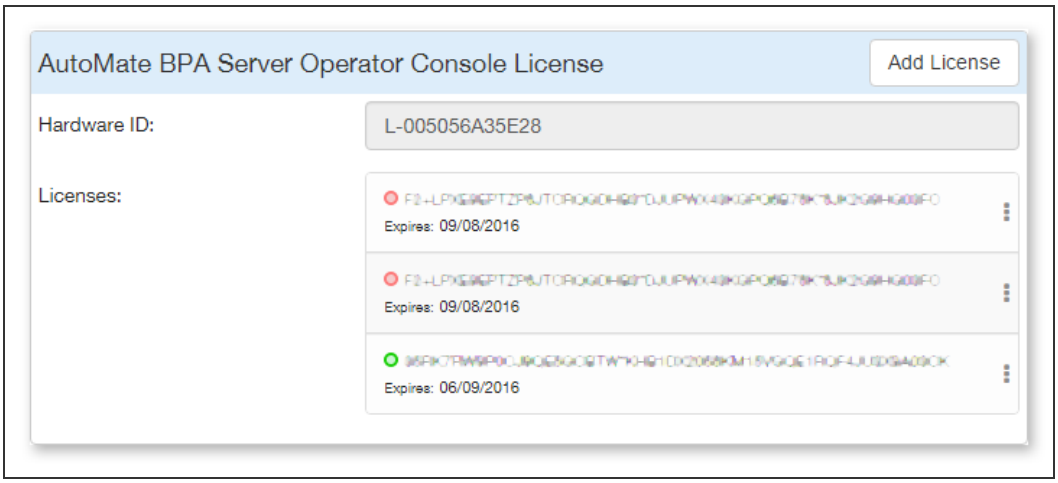


The following describes the available statistics shown by the Automate Enterprise Statuses section.

- **Lifetime (Workflows, Tasks, Processes)**: Displays the total number of workflows, tasks and processes that ran ever since the start of the service. This includes workflows, tasks or processes that ran successfully, failed or aborted.
- **Connected Agents**: Displays the number of presently connected agents. This includes task agents and process agents.
- **Global Triggering**: Displays whether global triggering is currently turned **On** or **Off**.
- **Peak Workflows** : Displays the highest number of workflows that the server ever ran simultaneously ever since the start of the service.
- **Queued Workflows**: Displays the total number of workflows that are currently in a queued state.
- **Active Workflows**: Displays the total number of workflows that are currently in a running state.
- **Active Tasks**: Displays the total number of tasks that are currently in a running state.
- **Active Processes**: Displays the total number of processes that are currently in a running state.

Automate Ops Console License

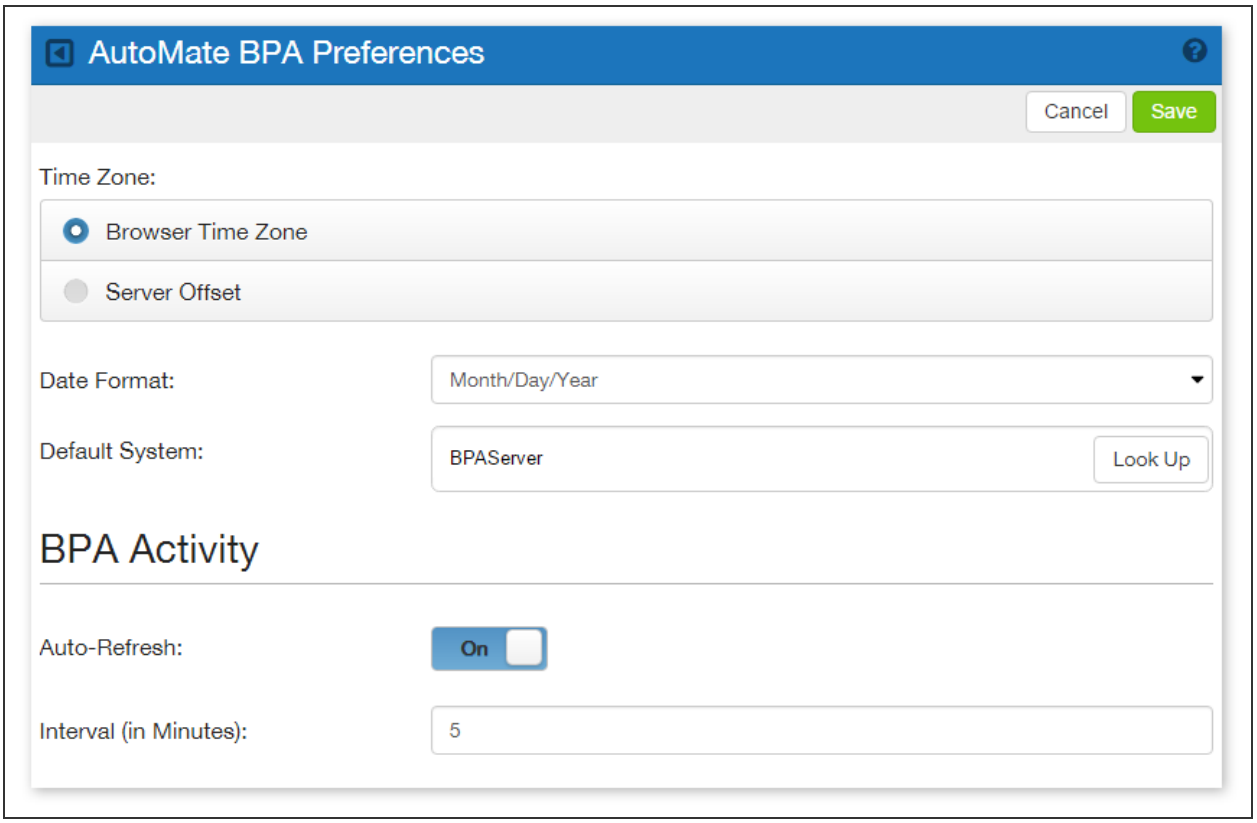
The Automate Ops Console License section displays previous and current license information and allows you to apply a new license.



Preferences

The Preferences page allows you to set default time zone, date format, and server preferences. It also allows you to indicate whether auto-refresh mode should be turned on or off by default and set the default time interval in minutes between each auto-refresh.

To access the Preferences page, click **Preferences** under the Automate menu.



Available Preferences:

Below describes available preferences:

- **Time Zone**: Specifies which time zone should be observed. The available options are:
  - **Browser Time Zone** - The client local time zone will be observed.
  - **Server Offset** - The server time zone offset will be observed, which is the difference between local time and server time. Select this option if your server time differs from your local time due to being in a different time zone.
- **Date Format**: Indicates the format that dates should be displayed by default. The available options are:
  - **Month/Day/Year**
  - **Day/Month/Year**
  - **Year/Month/Day**

- **Default Automate Enterprise**: Specifies the Automate Enterprise to identify as default in places where server selection is available, such as in the settings of each Widget. Click **Look Up** to select the Automate Enterprise you wish to set as default.
- **Auto-Refresh**: Specifies whether auto-refresh mode should be turned 

or 

by default in places where auto-refresh is available.
- **Interval (in Minutes)**: Specifies the default time interval in minutes between each auto-refresh.

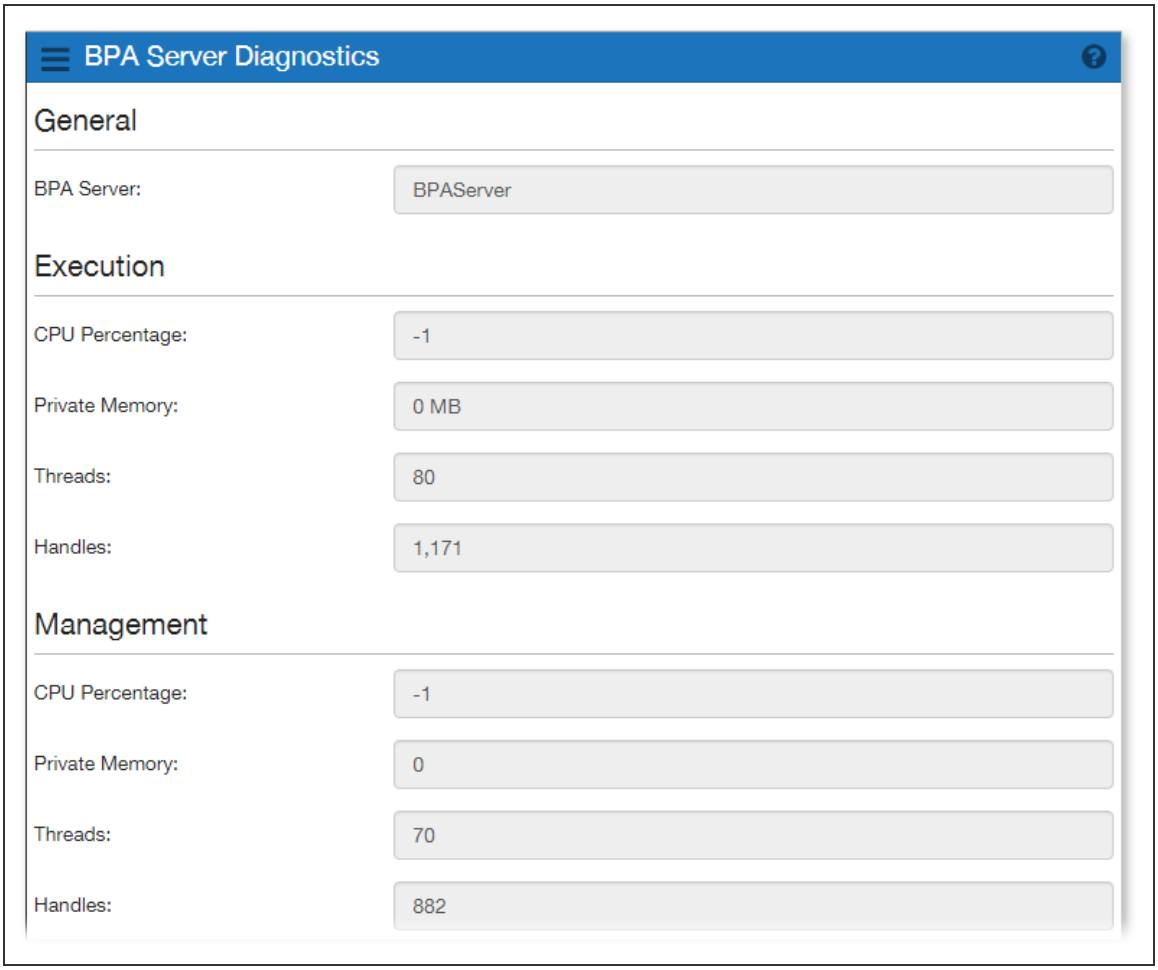
Upon completion, click **Save** to save changes.

Automate Enterprise Diagnostics

Automate Enterprise is essentially a collection of individual components that work together to act as one cohesive unit. Components such as the management server, execution server, agents and management tools communicate with each other via TCP/IP, whether remotely or on the local system. This enables you to customize installation of each component to best fit your organization's needs.

The Automate Enterprise Diagnostics page helps you evaluate and monitor the hardware performance of your Automate Enterprise environment. You can view memory and CPU usage as well as handle and thread counts consumed by your Automate Enterprise management and execution servers. The data is presented in a manner that's easy to convey and manage.

To access the Automate Diagnostics page, click **Automate Diagnostics** under the Automate menu.



General

The General section displays the default Automate Enterprise from which diagnostics data are gathered. If multiple Automate Enterprise installations exist, a default can be configured via the **Default Automate Enterprise** parameter located in the Preferences page.

Execution

The Execution section displays execution server diagnostics. The execution server is responsible for communicating information with regards to which agent should execute the proper workflow objects, and thereafter, transmits all execution statistics back to the management server. Automate Enterprise agents communicate directly with the execution server.

Management

The Management section displays management server diagnostics. The management server is responsible for storing information regarding workflow objects as well as audit and execution data. It is basically the repository off all Automate Enterprise information. The Automate Enterprise Management Console and Workflow Designer communicates directly with the management server.

Diagnostics Data

Below describes the hardware data being monitored:

- **CPU Percentage**: Displays the total CPU percentage being used by the management or execution server. The percentage refers to how much of the individual CPU's capacity is in use. CPU percentage is typically used to track CPU performance regressions or improvements when running Automate Enterprise workflows, tasks or processes.
- **Private Memory** - Displays the private memory size (in megabytes) used by the management or execution server. The private memory, also known as private working set, is the amount of "real" memory that can only be used by the process it is allocated to.
- **Threads** - Displays the number of threads being used by the execution or management server. A thread is a part of a program that can execute independently of other parts. Operating systems that support multithreading enable threaded parts of a program to execute concurrently.
- **Handles** - Displays the handle count being used by the execution or management server. A handle is an element that enables a program to access a specific resource, such as a library function.

To refresh the information, simply Click the Refresh button located at the top of the page.

Quick Start

Dashboards

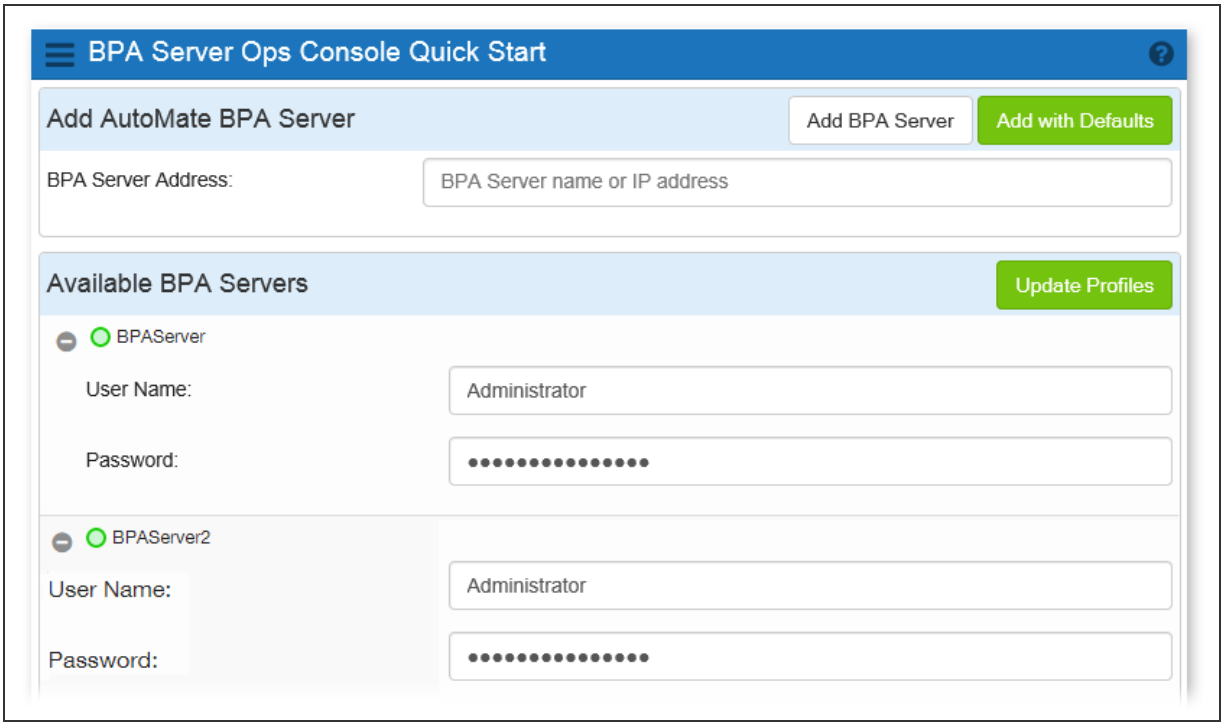
Widgets

Quick Start

Before you can use Automate Ops Console to monitor and control your Automate Enterprise resources, you must first establish a connection between the Ops Console and Automate Enterprise. The Quick Start page allows you to quickly and easily set up connections to existing Automate Enterprises or create connections to new ones. You can create guest or temporary connections which can be saved with the same properties configured for your default connection. In addition, you can update the user name and password of existing profiles.

Saved connections appear as profiles under the Available Automate Enterprises section. You can expand a profile to view or edit its user name or password.

To access the Quick Start page, click **Quick Start** under the Automate menu.



Adding Automate Enterprise Connection

You can create a connection with a whole new set of properties or create one that uses the same properties as your default Automate Enterprise set via the **Default Automate Enterprise** parameter in the Preferences page.

To create a connection with new server properties:

1. Click **Add Automate**. This displays the new connection settings.
2. Enter the following parameters:

- **Connection Type**: The type of connection to establish. From the drop-down list, you must select the option **Automate Enterprise** as the connection type.
- **Address**: The computer name or IP address of the computer where Automate Enterprise is installed.

- **Port**: The communication port to use for this connection.
- **Alias**: The display name to associate with this Automate Enterprise connection. This name will be used throughout the interface as a way to identify this connection.
- **User Name for Guest Access**: A valid user name used to log onto Automate Enterprise.
- **Password for Guest Access**: The password to authenticate the user name entered above.
- **Confirm Password**: Re-enter the password as a form of confirmation.

3. Click **Save** to save changes. The new connection will appear under the Available Automate Enterprises section.

To create a connection that uses default server properties:

1. In the **Automate Address** parameter, enter the computer name or IP address of the computer where Automate Enterprise is installed.
2. Click **Add with Defaults**. All necessary properties such as Port, Alias, User Name and Password will be retrieved from the default Automate Enterprise. The new connection will appear under the Available Automate Enterprises section.

To update an existing profile:

1. Click the Expand button associated to the profile you wish to update.
2. Enter the new user name and/or password in the appropriate fields.
3. Click the **Update Profile** to save changes.

Note: You can also create a connection or edit existing connections via the Product Connections page.

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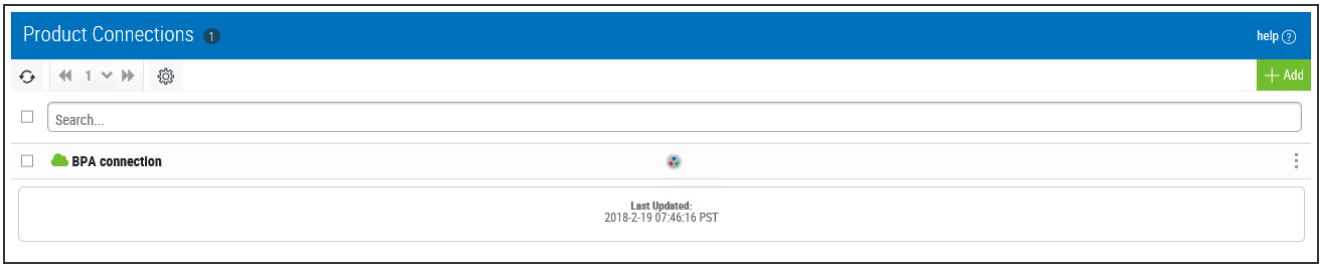
Product Connections

The Product Connections page allows you to create a new connection between Ops Console and Automate Enterprise, as well as edit or delete existing connections. For convenience, each connected system shows their installed products in the form of an icon. Hover your mouse cursor over an icon to view the name of the associated product. You can disconnect or reconnect existing connections at any time.



To access the Product Connections page, from the main menu, navigate to **Settings** -> **Product Connections**.

To set up a connection to Automate Enterprise, see Adding an Automate Enterprise Connection.

Note: You can also create a connection between the HelpSystems Web Server and Automate Enterprise via the Quick Start page.

About Ops Console

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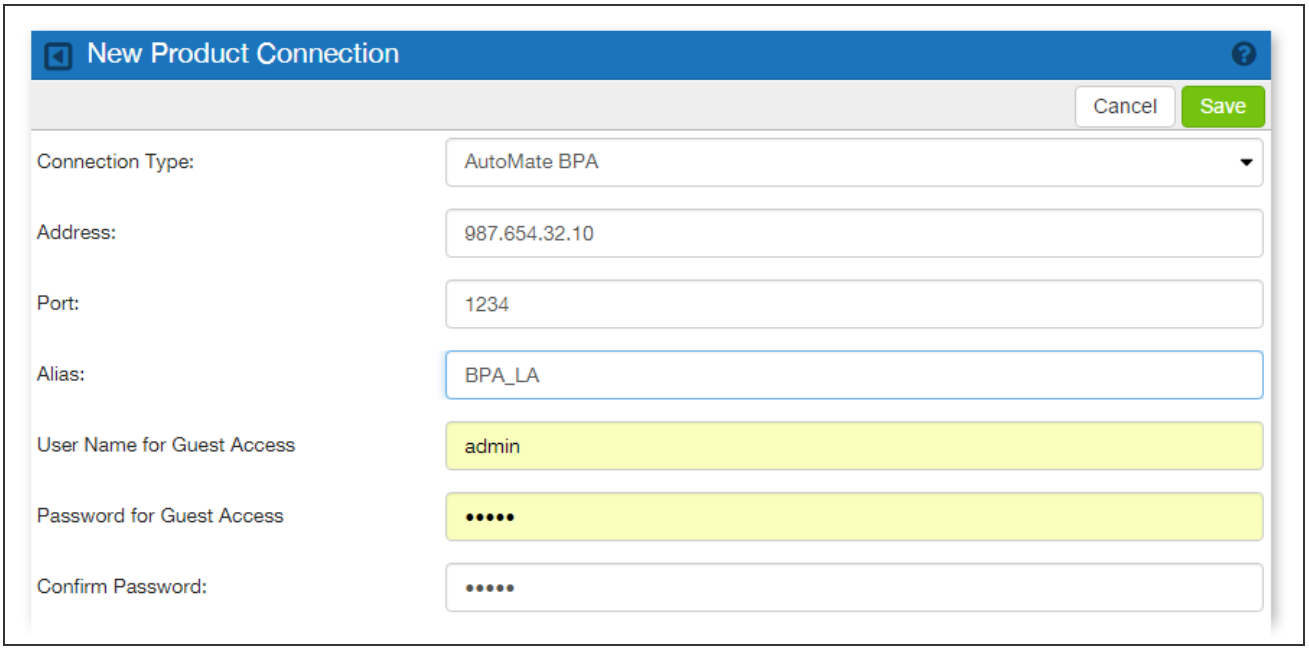
Diagnostics

Automate Enterprise Connection

Before you can begin using the Ops Console, you must first create a connection between Ops Console and your Automate Enterprise installation.



Follow these steps to define an Automate Enterprise connection:

1. From the Product Connections page, click **Add**. This opens the New Product Connection page.
2. Enter the following properties:

- **Connection Type**: The type of connection to establish. You must select the option **Automate Enterprise** as the connection type.
  - **Address**: The computer name or IP address of the computer where Automate Enterprise is installed.
  - **Port**: The communication port to use for this connection.
  - **Alias**: The display name to associate with this Automate Enterprise connection. This name will be used throughout the interface as a way to identify this connection.
  - **User Name for Guest Access**: A valid user name used to log onto Automate Enterprise.
  - **Password for Guest Access**: The password to authenticate the user name entered above.
  - **Confirm Password**: Re-enter the password as a form of confirmation.

3. Click **Save** to save your settings.

Note: You can also establish a connection between the HelpSystems Web Server and Automate Enterprise component via the Quick Start page.

Insite Dashboards

The Dashboard is a feature of the HelpSystemsInsite web browser interface. Insite can be downloaded from your User Account page on the HelpSystems website.

The HelpSystems Insite Dashboard can be used to display a visual representation of Automate Ops Console product activity. See HelpSystems Insite Dashboard Overview in the Insite for details.

A Dashboard can include any combination of *Widgets*, which are the individual visual displays of product data (e.g. charts, graphs, and so forth). See Dashboard Widgets in the Insite help for details on creating and editing Widgets. The type of Automate Ops Console data to include in a widget, such as the number of profile switches over a given time frame, is specified using Assets. See Assets for a description of the types of Automate Ops Console data that can be added to an Insite Dashboard.

You can mix widgets from different products and Data Sources (servers) on the same Dashboard. You can create as many Dashboards as you like.

Dashboards are specific to the profile you used to log on. However, you can share them with everyone or keep them private, as needed. Users logging on with the guest profile can view only those dashboards marked as Guest. For more on the guest profile, see Authentication.

Assets

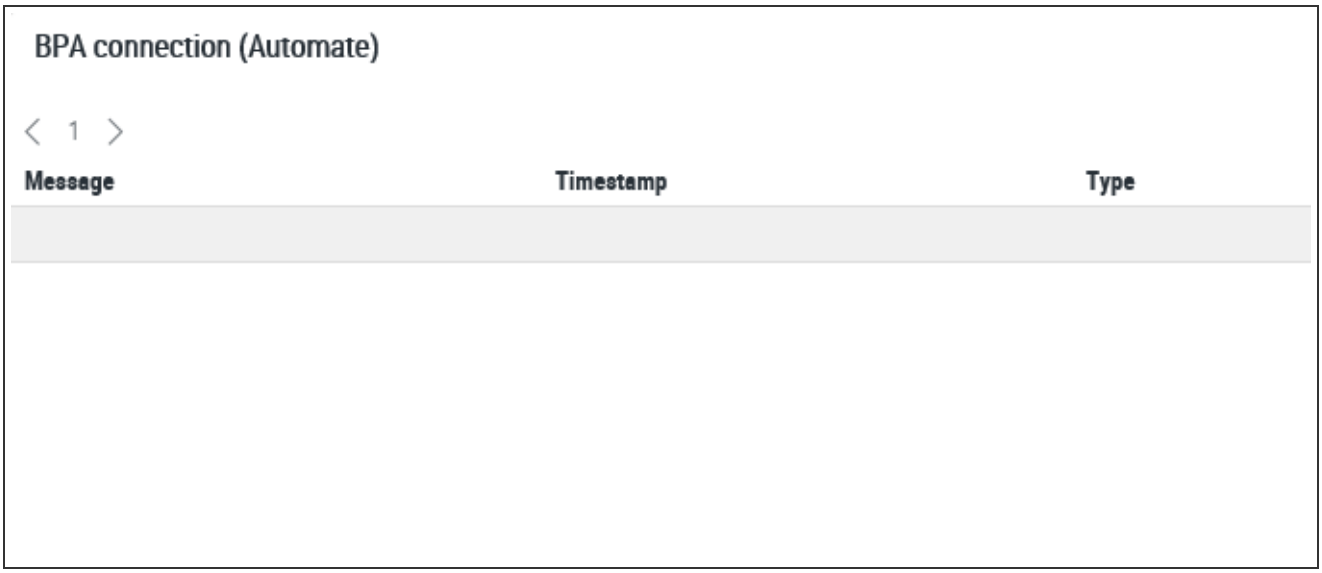
Assets represent the type of Automate Ops Console data for which you can generate a visual representation within an Insite Dashboard, via a Widget. See HelpSystems Insite Dashboard Overview for details.

While defining Dashboard Widgets in Insite, once a Data Source has been selected, you can then select the Asset that the Widget will represent. Only the Assets from the selected Data Source are available. If the required Asset is not displayed, it must first be created in the Data Source before it is available within Insite. See Assets in the Insite help for more details.

Automate Ops Console Assets

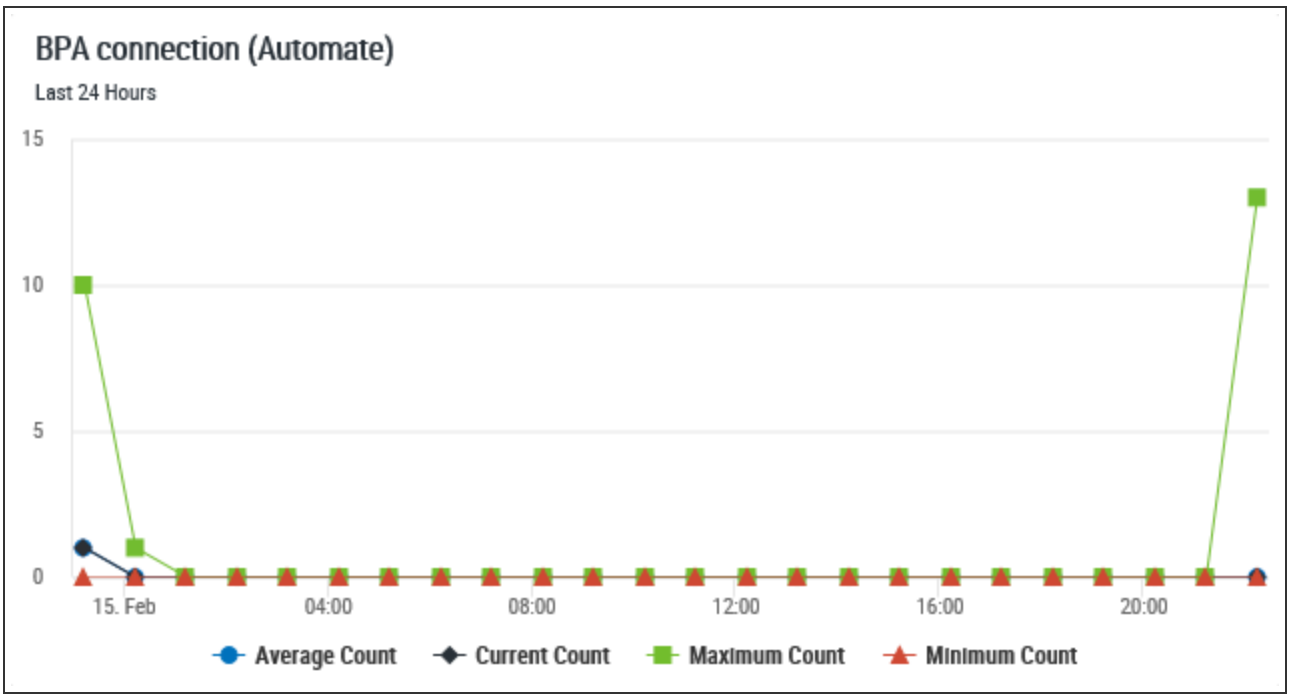
Output

The Output widget displays output messages regarding events that occurred within the specified server or within a particular agent that resides in that server. If an error occurs, this widget displays extended information about the error in red so users can easily detect and classify them.



Run Statistics

The Run Statistics widget uses a line graph to track changes in run statistics over a period of time. The time range to display can be modified from minutes to days. Also, run statistics can be filtered to a specific object.



Completed Statistics

The Completed Statistics widget displays success/failure statistics of completed workflows, tasks, and processes presented in the form of an interactive line chart. It can be used to examine the outcome of a collection of completed execution events performed over a period of time in order to detect trends, patterns, or cycles.

BPA connection (Automate)

Last 24 Hours

1

End Interval	Failed	Start Interval	Success
2018-02-14 15:11:30	3	2018-02-14 14:11:30	15
2018-02-14 16:11:30	0	2018-02-14 15:11:30	1
2018-02-14 17:11:30	0	2018-02-14 16:11:30	0
2018-02-14 18:11:30	0	2018-02-14 17:11:30	0
2018-02-14 19:11:30	0	2018-02-14 18:11:30	0
2018-02-14 20:11:30	0	2018-02-14 19:11:30	0

Queued Statistics

The Queued Statistics widget allows you to track the history of queued workflow events over a specific period of time in order to troubleshoot issues or manage workloads. The time range to display can be modified from minutes to days.

BPA connection (Automate)

Last 24 Hours

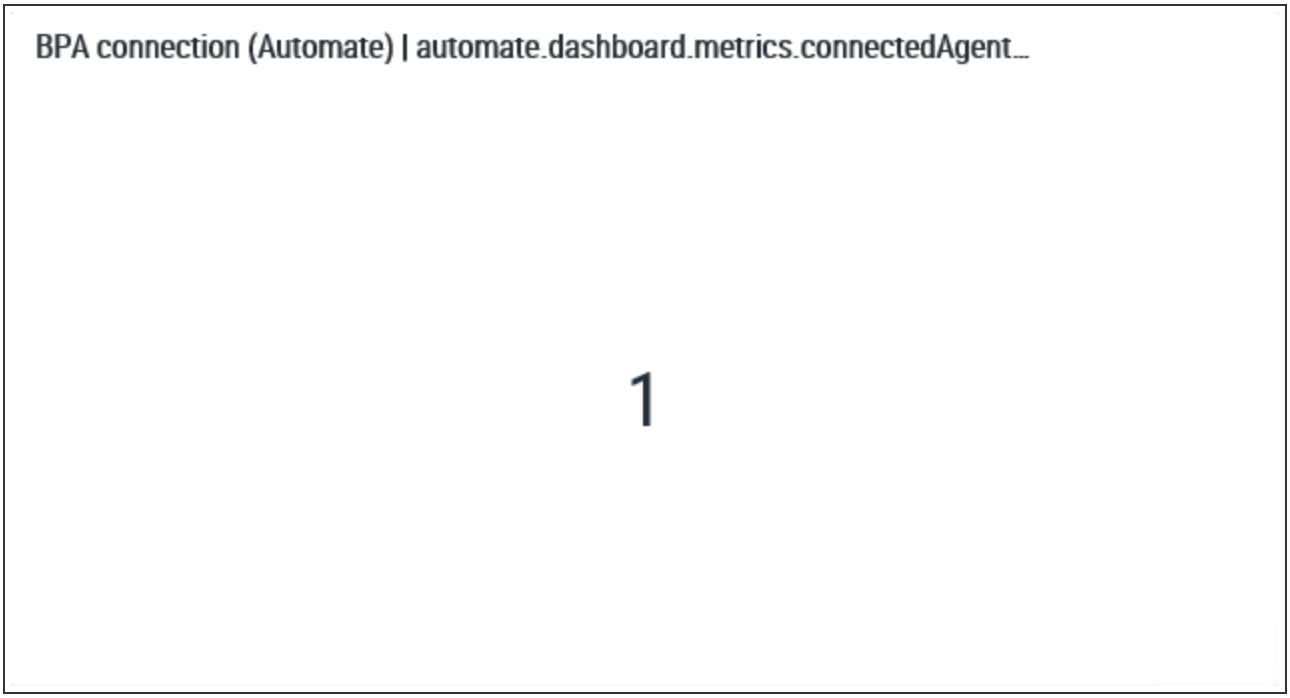
1

Average Count	Current Count	Maximum Count	Minimum Count
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0

Server Status

The Server Status widget displays important statistics about your automation environment, including number of connected agents, queued workflows, active instances, and global triggering status. It also keeps track of lifetime statistics, which is the total number of workflows, tasks and processes that ran since the start

of the Automate service until present.



Upcoming

The Upcoming widget displays the scheduled start date/time of workflows that are set to run in the future with the use of a Schedule trigger. You can sort the list by name or start time and filter records based on a specific time range.

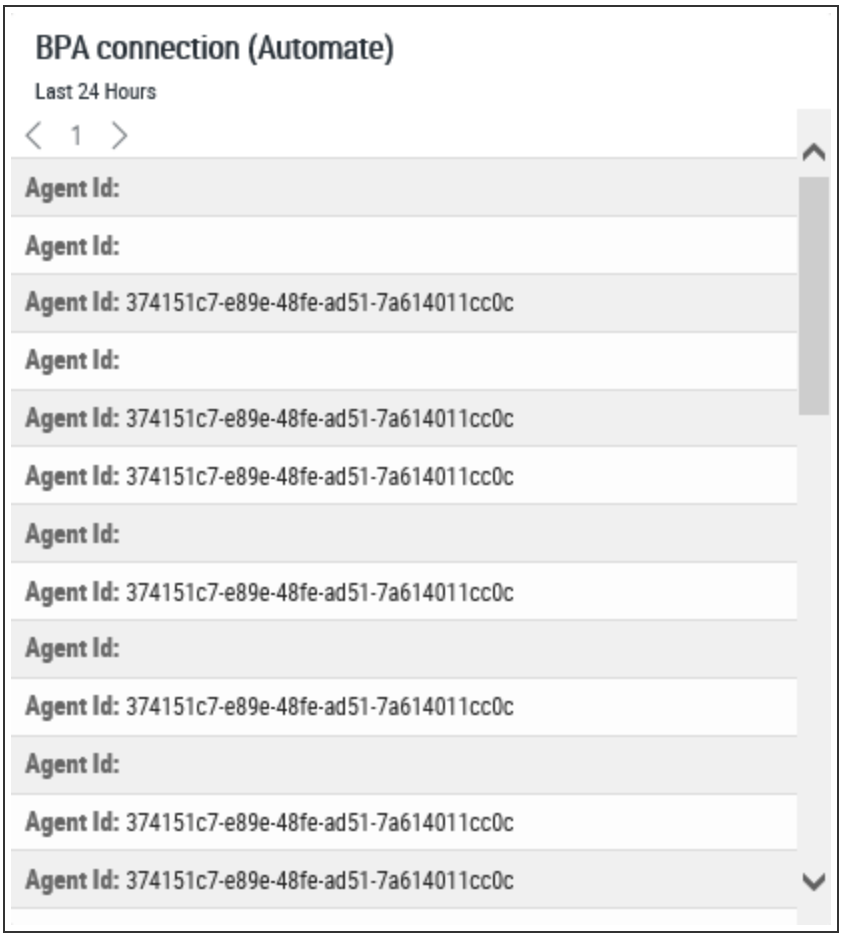
BPA connection (Automate)

1

Construct Id	Next Run Time	Schedule Id	Schedul Name	Schedule Path	Schedule Type	Workflow Id	Workflo Name
	2018-02-15 15:00:00	{505d59bb-473a-4609-b93f-cab360e44993}	Run on the hour	\CONDITIONS	Hours	{f16809ec-4cec-4b7a-b506-306efc30279c}	Run on the hour
	2018-02-15 16:00:00	{505d59bb-473a-4609-b93f-cab360e44993}	Run on the hour	\CONDITIONS	Hours	{f16809ec-4cec-4b7a-b506-306efc30279c}	Run on the hour
	2018-02-15 17:00:00	{505d59bb-473a-4609-b93f-cab360e44993}	Run on the hour	\CONDITIONS	Hours	{f16809ec-4cec-4b7a-b506-306efc30279c}	Run on the hour
	2018-02-15 18:00:00	{d59e1367-6629-445a-83e8-1463d5987c70}	Run every 6 hours	\CONDITIONS	Hours	{ef1ff565-8aec-4b3b-8970-ed626a4b1093}	Run every 6 hours
	2018-02-15 18:00:00	{505d59bb-473a-4609-b93f-cab360e44993}	Run on the hour	\CONDITIONS	Hours	{f16809ec-4cec-4b7a-b506-306efc30279c}	Run on the hour
	2018-02-15 19:00:00	{505d59bb-473a-4609-b93f-cab360e44993}	Run on the hour	\CONDITIONS	Hours	{f16809ec-4cec-4b7a-b506-306efc30279c}	Run on the hour

History

The History widget shows information about previously run workflows, tasks and processes. This data is identical to what appears in the Recent Activity page of a workflow, task, or process but conveniently displayed in a dashboard widget. You can sort and filter the data much like the Recent Activity page as well.



Active

The Active widget displays information about active (currently running) instances of workflows, tasks and processes, including queued workflows. This data is identical to what appears in the Active Instances page, but conveniently displayed in a dashboard widget.

BPA connection (Automate)

Last 24 Hours

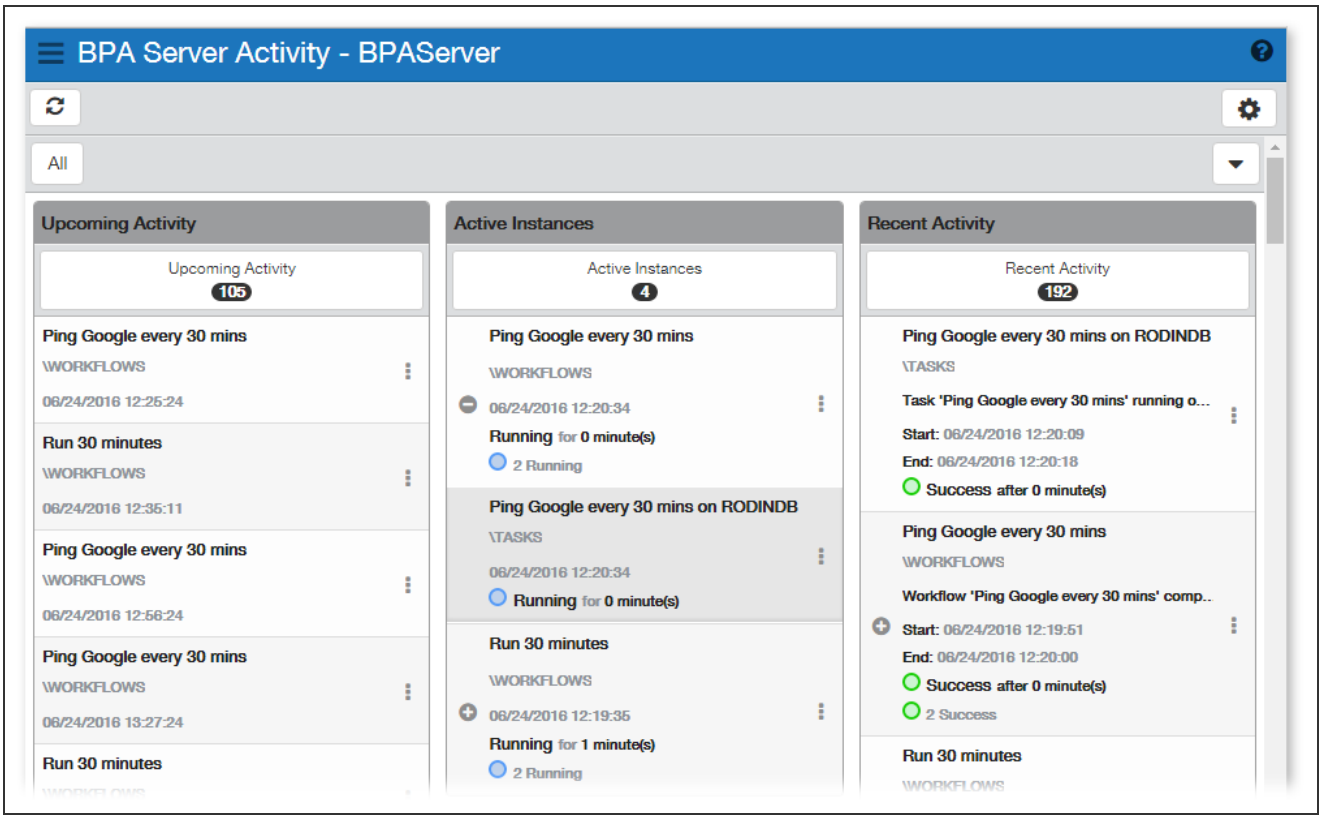
< 1 >

Agent	Workflow Instance Id	Type	Agent Id	Agent Path	Construct Id	Duration (Minutes	End Date	Status	Transaction Id
VMW2K12R2X64F		Task	374151c7-e89e-48fe-ad51-7a614011cc0c	\TASKAGENTS	{939de57a-24d5-49e0-9d82-2e0d427b987a}	1,386	2018-02-14 14:29:31	Running	0f049a37-9eb1-4d75-a325-8661047a2c61
VMW2K12R2X64F		Task	374151c7-e89e-48fe-ad51-7a614011cc0c	\TASKAGENTS	{c07d5c84-6033-4fbf-ae4d-abb61ef6391b}	1,386	2018-02-14 14:29:26	Running	89de11b8-3c87-4c0e-87ef-0a01c35c8725
VMW2K12R2X64F		Task	374151c7-e89e-48fe-ad51-7a614011cc0c	\TASKAGENTS	{365ac368-0fcc-410e-b892-c878113dc3aa}	1,387	2018-02-14 14:29:08	Running	0ad15995-7a03-4ff5-911b-66ee937203eb

Automate Activity

The Automate Enterprise Activity page provides a visual reference of past, present, and future automation activities. It can be used to forecast upcoming scheduled workflow activities, track progress of active instances to determine whether they are running as expected, and monitor historical performance statistics of recent activities.

To view the Automate Enterprise Activity page, click **Automate Enterprise Activity** under the Automate Ops Console menu.



Automate Activity Types

The Automate Activity page is divided into three sections, each displaying information about a particular type of activity. For more details on a particular section, click the provided link.

- **Upcoming Activity**: Provides information about workflows that contain a Schedule condition set to trigger execution at a future date/time. For more details, see Upcoming Activity.
- **Active Instances**: Displays the automation objects that are currently running or waiting to run. For more details, see Active Instances.
- **Recent Activity**: Displays information about recently executed automation objects and their completion status. For more details, see Recent Activity.

Things to know and do

- The total number of records for each type of activity (up to 10,000 records total) are listed at the top of each section.

- To expand a section and view more details about a specific list, click the area at the top of the section that displays the total records.
- By default, activity information of all workflows, tasks and processes are displayed. Click the drop-down button to drill further down the hierarchy of records, for example, to display activity of only tasks or processes.
- Click the Show Actions button by any entry to view available actions for managing or monitoring it. Actions vary depending on which section the record comes from (i.e., Upcoming Activity, Active Instances, or Recent Activity).
- In the Active Instances or Recent Activity section, click the Expand Workflow button to view details about currently active or recently ran objects within that workflow.
- Click the Refresh button to refresh the information in the display. Or, you can set up an auto-refresh in the Preferences.

Sorting Automate Enterprise Activity

Click the button in the Automate Enterprise Activity page to indicate how the list of records should be displayed.

To sort the list, click the Settings button to access sort preferences. The available options are:

Sort By: Sorts the list of instances in ascending or descending order based on the following criteria:

- **Name** - Sorts records based on object name.
- **Start Time** - Sorts records based on execution start date/time.
- **Default** - Uses the default sort option which sorts records based on object name.

Agents

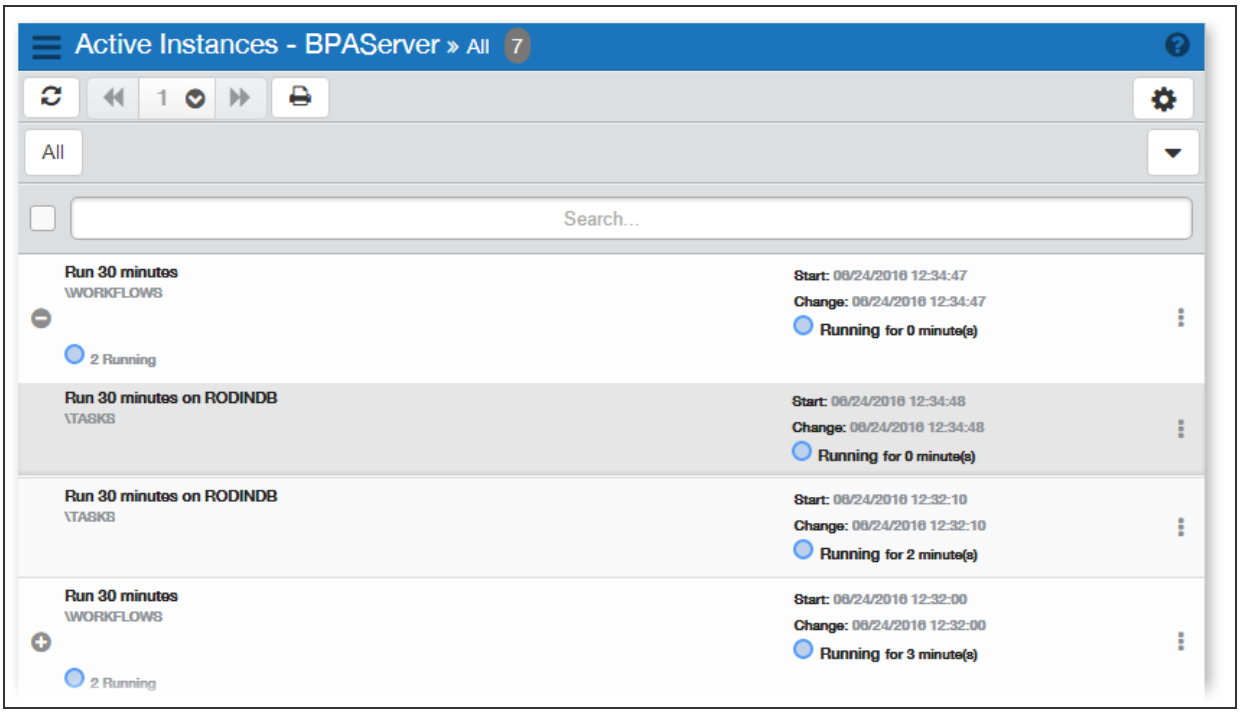
Tasks

Processes

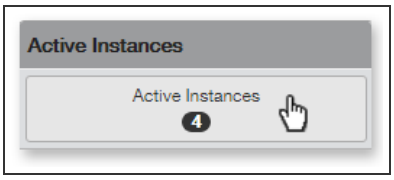
Workflows

Active Instances

The Active Instances page displays automation objects that are currently running or queued. You can view workflows, tasks, and processes that are in a running state and determine which workflows are placed in a queue of waiting workflows based on their priority.

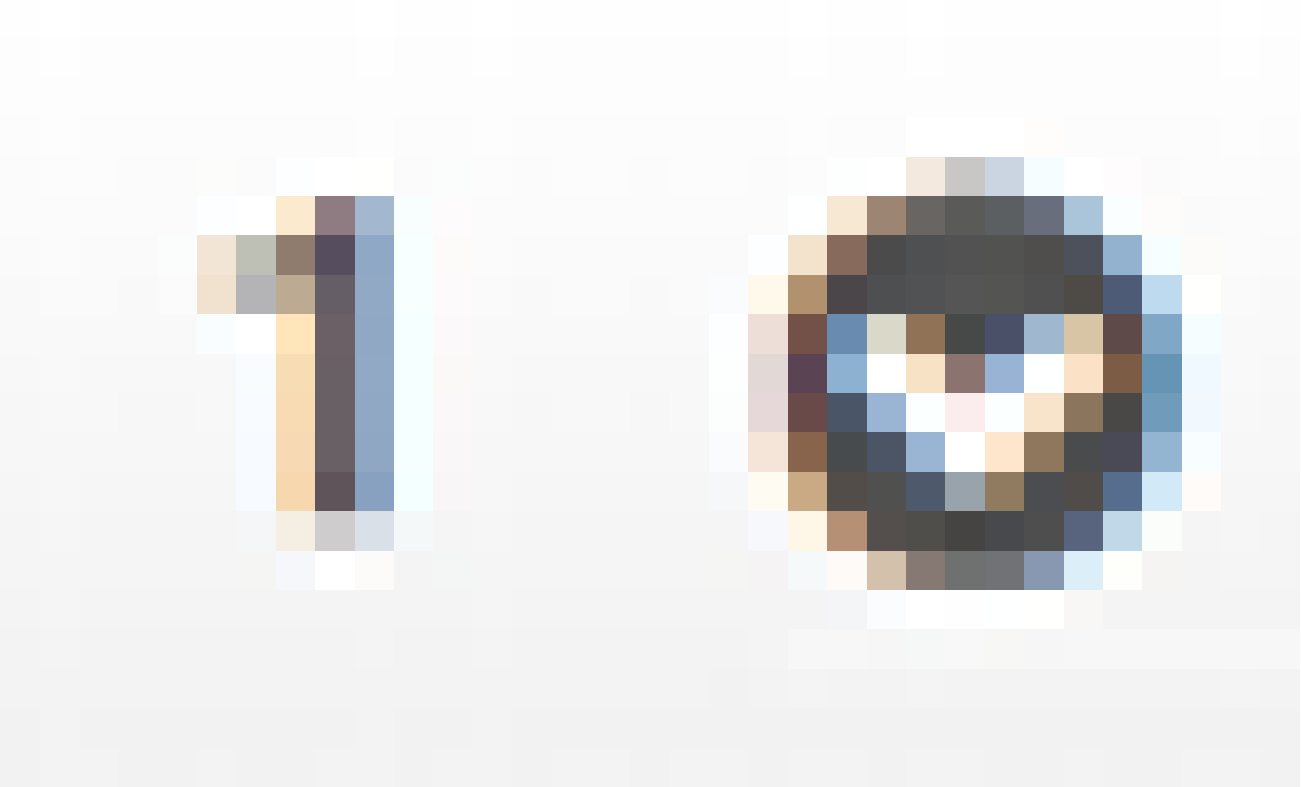


To view the Active Instances page, click **Automate Enterprise Activity** under the Automate Enterprise menu to open the Automate Enterprise Activity page. Then, click the area at the top of the Active Instances list that displays total records.



Things to know and do:

- The filter applied and total number of active instances appear in the title bar.
- Click the expand button to display active tasks or processes contained in the workflow.
- Click the Refresh button to refresh the information in the display.
- If records span to multiple pages, click the page number drop-down button



to jump to a specific page. Or, click the next or previous arrow to navigate to the next/previous page.

- Click the Print button to view the active instances in HTML format. You can then select all the records (**Ctrl+A**) and copy it (**Ctrl+C**) to paste it into a spreadsheet. **Note:** You may have to disable pop-up blockers in your browser to view the list.
- Use the Search dialog to enter all or part of a key word associated to active instances and view only those instances with key words that contain matching text. Found instances may be dependent on the search filter applied. See Sorting and Filtering Active Instances for more details.

Actions to perform:

Click the Show Actions button located at the very right of an active instance to display options for monitoring and managing it.

Actions vary depending on whether the active instance is a workflow, task or process. They are as follows:

- **Enable/Disable** - Disables the active object or enables a disabled object. The **Enable** and **Disable** option alternates depending on the current state of the selected object.
- **Stop** - Immediately stops execution of the active workflow or task (does not pertain to processes). **Note**: Stopping a workflow that is currently running a process does not stop the active process.
- **Pause/Resume from Pause** - Suspends execution of the active workflow or task or resumes execution of a paused workflow/task (does not pertain to processes). The **Pause** and **Resume from Pause** option alternates depending on the current state of the selected workflow/task.
- **History** - Displays execution history of the active object.
- **Where Used** - Displays all workflows that use the active object.
- **Close** - Closes the actions list pop-up window.

Workflows

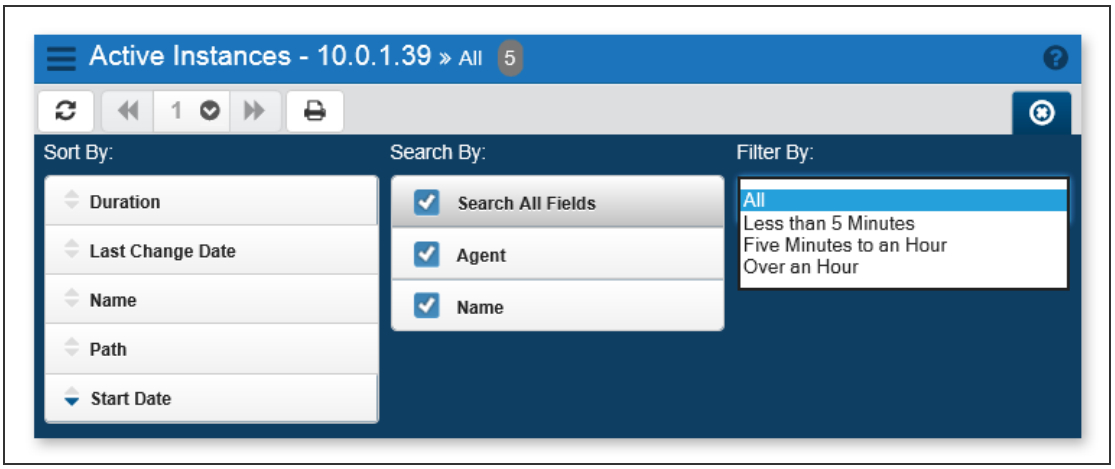
Processes

Agents

Tasks

Sorting & Filtering Active Instances

To make the Active Instances page easier to work with, you can display the list of records in a particular order and view only those records that meet a specific criteria or match a certain keyword. Use the **Sort By** and **Filter By** features to sift through your data and display only the records you require, arranged in the order you want to view it. Use the **Search By** feature to further narrow your search by indicating precisely which fields to search from when performing a text search.



Click the Settings button to access sort, search and filter preferences.

Sort By: Sorts the list of instances in ascending or descending order based on the following criteria:

- **Duration** - Sorts instances based on runtime duration.
- **Last Change Date** - Sorts instances based on the last modified date.
- **Name** - Sorts instances based on object name.
- **Path** - Sorts instances based on their repository path.
- **Start Date** - Sorts instances based on execution start date/time.

Search By: Specifies which field(s) will be searched when entering a keyword in the **Search Text** dialog. The available options are:

- **Search All Fields**- The search quarry will include all fields.
- **Agent** - The search quarry will include agents.
- **Name** - The search quarry will include object names.

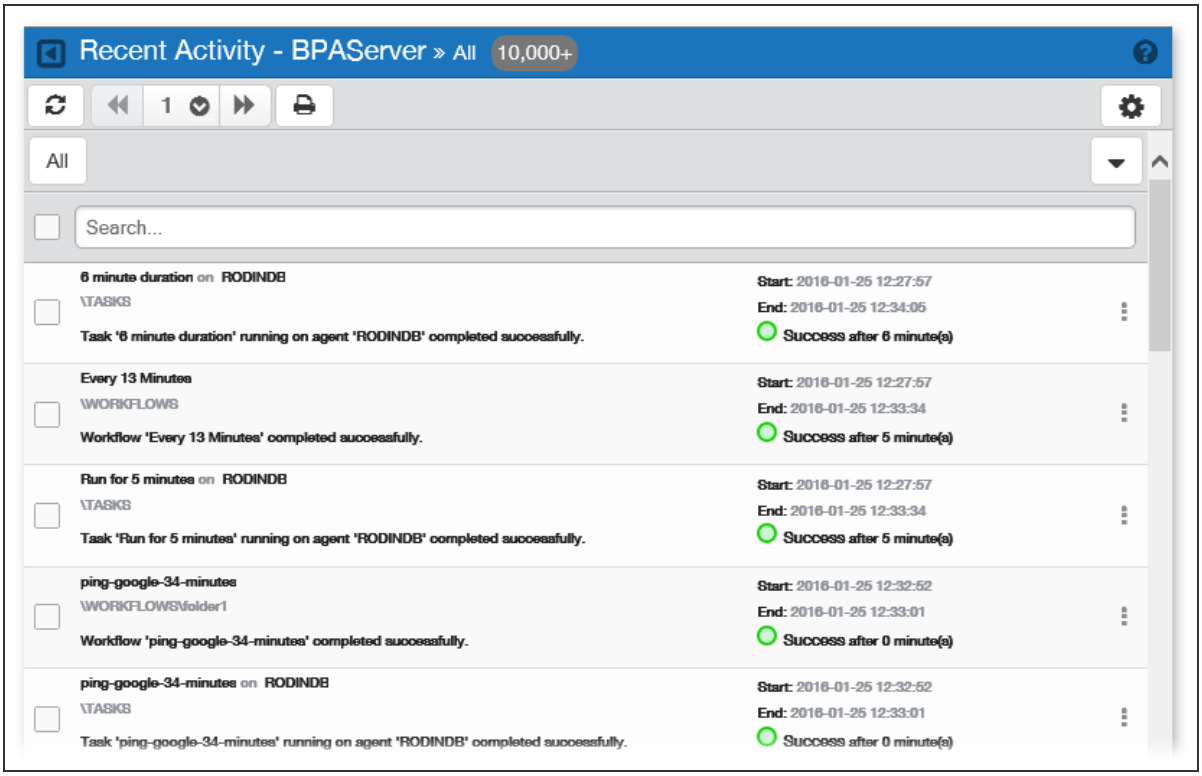
Filter By: Narrows the list of records based on the selected start time. The available options are:

- **All** - All active instances will be shown regardless of start time.
- **Less than 5 Minutes** - Only active instances that started within the last 5 minutes will be shown.
- **Five Minutes to an Hour** - Only active instances that started between the last 5 minutes to an hour will be shown.
- **Over an Hour** - Only active instances that started over an hour ago will be shown.

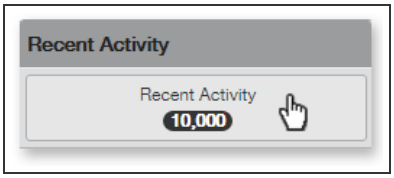
Click the Settings button to save and close the settings.

Recent Activity

The Recent Activity page displays a history of automation objects that previously ran. From here, you can view recent executions of workflows, tasks and processes, when they started and ended, and whether they ran successfully or failed. The page can be filtered in various ways so that only data that matches the selected pattern is shown, giving you more control over which activities should appear. Click the **Recent Activity** section at the top of the pane to access the Recent Activity page.

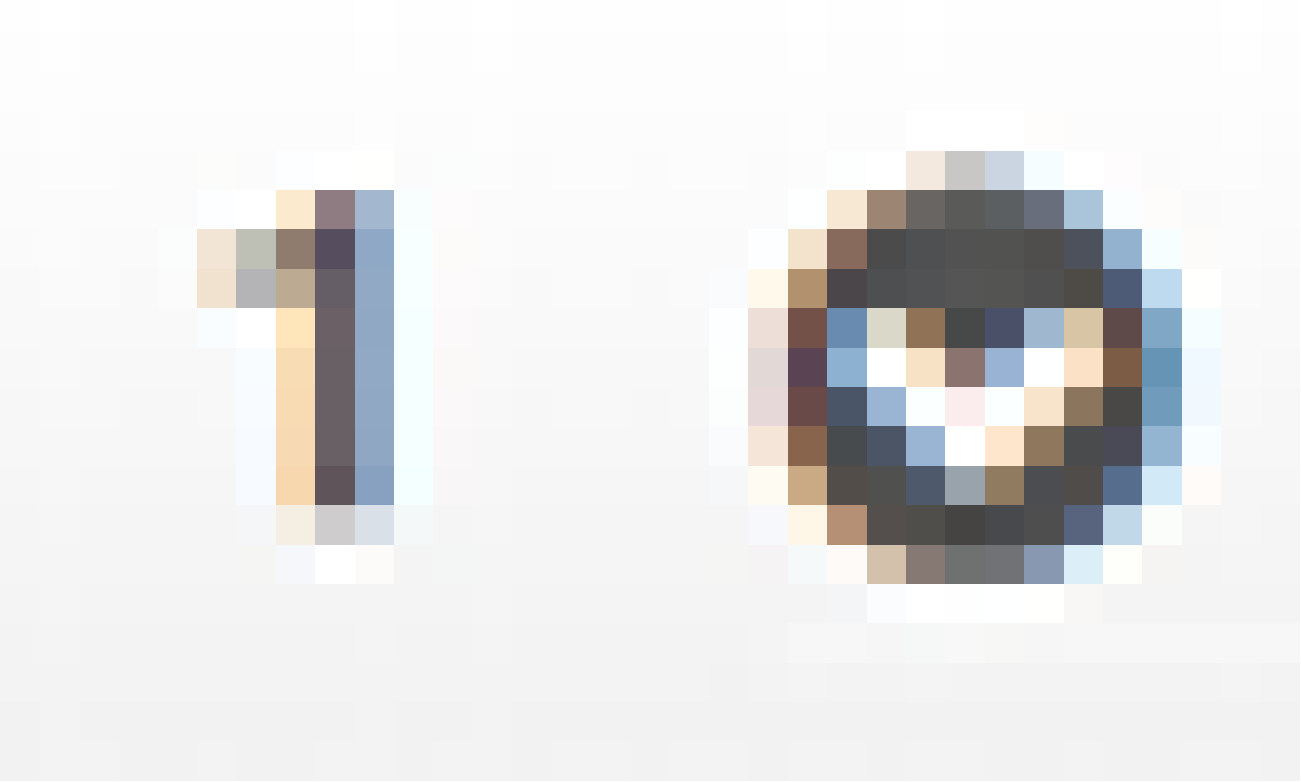


To view the Recent Activity page, click **Automate Enterprise Activity** under the Automate Enterprise menu to open the Automate Enterprise Activity page. Then, click the area at the top of the Recent Activity list that displays total records.



Things to know and do:

- The filter applied and total number of activities appear in the title bar.
- Each activity's completion status is color coded for clarity (Success = , Failed =).
- If viewing recent workflow activities, click the expand button to display the objects that ran during execution of the workflow. Click the collapse button to hide the objects.
- Click the Refresh button to refresh the information in the display.
- If records span to multiple pages, click the page number drop-down button



to jump to a specific page. Or, click the next or previous arrow to navigate to the next/previous page.

- Click the Print button to view the recent activity list in HTML format. You can then select all the records (**Ctrl+A**) and copy it (**Ctrl+C**) to paste it into a spreadsheet. **Note:** You may have to disable pop-up blockers in your browser to view the list.
- Use the Search dialog to enter all or part of a key word associated to recent activity and view only those with key words that contain matching text. Found activities may be dependent on the search filter applied. See Sorting and Filtering Recent Activity for more details.

Actions to perform:

Click the Show Actions button located at the very right of a recent activity record to display actions for monitoring and managing it. Available actions vary depending on the type of object.

The following actions are available:

- **Disable/Enable**: Disables automatic execution of the object or enables a currently disabled object.
- **Run in Same Agent**: Immediately runs the task or process on the same agent from where it previously ran (does not pertain to workflows).

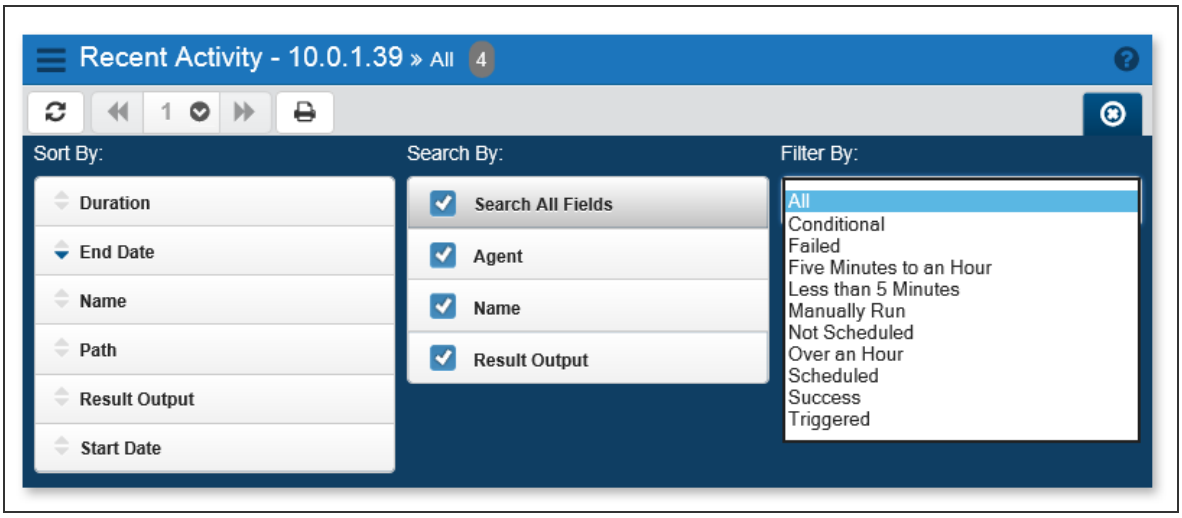
- **Run Now**: Immediately starts a workflow. If the object is a task or process, a window will appear displaying available agents to run the object from.
- **History**: Displays execution history of the object associated to the recent activity record.
- **Where Used**: Displays the workflows that the object is currently used in.
- **Close**: Closes the actions list pop-up window.

Active Instances

Upcoming Activity

Sorting & Filtering Recent Activity

To make the Recent Activity page easier to work with, you may want to display the list of records in a particular order and view only those records that meet the criteria or match a keyword. You can use the **Sort By** and **Filter By** features to sift through your data and display only the records you require, arranged in the order you want to view it. Additionally, when performing a text search, you can use the **Search By** feature to further narrow your search by indicating precisely which fields to search from.



Click the Settings button to access sort, search and filter preferences.

Sort By: Sorts the list of records in ascending or descending order based on the following criteria:

- **Duration** - Sorts the list based on runtime duration.
- **End Date**- Sorts the list based on run completion date/time.
- **Name** - Sorts the list based on object name.
- **Path** - Sorts the list based on the repository path to the object.
- **Result Output** - Sorts the list based on completion result.
- **Start Date** - Sorts the list based on run start date/time.

Search By: Specifies which field(s) to search for matching text when entering a keyword in the Search dialog. The available options are:

- **Search All Fields** - All available fields will be searched for matching text.
- **Agents** - Agents will be searched for matching text.
- **Name** - The object name will be searched for matching text.
- **Result Output** - The result output will be searched for matching text.

Filter By: Narrows the list of records to display based on the following criteria:

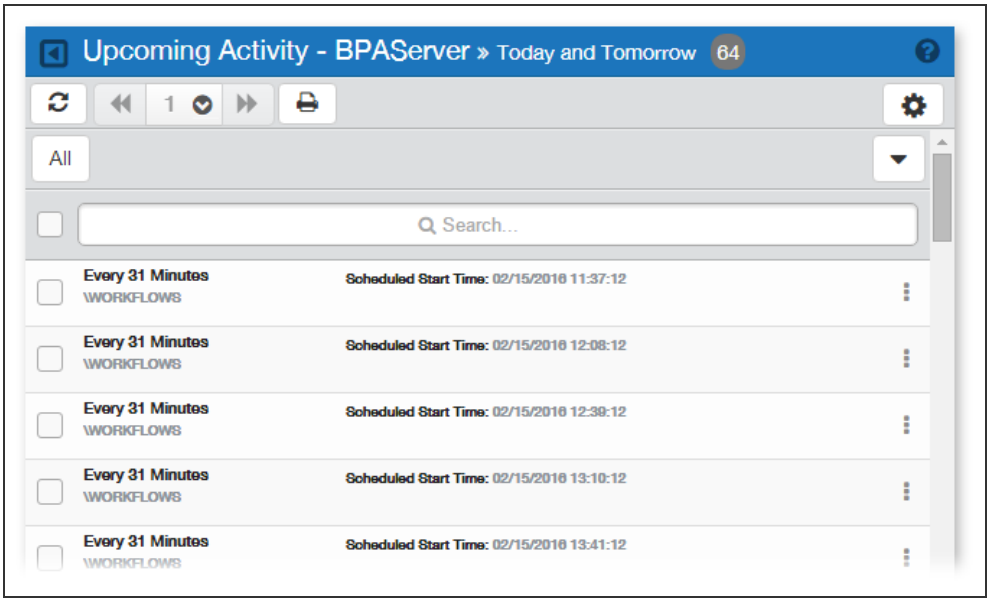
- **All** - All records will be shown.
- **Conditional** - Only conditional instances will be shown.
- **Failed** - Only failed instances will be shown.
- **Five Minutes to an Hour** - Only instances that ran between 5 minutes to an hour will be shown.
- **Less than 5 Minutes** - Only instances that ran less than 5 minutes ago will be shown.
- **Manually Run** - Only instances that were run manually will be shown.
- **Not Scheduled**- Only instances that were not triggered by a Schedule trigger will be shown.
- **Over an Hour** - Only instances that ran over an hour ago will be shown.
- **Success** - Only successful instances will be shown.
- **Triggered** - Only instances that were started by a trigger will be shown.

Click the Settings button to save and close the settings.

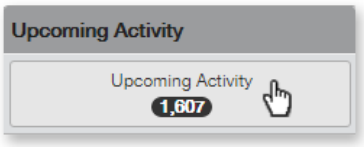
Active Instances

Upcoming Activity

The Upcoming Activity page displays the workflows that are scheduled to run in the future via a Schedule trigger. You can preview which workflows are scheduled and when they are supposed to run in order to determine any conflicts or arrange downtime and maintenance periods.

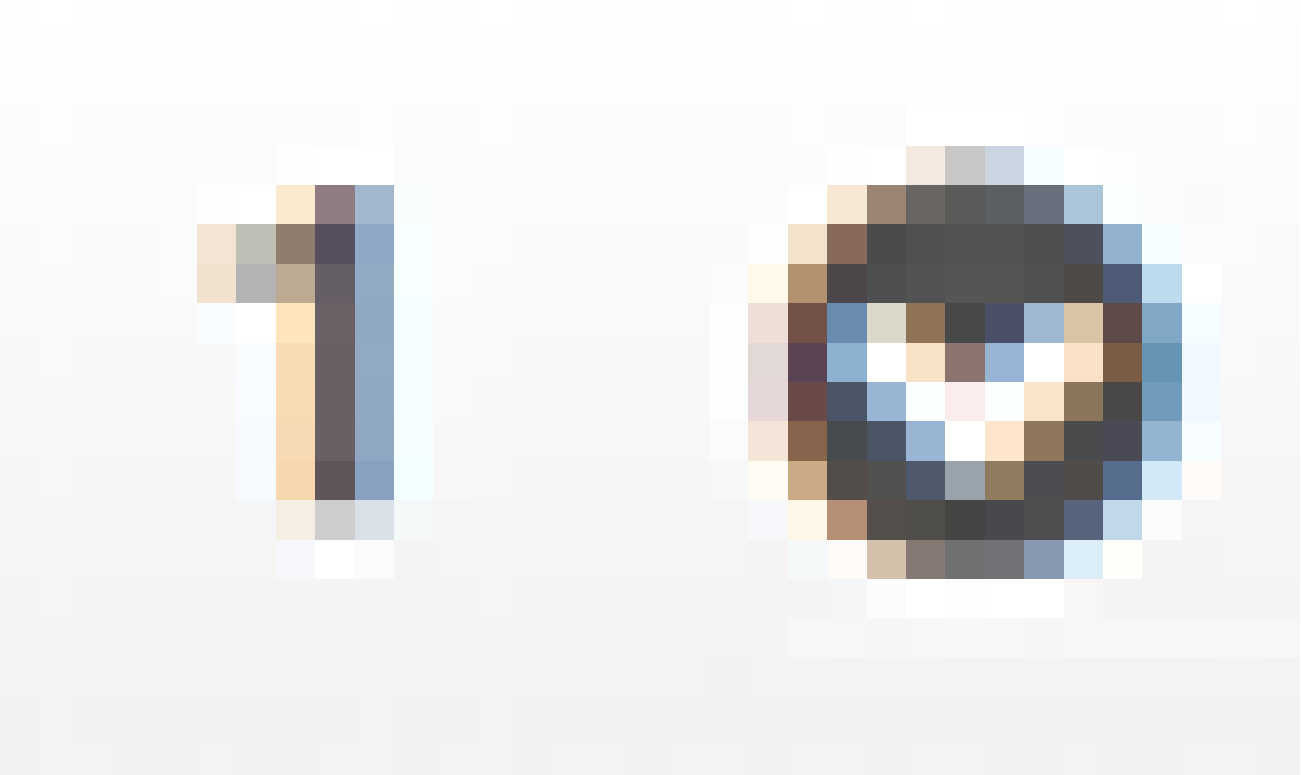


To view the Upcoming Activity page, click **Automate Enterprise Activity** under the Automate Enterprise menu to open the Automate Enterprise Activity page. Then, click the area at the top of the Upcoming Activity list that displays total records.



Things to know and do:

- The filter applied and total number of upcoming activities appear in the title bar.
- By default, future activity of all existing workflows are displayed. To display future activity of only those workflows that belong to a specific folder or sub-folder, click the drop-down button and navigate to the desired folder.
- Click the Refresh button to refresh the information in the display.
- If records span to multiple pages, click the page number drop-down button



to jump to a specific page. Or, click the next or previous arrow to navigate to the next/previous page.

- Click the Print button to view the upcoming activity list in HTML format. You can then select all the records (**Ctrl+A**) and copy it (**Ctrl+C**) to paste it into a spreadsheet. **Note:** You may have to disable pop-up blockers in your browser to view the list.
- Use the Search dialog to enter all or part of a key word associated to an upcoming activity and view only those activities with key words that contain matching text. Found activities may be dependent on the search filter applied. See Sorting and Filtering Upcoming Activity for more details.

Actions to perform:

Click the Show Actions button located at the very right of an upcoming activity record to display options for monitoring and managing it.

The following actions will appear:

- **Disable/Enable**: Disables the workflow from being automatically launched by a trigger or enables a currently disabled workflow. A Disabled icon is positioned next to the name of a disabled workflow. The option **Disable** or **Enable** alternates based on the current condition of the workflow.
- **Run Now**: Immediately starts the workflow.
- **History**: Displays a history of previous executions of the workflow.
- **Where Used**: Displays the parent workflows that this workflow is used in.
- **Close**: Closes the actions list pop-up window.

Sorting & Filtering Upcoming Activity

To make the Upcoming Activity page easier to work with, you can display the list of records in a particular order and view only those records that meet a specific criteria or match a specific keyword. Use the **Sort By** and **Filter By** features to sift through your data and display only the records you require, arranged in the order you want to view it. Additionally, when performing a text search, use the **Search By** feature to further narrow your search by indicating precisely which fields to search from.

Click the Settings button to access sort, search and filter preferences.

Sort By: Sorts the list in ascending or descending order based on the following criteria:

- **Name** - Sorts the list based on workflow name.
- **Scheduled Start Time** - Sorts the list based on the scheduled start date/time of a workflow.

Search By: Specifies which fields will be searched when entering a keyword in the **Search Text** dialog. Search results will include any records that contains matching text within the following field(s) selected:

- **Search All Fields** - All fields will be searched for matching text.
- **Name** - The workflow's name will be searched for matching text.
- **Path** - The workflow's repository path will be searched for matching text.

Filter By: Further narrows the records to display based on a time period. The available options are:

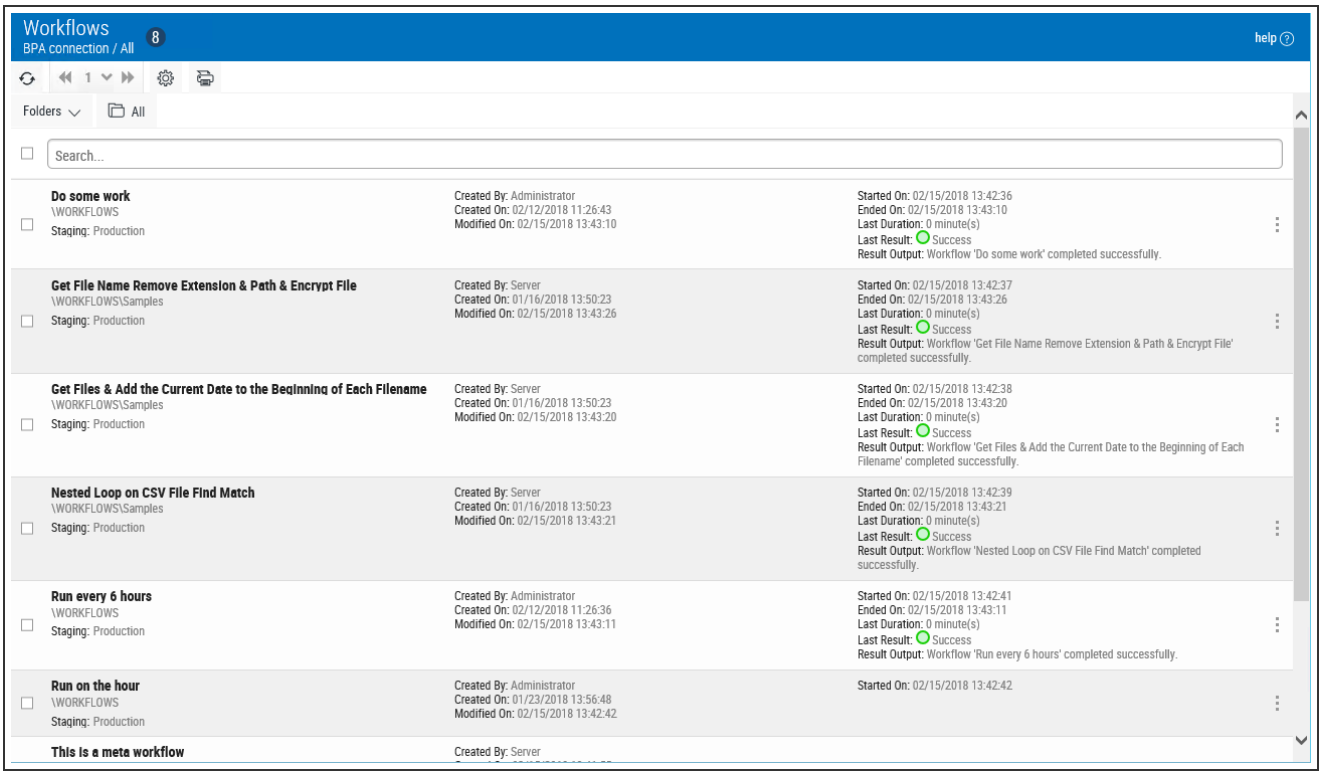
- **Next 30 Days** - Only workflow instances scheduled to run within the next 30 days will be shown.
- **Next 7 Days** - Only workflow instances scheduled to run within the next 7 days will be shown.
- **Today and Tomorrow** - Only workflow instances scheduled to run today and tomorrow will be shown.
- **Today's** - Only workflow instances scheduled to run today (before midnight) will be shown.
- **Tomorrow's** - Only workflow instances scheduled to run tomorrow will be shown.

Click the Settings button to save and close the settings.

Workflows

The Workflows page displays various attributes about the workflows contained in your repository. It is useful for viewing important workflow details, such as name, repository location, creation date, last modified date, last run date and result of last run. You can sort the list of workflows based on a specific attribute or apply filters to narrow the list based on certain qualifying criteria. The Workflows page also contains preferences for managing and monitoring workflows, such as the option to disable, enable or immediately run one or more workflows.

To access the Workflows page, click **Workflows** under the Automate Enterprise menu.



Things to know and do

- The total number of records appear in the title bar. This number may be dependent on any filter applied. For more details, see Sorting and Filtering the Workflows Display.
- Click the Refresh button to refresh the information in the display.

- If records span multiple pages, click the next or previous arrow to navigate to the next/previous page. To jump directly to a specific page, click the page number down arrow

and select the desired page from the drop-down list.

- Click the print button to view the list in HTML format. You can then enter (**Ctrl+A**) to select all records, (**Ctrl+C**) to perform a copy, and paste the data into any spreadsheet. **Note:** You may have to disable pop-up blockers in your browser to view the list.
- To display only certain workflows that belong to a specific folder or sub-folder, click the down arrow and drill down to the desired folder.
- Use the **Search...** dialog to enter all or part of a keyword associated to a workflow and view only those records with keywords that contain matching text. Found workflows may be dependent on any search filter applied. For more details, see Sorting and Filtering the Workflows Display.

Actions to perform on individual workflows

Click the Show Actions button connected to any workflow entry to display a menu of actions for monitoring and managing it.

Individual workflow actions are described below:

- **Disable/Enable**: Disables or enables the workflow. For more details, see Disabling/Enabling Workflows.
- **Run Now**: Immediately runs the workflow. For more details, see Running Workflows.
- **History**: Displays the workflow's execution history. For more details, see Workflow History.
- **Where Used**: Displays the parent workflows that this workflow is used in. For more details, see

Workflows Where Used.

- **Close**: Closes the Actions pop-up menu.

Actions to perform on multiple workflows:

Certain actions can be performed simultaneously on multiple workflows. Click the checkbox located at the very left of each workflow entry you wish to perform the action on. To select all entries, click the top-most **Select All** checkbox. The total number of selected items and available actions appear in the title bar.

Multi-workflow actions are described below:

- **Run Now**: Immediately runs all selected workflows. For more details, see Running Workflows.
- **Enable**: Enables all selected workflows that are currently disabled. No changes are made to selected workflows that are already enabled. For more details, see Disabling/Enabling Workflows.
- **Disable**: Disables all selected workflows that are currently enabled. No changes are made to selected workflows that are already disabled. For more details, see Disabling/Enabling Workflows.
- **Cancel**: Cancels selection of any multi-workflow action.

Sorting and Filtering Workflows

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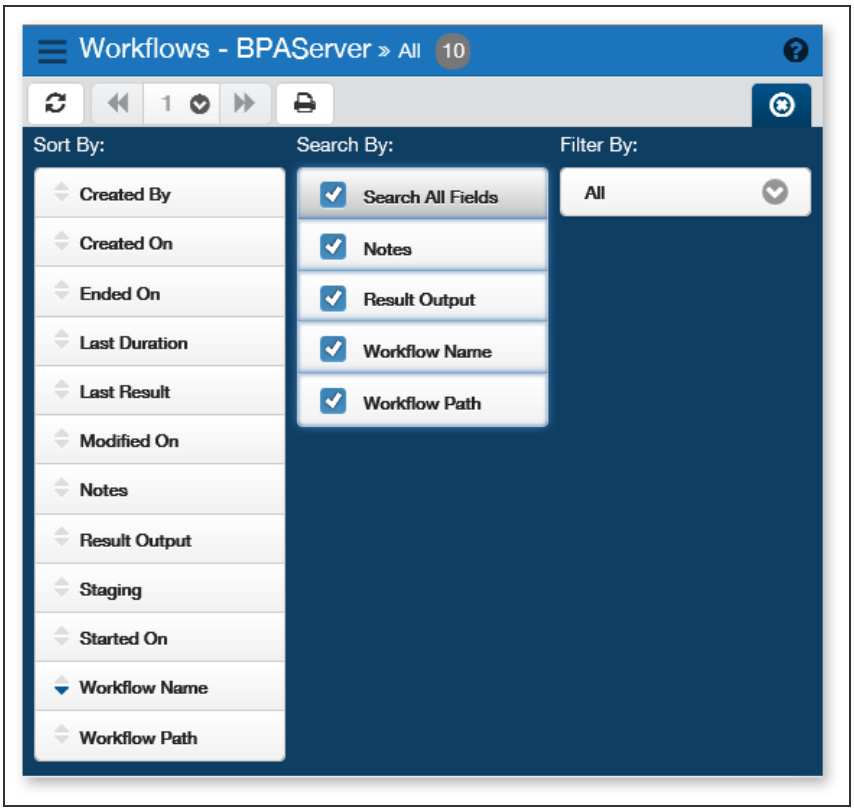
Sorting & Filtering Workflows

To make the Workflows page easier to work with, you can display the list of records in a particular order and view only those records that meet a specific criteria or match a specific keyword. The **Sort By** and **Filter By** features can sift through your data and display only the records you require, arranged in the order you want them viewed. The **Search By** feature can further narrow keyword searches by indicating precisely which fields to search from.



Click the Settings button to access sort, search and filter preferences.

Sort By: Sorts the list of records in ascending or descending order based on the following criteria:

- **Created By**: Sorts the list based on the user who crated the workflow.
- **Created On**: Sorts the list based on the workflow creation date/time.
- **Ended On**: Sorts the list based on workflow completion date/time.
- **Last Duration**: Sorts the list based on the length of the latest runtime duration.
- **Last Result**: Sorts the list based on the last result output.
- **Modified On**: Sorts the list based on workflow last modified date/time.
- **Notes**: Sorts the list based on the notes entered.
- **Result Output**: Sorts the list based on workflow completion result.
- **Staging**: Sorts the list based on staging status.
- **Started On**: Sorts the list based on workflow start date/time.
- **Workflow Name**: Sorts the list based on workflow name.
- **Workflow Path**: Sorts the list based on the workflow's path to the repository.

Search By: Specifies which field(s) to search for matching text when entering a keyword in the Search dialog. The available options are:

- **Search All Fields** - All available fields will be searched for matching text.
- **Notes** - Notes will be searched for matching text.
- **Result Output** - The result output will be searched for matching text.

- **Workflow Name** - The workflow name will be searched for matching text.
- **Workflow Path** - The repository path will be searched for matching text.

Filter By: Narrows the list of records to display based on the following criteria:

- **All**: All records will be shown.
- **Conditional**: Only workflows that started based in a condition will be shown.
- **Disabled**: Only workflows that are currently disabled will be shown.
- **Enabled**: Only workflows that are currently enabled will be shown.
- **Failed**: Only failed workflow executions will be shown.
- **No Schedule**: Only non-scheduled workflows will be shown.
- **Scheduled**: Only scheduled workflows will be shown.
- **Success**: Only successful workflow executions will be shown.

Click the Settings button to save and close the settings.

Running Workflows

Situations may arise that requires you to immediately run a workflow aside from any schedule or triggering condition currently set for it. In such cases, you can manually run one or more workflows directly from the Workflows page. This applies to currently disabled workflows as well.

Running Individual Workflows

To run a single workflow:

1. From the Workflows page, Click the Show Actions button associated to the workflow you wish to run.
2. Select **Run Now** from the actions pop-up menu.

Running Multiple Workflows

For convenience, you can run multiple workflows sequentially. To run two or more workflows:

1. From the Workflows page, click the checkbox located at the very left of each workflow you wish to run. To select all records, click the top-most Select All checkbox.
2. Click the **Run Now** button that appears on the title bar.

Workflows

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Disabling/Enabling Workflows

Adding a trigger to a workflow allows it to launch automatically, without any user intervention. This is ideal for running a workflow on a specific schedule or upon the occurrence of a specific condition or event. You may encounter a situation that requires you to disable such functionality for one or more workflows, such as during maintenance periods, holidays or when execution of one workflow may interfere with another. In such cases, you can disable one or more workflows from starting automatically via the Workflows page.

When a workflow is disabled, any triggering condition attached to it is ignored. However, it can still be run manually from the Workflows page by clicking **Run Now** (or from Automate Enterprise Management Console by clicking **Run**). See Running Workflows for more details.

Disabling/Enabling Individual Workflows

To disable a single workflow:

1. From the Workflows page, Click the Show Actions button associated to the workflow you wish to disable.
2. Select **Disable** from the actions pop-up menu. For easy detection, a Disabled icon will appear next to the name of the newly disabled workflow.

To enable a disabled workflow, follow the same steps above and select **Enable** from the actions pop-up menu. The option **Disable** or **Enable** alternates based on the current condition of the workflow.

Disabling/Enabling Multiple Workflows:

For convenience, multiple workflows can be disabled or enabled sequentially. To disable two or more workflows:

1. From the Workflows page, click the checkbox located at the very left of each workflow you wish to disable. To select all records, click the top-most Select All checkbox.
2. Click the **Disable** button that appears on the title bar. If any of the selected workflows are already disabled, no action will be applied to those workflows and they will remain disabled.

To enable two or more disabled workflows, follow the same steps above and click the **Enable** button from the title bar.

Workflows

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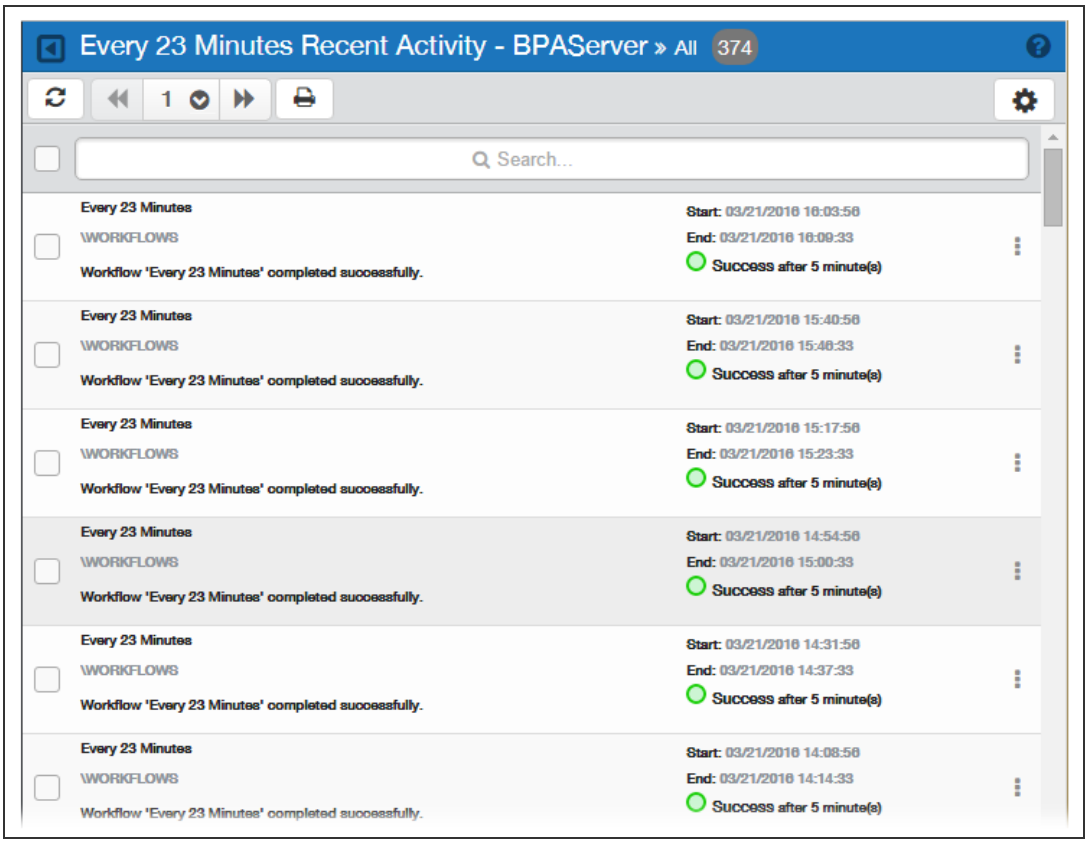
Workflow History (Recent Activity)

The Workflow History page (also known as Workflow Recent Activity page) displays previous execution history for a specific workflow. It is useful for gathering information about each run instance of a workflow, including when execution started/ended, how long the workflow ran, and whether it ran successfully or failed.

The Workflow History page can be accessed from the Workflows and Automate Enterprise Activity page as well as the History, Active and Upcoming widgets. Simply click the Show Actions button located at the very right of any workflow entry and select **History** from the pop-up menu.



Things to know and do:

- The total number of run instances of the workflow will appear in the title bar. This number may be dependent on any filter applied. For more details, see Sorting and Filtering Workflow History.
- Click the Refresh button to update the display with the latest data.

- If records span multiple pages, click the next or previous arrow to navigate to the next/previous page. To jump directly to a specific page, click the page number down arrow

and select the desired page from the drop-down list.

- Click the Print button to view workflow history in HTML format. You can then select all the records (**Ctrl+A**) and copy it (**Ctrl+C**) to paste it into a spreadsheet. **Note:** You may have to disable pop-up blockers in your browser to view the list.
- Use the **Search...** dialog to enter all or part of a keyword associated to a workflow instance and view only those records with keywords that contain matching text. Found instances may be dependent on any search filter applied. For more details, see Sorting and Filtering the Workflow History Display.

Actions to perform:

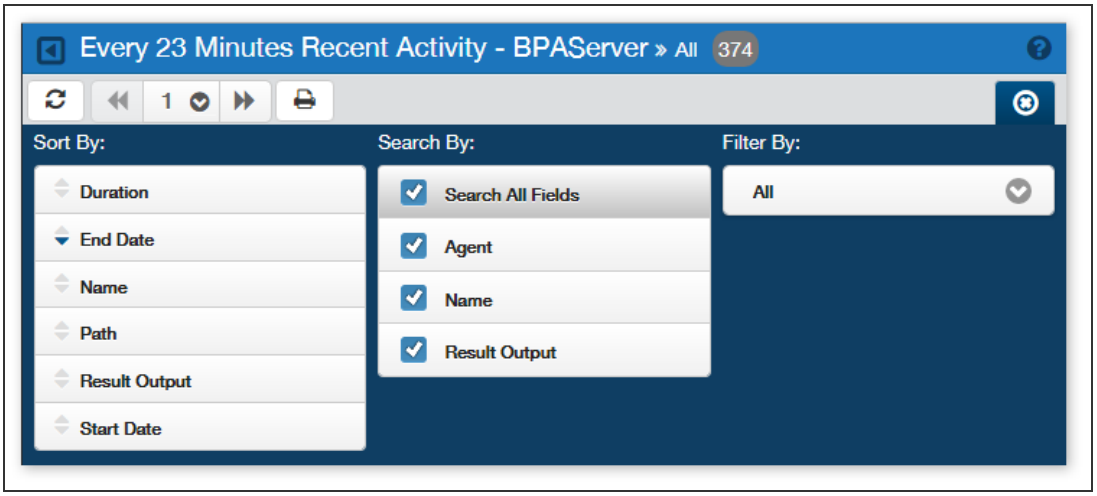
Click the Show Actions button located on the very right of any workflow entry to display options for monitoring and managing it.

Individual workflow history actions are described below:

- **Disable**: Disables a workflow or enables a currently disabled workflow. For more details, see Disabling/Enabling Workflows.
- **Run Now**: Immediately runs the workflow. For more details, see Running Workflows.
- **History**: Displays the workflow's execution history. For more details, see Workflow History.
- **Where Used**: Displays the parent workflows that this workflow is used in. For more details, see Workflows Where Used.
- **Close**: Closes the pop-up menu.

Sorting & Filtering Workflow History

To make the Workflow History page easier to work with, you can display the list of records in a particular order and view only those records that meet a specific criteria or match a specific keyword. The **Sort By** and **Filter By** features can sift through your data and display only the records you require, arranged in the order you want them viewed. The **Search By** feature can further narrow keyword searches by indicating precisely which fields to search from.



Click the Settings button to access sort, search and filter preferences.

Sort By: Sorts the list of records in ascending or descending order based on the following criteria:

- **Duration** - Sorts the list based on runtime duration.
- **End Date** - Sorts the list based on completion date/time.
- **Name** - Sorts the list based on workflow name.
- **Path** - Sorts the list based on the path to the repository.
- **Result Output** - Sorts the list based on completion result.
- **Start Date** - Sorts the list based on start date/time.

Search By: Specifies which field(s) to search for matching text when entering a keyword in the Search dialog. The available options are:

- **Search All Fields** - All available fields will be searched for matching text.
- **Agent** - Associated agents will be searched for matching text.
- **Name** - The workflow name will be searched for matching text.
- **Result Output** - The result output will be searched for matching text.

Filter By: Narrows the list of records to display based on the following criteria:

- **All** - All workflow execution records will be shown.
- **Conditional** - Only conditional workflow executions will be shown.
- **Failed** - Only failed workflow executions will be shown.

- **Five Minutes to an Hour** - Only workflow executions that started between the last five minutes to an hour will be shown.
- **Less than 5 Minutes** - Only workflow executions that started within the last five minutes will be shown.
- **Manually Run** - Only workflow executions that were started manually will be shown. Triggered workflows will be omitted.
- **Not Scheduled** - Only workflow executions that were not scheduled will be shown.
- **Over an Hour** - Only workflow executions that started over an hour ago will be shown.
- **Scheduled** - Only scheduled workflow executions will be shown.
- **Success** - Only successful workflow executions will be shown.
- **Triggered** - Only workflow executions that were started by a trigger will be shown. Manually started workflows will be omitted.

Click the Settings button to save and close the settings.

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Workflows Where Used

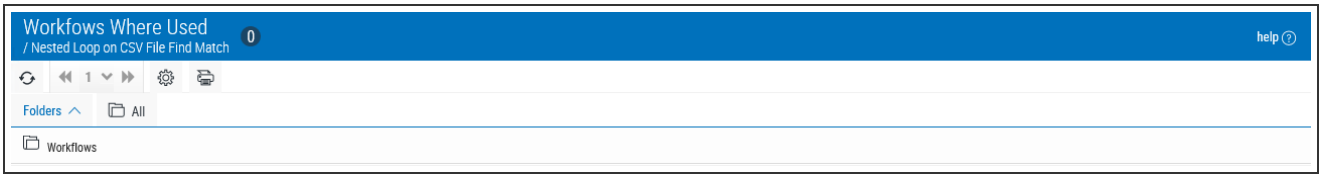
Running Workflows

Disabling/Enabling Workflows

Workflows Where Used

A sub-workflow or child workflow is a workflow execution that is initiated by another (parent) workflow execution. The Workflows Where Used page displays all parent workflows that currently use the specified workflow as a child or sub-workflow. Use this page to quickly determine the status of workflows that contain a particular sub-workflow. Records can be sorted by start time and workflow name.

The Workflows Where Used page can be accessed from the Workflows and Automate Enterprise Activity page as well as the History, Active and Upcoming widgets. Simply click the Show Actions button located at the very right of any workflow entry and select **Where Used**.



Things to know and do:

- The total number of records will appear in the title bar.
- Click the Refresh button to refresh the data being displayed.

- If records span multiple pages, click the next or previous arrow to navigate to the next/previous page. To jump directly to a specific page, click the page down arrow

and select the desired page from the drop-down list.
- To display records for only certain workflows that belong to a specific folder or sub-folder, click the drop-down button and drill down to the desired folder.
- Click the Print button to view the tasks list in HTML format. You can then select all the records (**Ctrl+A**) and copy it (**Ctrl+C**) to paste it into a spreadsheet. **Note:** You may have to disable pop-up blockers in your browser to view the list.

Actions to perform:

Click the Show Actions button located on the very right of any workflow entry to display options for monitoring and managing it.

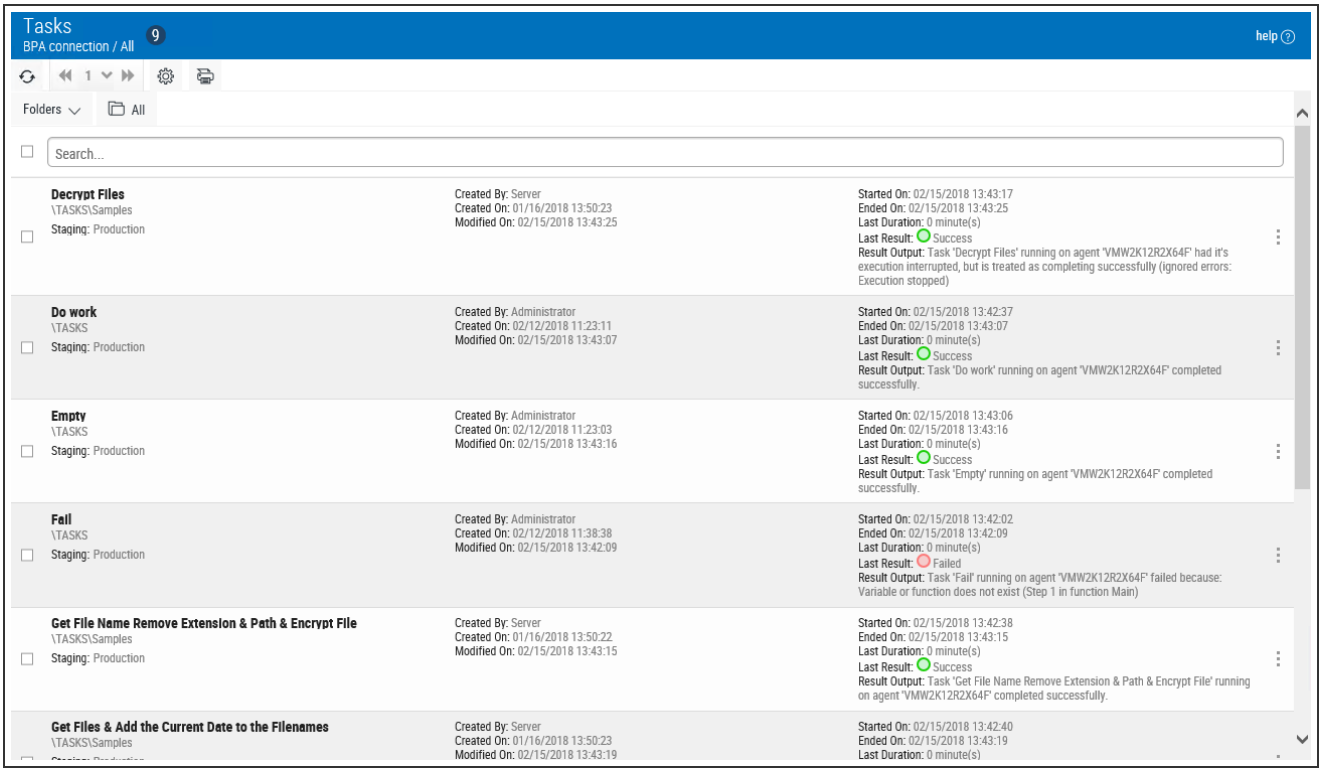
The following Workflow Where Used actions will be available:

- **Disable/Enable** - Disables or enables the workflow. For more details, see Disabling/Enabling Workflows.
- **Run Now** - Immediately runs the workflow. For more details, see Running Workflows.
- **History** - Displays the workflow's execution history. For more details, see Workflow History.
- **Where Used** - Displays the parent workflows that this workflow is used in.
- **Close** - Closes the Actions pop-up menu.

Processes

Tasks

The Tasks page displays various attributes about the tasks contained in your repository. It is useful for viewing important task details, such as name, repository location, creation date, last modified date, last run date and result of last run. You can sort the list of tasks based on a specific attribute or apply filters to narrow the list based on certain qualifying criteria. The Tasks page also contains preferences for managing and monitoring tasks, such as the option to disable, enable or immediately run one or more tasks.



To view the Tasks page, click **Tasks** under the Automate Enterprise menu.

Things to know and do:

- The total number of records appear on the title bar. This number may be dependent on any filter applied. For more details, see Sorting and Filtering the Tasks Display.
- Click the Refresh button to refresh the information in the display.

- If records span multiple pages, click the next or previous arrow to navigate to the next/previous page. To jump directly to a specific page, click the page number down arrow

and select the desired page from the drop-down list.

- Click the print button to view the list in HTML format. You can then enter (**Ctrl+A**) to select all records, (**Ctrl+C**) to perform a copy, and paste the data into any spreadsheet. **Note:** You may have to disable pop-up blockers in your browser to view the list.
- To display only certain tasks that belong to a specific folder or sub-folder, click the down arrow and drill down to the desired folder.
- Use the **Search...** dialog to enter all or part of a keyword associated to a task and view only those records with keywords that contain matching text. Found tasks may be dependent on any search filter applied. For more details, see Sorting and Filtering the Tasks Display.

Actions to perform on individual tasks:

Click the Show Actions button located at the very right of any task entry to display a menu of actions for monitoring and managing it.

Individual task actions are described below:

- **Disable/Enable** - Disables or enables the task. For more details, see Disabling/Enabling Tasks.
- **Run Now** - Immediately runs the task. For more details, see Running Tasks.
- **History** Displays execution history of the task. For more details, see Task History.
- **Where Used** - Shows the workflows that use the task. For more details, see Task Where Used.
- **Close** - Closes the actions menu.

Actions to perform on multiple tasks:

For convenience, certain actions can be performed sequentially on multiple tasks, such as **Enable**, **Disable** and **Run Now**. Click the checkbox located at the very left of each entry you wish to perform the action on. To select all entries, click the top-most Select All checkbox. The total number of selected items and available options will appear in the title bar.

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Sorting & Filtering Tasks

To make the Tasks page easier to work with, you may want to display the list of records in a particular order and view only those records that meet a specific criteria or match a specific keyword. The **Sort By** and **Filter By** functions can sift through your data and display only the records you require, arranged in the order you want them viewed. The **Search By** function can further narrow keyword searches by indicating precisely which fields to search from.

Click the Settings button to access sort, search and filter preferences.

Sort By: Sorts the list of records in ascending or descending order based on the following criteria:

- **Created By** - Sorts the list based on the name of the user who created the task.
- **Created On** - Sorts the list based on the task creation date/time.
- **Ended On** - Sorts the list based on task completion date/time.
- **Last Duration** - Sorts the list based on the length of the latest runtime duration.
- **Last Result** - Sorts the list based on the last result output.
- **Modified On** - Sorts the list based on last modified date/time.
- **Notes** - Sorts the list based on the notes entered.
- **Result Output** - Sorts the list based on completion result (i.e., Success, Failed).
- **Staging** - Sorts the list based on staging status (i.e., In Development, Testing, Production Archive).
- **Started On** - Sorts the list based on execution start date/time.
- **Task Name** - Sorts the list based on task name.
- **Task Path** - Sorts the list based on the path to the repository.

Search By: Specifies which field(s) to search for matching text when entering a keyword in the Search dialog. The available options are:

- **Search All Fields** - All available fields will be searched for matching text.
- **Notes** - Task notes will be queried for matching text.
- **Result Output** - The task completion result will be queried for matching text.
- **Task Name** - The task name will be queried for matching text.
- **Task Path** - The task repository path will be queried for matching text.

Filter By: Narrows the list of records to display based on the following criteria:

- **All** - All records will be shown.
- **Disabled** - Only tasks that are currently disabled will be shown.
- **Enabled** - Only tasks that are currently enabled will be shown.
- **Failed** - Only tasks with a Failed result output will be shown.
- **Success** - Only tasks with a Success result output will be shown.

Click the Settings button to save and close the settings.

Running Tasks

Situations may arise that requires you to run a task immediately and/or individually, outside the context of a workflow. In such cases, you can manually run one or more tasks directly from the Tasks page. You can also run individual tasks manually from the Task History page. This applies to disabled tasks as well. See Disabling/Enabling Tasks for more details.

Running Individual Tasks

The Tasks page allows you to run individual tasks manually. To run a single task:

1. Click the Show Actions button associated to the task you wish to run.
2. Select **Run Now** from the actions pop-up menu.
3. From the Select Agent window that appears, select the agent you wish to run the task on.

Running Multiple Tasks

For convenience, the Tasks page allows you to run multiple tasks sequentially. To run two or more tasks:

1. From the Tasks page, click the checkbox located at the very left of each task you wish to run. To select all records, click the top-most Select All checkbox.
2. Click the **Run Now** button that appears on the title bar.
3. From the Select Agent window that appears, select the agent you wish to run the tasks on.

Running a Task from the Task History Page

The Task History page allows you to run a task on the same agent from where it previously ran or select a different agent to run the task.

To run the task on the same agent from where it previously ran:

1. Click the Show Actions button associated to the task you wish to run.
2. Select **Run on Same Agent** from the actions pop-up menu.

To select an agent to run the task:

1. Click the Show Actions button associated to the task you wish to run.
2. Select **Run Now** from the actions pop-up menu.

3. From the Select Agent window that appears, select the agent you wish to run the task on.

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Disabling/Enabling Tasks

Certain situations may arise that requires you to restrict one or more tasks from running, such as during maintenance periods, holidays, or to prevent one task from interfering with another. In such cases, you can prevent tasks from starting automatically by disabling them.

When a task is disabled, it is bypassed during workflow execution. However, it can still be run manually from the Ops Console's Tasks page by clicking **Run Now** (or from Automate Enterprise Management Console by clicking **Run**). See Running Tasks for more details.

Disabling/Enabling Individual Tasks

To disable a single task:

1. From the Tasks page, click the Show Actions button associated to the task you wish to disable.
2. Select **Disable** from the actions pop-up menu. For easy detection, a Disabled icon will appear next to the name of the newly disabled task.

To enable a currently disabled task, follow the same steps above and select **Enable** from the actions pop-up menu. The option **Disable** or **Enable** alternates based on the current condition of the task.

Disabling/Enabling Multiple Tasks:

For convenience, multiple tasks can be disabled or enabled sequentially. To disable two or more tasks:

1. From the Tasks page, click the checkbox located at the very left of each task you wish to disable. To select all records, click the top-most Select All checkbox.
2. Click the **Disable** button that appears on the title bar. If any of the selected tasks are already disabled, no action will be applied to those tasks and they will remain disabled.

To enable two or more disabled tasks, follow the same steps above and click the **Enable** button from the title bar.

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Task History

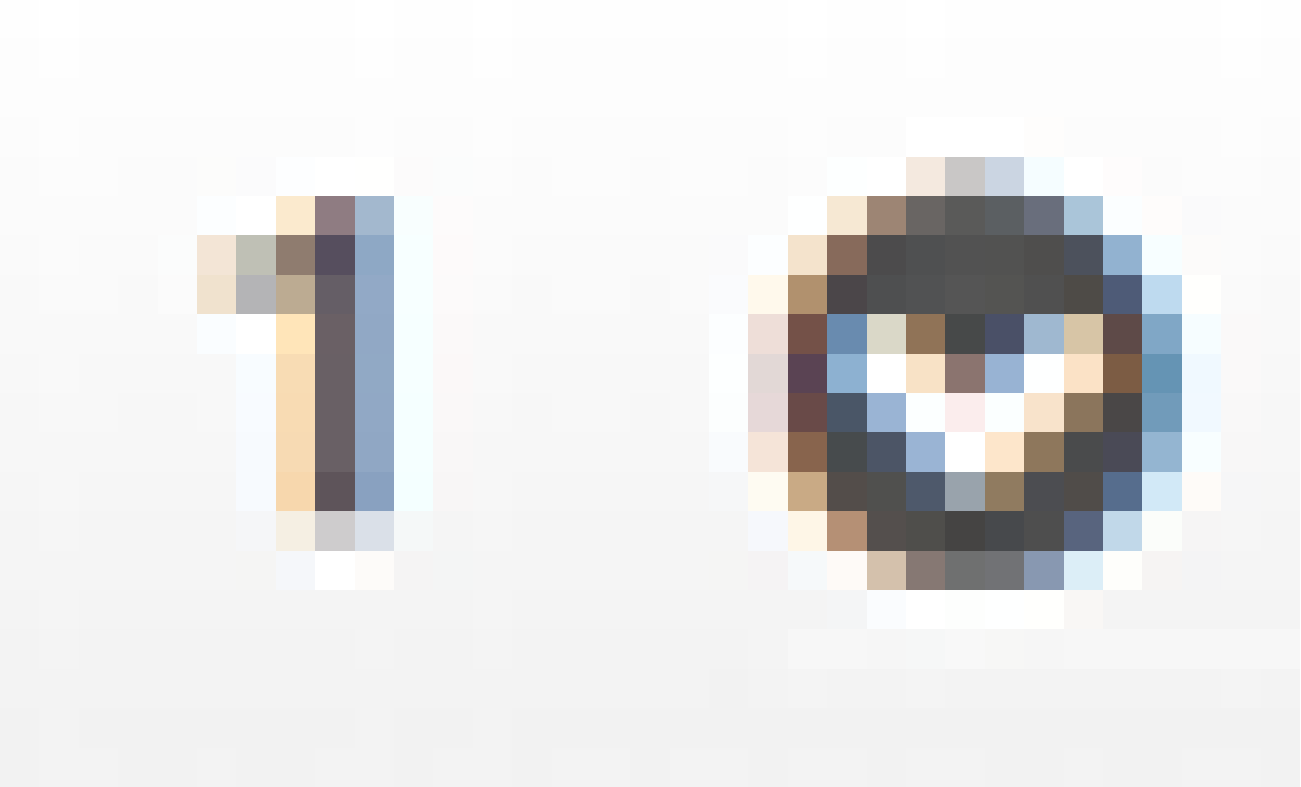
The Task History page (also known as Recent Activity page) displays historic data gathered from previous runs of a particular task. It is useful for tracking significant information about each run instance of a task, such as when execution started/ended, how long the task ran, and whether it ran successfully or failed. Completion statistics are color coded for easy detection. The Task History page also contains preferences for managing and monitoring a task, such as the option to immediately run the task or show the workflows that currently use the task.

The Task History page can be accessed from the Tasks page, Automate Enterprise Activity page and various dashboard widgets.

- To view task history from the Tasks page, Click the Show Actions button located at the very right of a particular task entry and select **Show Task History**.
- To view task history from the Automate Enterprise Activity page, Click the Show Actions button located at the very right of a particular task entry from either the Active Instances or Recent Activity column, and select **History**.

Things to know and do:

- The total number of run instances of the task will appear in the title bar. This number may be dependent on any filter applied. For more details, see Sorting and Filtering the Task History Display.
- Click the Refresh button to refresh the information in the display.
- If records span to multiple pages, click the next arrow to go to the next page or the previous arrow to return to the previous page. To jump to a specific page, click the page number drop-down button



and select the desired page.

- Click the Print button to view task history in HTML format. You can then select all the records (**Ctrl+A**) and copy it (**Ctrl+C**) to paste it into a spreadsheet. **Note:** You may have to disable pop-up blockers in your browser to view the list.
- Use the **Search...** dialog to enter all or part of a keyword associated to a task instance and view only those records with keywords that contain matching text. Found records may be dependent on any search filter applied. For more details, see Sorting and Filtering the Task History Display.

Actions to Perform:

Click the Show Actions button located at the very right of any entry to display a menu of actions for monitoring and managing it.

Available actions from the Task History page are described below:

- **Disable/Enable**: Disables the task or enables a currently disabled task. For more details, see Disabling/Enabling Tasks.
- **Run on Same Agent**: Immediately runs the task on the same agent from where it previously ran. For more details, see Running Tasks.
- **Run Now**: Immediately runs the task on the agent specified. For more details, see Running Tasks.
- **History**: Displays execution history of the task.
- **Where Used**: Shows the workflows that use the task. For more details, see Tasks Where Used.
- **Close** - Closes the actions menu.

Sorting & Filtering Task History

To make the Task History page easier to work with, you can display the list of records in a particular order and view only those records that meet a specific criteria or match a specific keyword. The **Sort By** and **Filter By** features can sift through your data and display only the records you require, arranged in the order you want them viewed. The **Search By** feature can further narrow keyword searches by indicating precisely which fields to search from.

Click the Settings button to access sort, search and filter preferences.

Sort By: Sorts the list of records in ascending or descending order based on the following criteria:

- **Duration** - Sorts the list based on runtime duration.
- **End Date** - Sorts the list based on task completion date/time.
- **Name** - Sorts the list based on task name.
- **Path** - Sorts the list based on the path to the repository.
- **Result Output** - Sorts the list based on completion result.
- **Start Date** - Sorts the list based on task start date/time.

Search By: Specifies which field(s) to search for matching text when entering a keyword in the Search dialog. The available options are:

- **Search All Fields** - All available fields will be searched for matching text.
- **Agent** - Associated agents will be searched for matching text.
- **Name** - The task name will be searched for matching text.
- **Result Output** - The result output will be searched for matching text.

Filter By: Narrows the list of records to display based on the following criteria:

- **All** - All records will be shown.
- **Conditional** - Only conditional executions will be shown.
- **Failed** - Only failed executions will be shown.
- **Five Minutes to an Hour** - Only executions that started between the last five minutes to an hour will be shown.
- **Less than 5 Minutes** - Only executions that started within the last five minutes will be shown.
- **Manually Run** - Only manual executions will be shown.
- **Not Scheduled** -Only non-scheduled executions will be shown.
- **Over an Hour** - Only executions that started over an hour ago will be shown.
- **Scheduled** - Only scheduled executions will be shown.
- **Success** - Only successful executions will be shown.
- **Triggered** - Only executions that were triggered will be shown.

Click the Settings button to save and close the settings.

Tasks Where Used

The Tasks Where Used page displays all workflows that use the specified task. Use this page to quickly determine the status of workflows that contain a particular task. Records can be sorted by start time and name.

The Tasks Where Used page can be accessed from the Tasks and Automate Enterprise Activity page as well as the Automate Enterprise History and Active widgets. Simply click the Show Actions button located at the very right of any workflow entry and select **Where Used**.

Things to know and do:

- The total number of records will appear in the title bar.
- Click the Refresh button to refresh the information in the display.
- If records span multiple pages, click the next or previous arrow to navigate to the next/previous page. To jump directly to a specific page, click the page number down arrow

and select the desired page from the drop-down list.
- To display records for only certain tasks that belong to a specific folder or sub-folder, click the drop-down button and drill down to the desired folder.
- Click the Print button to view the tasks list in HTML format. You can then select all the records (**Ctrl+A**) and copy it (**Ctrl+C**) to paste it into a spreadsheet. **Note:** You may have to disable pop-up blockers in your browser to view the list.

Actions to perform:

Click the Show Actions button located on the very right of any workflow entry to display options for monitoring and managing it.

The following actions are available:

- **Disable/Enable** - Disables or enables the task. For more details, see Disabling/Enabling Tasks.
- **Run Now** - Immediately runs the task. For more details, see Running Tasks.
- **History** Displays execution history of the task. For more details, see Task History.
- **Where Used** - Shows the workflows that use the task.
- **Close** - Closes the actions menu.

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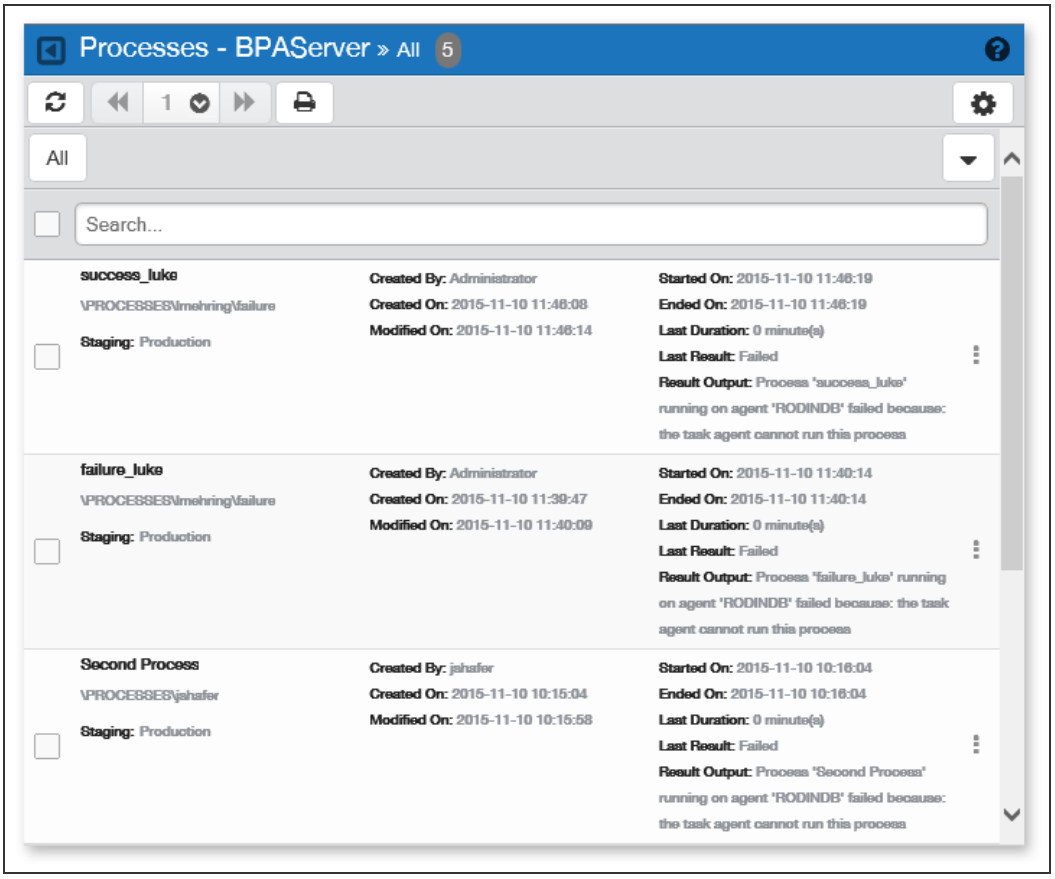
Processes

The Processes page displays various attributes about the process objects contained in your repository. It is useful for viewing important details about your processes, such as name, repository location, creation date, last modified date, last run date and result of last run. You can sort the list of processes based on a specific attribute or apply filters to narrow the list based on certain qualifying criteria. The Processes page also contains preferences for managing and monitoring your processes, such as the option to disable, enable or immediately run one or more processes.



To view the Processes page, click **Processes** under the Automate Enterprise menu.

Things to know and do:

- The total number of records will appear in the title bar. This number may be dependent on the filter applied. See Sorting and Filtering the Processes Display for more details.

- If records span to multiple pages, click the next arrow to go to the next page or the previous arrow to return to the previous page. To jump to a specific page, click the page number drop-down

button and select the desired page.
- To display records for only certain processes that belong to a specific folder or sub-folder, click the Drop-down button and drill down to the desired folder.
- Click the Refresh button to refresh the information in the display.
- Click the Print button to view the processes list in HTML format. You can then select all the records (**Ctrl+A**) and copy it (**Ctrl+C**) to paste it into a spreadsheet. **Note:** You may have to disable pop-up blockers in your browser to view the list.
- Use the Search dialog to enter all or part of a key word associated to a process and view only those records with key words that contain matching text. Found records may be dependent on the search filter applied. See Sorting and Filtering the Processes Display for more details.

Actions to perform on individual processes:

Click the Show Actions button located at the very right of any process entry to display various options for monitoring and managing it.

The following actions will appear:

- **Disable/Enable** - Disables or enables the process. For more details, see Disabling/Enabling Processes.
- **Run Now** - Immediately runs the process. For more details, see Running Processes.
- **History** - Displays execution history of the process. For more details, see Process History.

- **Where Used** - Displays the workflows that use the process. For more details, see Processes Where Used.
- **Close** - Closes the actions list pop-up window.

Actions to perform on multiple processes:

For convenience, certain actions can be performed sequentially on two or more processes, such as **Enable**, **Disable** and **Run Now**. Click the checkbox located at the very left of each process entry you wish to perform the action on. To select all entries, click the top-most Select All checkbox. The total number of selected items and available options will appear in the title bar.

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Sorting & Filtering Processes

To make the Processes page easier to work with, you can display the list of records in a particular order and view only those records that meet a specific criteria or match a specific keyword. The **Sort By** and **Filter By** features can sift through your data and display only the records you require, arranged in the order you want them viewed. The **Search By** feature can further narrow keyword searches by indicating precisely which fields to search from.

Click the Settings button to access sort, search and filter preferences.

Sort By: Sorts the list of records in ascending or descending order based on the following criteria:

- **Created By** - Sorts the list based on the user who crated the process.
- **Created On** - Sorts the list based on the process creation date/time.
- **Ended On** - Sorts the list based on process completion date/time.
- **Last Duration** - Sorts the list based on the length of the latest process runtime duration.
- **Last Result** - Sorts the list based on the last result output.
- **Modified On** - Sorts the list based on last modified date/time of the process.
- **Notes** - Sorts the list based on the notes.
- **Process Name** - Sorts the list based on process name.
- **Process Path** - Sorts the list based on the path to the repository.
- **Result Output** - Sorts the list based on result output.
- **Staging** - Sorts the list based on staging status.
- **Started On** - Sorts the list based on process start date/time.

Search By: Specifies which field(s) to search for matching text when entering a keyword in the **Search** dialog. The available options are:

- **Search All Fields** - All available fields will be searched for matching text.
- **Notes** - Notes will be searched for matching text.
- **Process Name** - The process name will be searched for matching text.
- **Process Path** - The repository path will be searched for matching text.
- **Result Output** - The result output will be searched for matching text.

Filter By: Narrows the list of records to display based on the following criteria:

- **All** - All records will be shown.
- **Disabled** - Only disabled processes will be shown.
- **Enabled** - Only enabled processes will be shown.
- **Failed** - Only failed process executions will be shown.
- **Success** - Only successful process executions will be shown.

Click the Settings button to save and close the settings.

Running Processes

Situations may arise that requires you to run a process immediately and/or individually, outside the context of a workflow. In such cases, you can manually run one or more processes directly from the Processes page. This applies to disabled processes as well. See Disabling/Enabling Processes for more details.

Running Individual Processes

To run a single processes:

1. From the Processes page, Click the Show Actions button associated to the process you wish to run.
2. Select **Run Now** from the actions pop-up menu.

Running Multiple Processes

For convenience, you can run multiple processes sequentially. To run two or more processes:

1. From the Processes page, click the checkbox located at the very left of each process you wish to run. To select all records, click the top-most Select All checkbox.
2. Click the **Run Now** button that appears on the title bar.

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Disabling/Enabling Processes

Situations may arise that requires Automate Enterprise processes to be disabled, such as during maintenance periods, holidays, or to prevent one process from interfering with another. In such cases, you can prevent one or more processes from starting by disabling them.

When a process is disabled, it is bypassed during workflow execution. However, it can still be run manually from the Processes page by clicking the Show Actions button and selecting **Run Now** (or from Automate Enterprise Management Console by clicking the **Run** button). See Running Processes for more details.

Disabling/Enabling Individual Processes

To disable a single process:

1. From the Processes page, click the Show Actions button associated to the process you wish to disable.
2. Select **Disable** from the actions pop-up menu. For easy detection, a Disabled icon is placed next to the name of the newly disabled process.

To enable a disabled process, follow the same steps above and select **Enable**. The option **Disable** or **Enable** alternates based on the current condition of the process.

Disabling/Enabling Multiple Processes

For convenience, multiple processes can be disabled or enabled sequentially. To disable two or more processes:

1. From the Processes page, click the checkbox located at the very left of each processes you wish to disable. To select all records, click the top-most Select All checkbox.
2. Click the **Disable** button that appears on the title bar. If any of the selected processes are already disabled, no action will be applied to those processes and they will remain disabled.

To enable two or more disabled processes, follow the same steps above and click the **Enable** button from the title bar.

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Process History

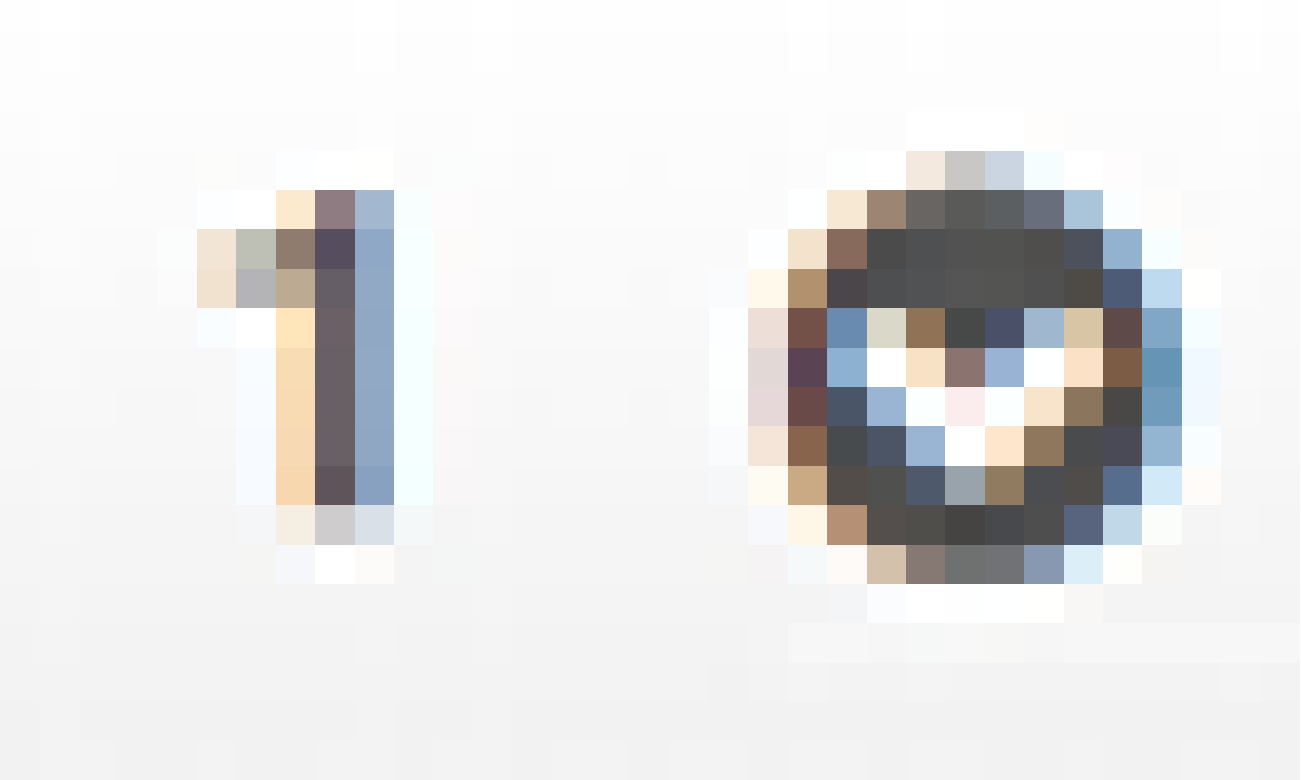
The Process History page (also known as Process Recent Activity page) displays execution history for a specific process. It is useful for gathering information about each runtime instance of a particular process, including when execution started/ended, how long the process ran, and whether it ran successfully or failed. The Process History page also contains preferences for managing and monitoring a specific process, such as the option to immediately run the process or show the workflows where the process is used.

The Process History page can be accessed from the Processes page or Automate Enterprise Activity page:

- To view process history from the Processes page, click the Show Actions button located at the very right of a particular process entry and select **History**.
- To view process history from the Automate Enterprise Activity page, click the Show Actions button located at the very right of a particular process entry from either the Active Instances or Recent Activity column, and select **History**.

Things to know and do:

- The total number of runtime instances of a process will appear in the title bar. This number may be dependent on the filter applied. See Sorting and Filtering Process History for more details.
- Click the Refresh button to refresh the information in the display.
- If records span multiple pages, click the next arrow to go to the next page or the previous arrow to return to the previous page. To jump to a specific page, click the page number drop-down



button and select the desired page.

- Click the Print button to view process history in HTML format. You can then select all the records (**Ctrl+A**) and copy it (**Ctrl+C**) to paste it into a spreadsheet. **Note:** You may have to disable pop-up blockers in your browser to view the list.
- Use the Search dialog to enter all or part of a keyword associated to a process instance and view only those records with keywords that contain matching text. Found records may be dependent on the search filter applied. See Sorting and Filtering Process History for more details.

Actions to perform:

Click the Show Actions button located on the very right of any process entry to display options for monitoring and managing it.

Available actions found in the Process History page are described below:

- **Disable/Enable**: Disables the process or enables a currently disabled process. For more details, see Disabling/Enabling Processes.
- **Run on Same Agent**: Immediately runs the process on the same agent from where it previously ran. For more details, see Running Processes.
- **Run Now**: Immediately runs the process on the agent specified. For more details, see Running Processes.
- **History**: Displays execution history of the process.
- **Where Used**: Shows the workflows that use the process. For more details, see Processes Where Used.
- **Close** - Closes the actions menu.

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Sorting & Filtering Process History

To make the Process History page easier to work with, you can display the list of records in a particular order and view only those records that meet a specific criteria or match a specific keyword. The **Sort By** and **Filter By** features can sift through your data and display only the records you require, arranged in the order you want them viewed. The **Search By** feature can further narrow keyword searches by indicating precisely which fields to search from.

Click the Settings button to access sort, search and filter preferences.

Sort By: Sorts the list of records in ascending or descending order based on the following criteria:

- **Duration** - Sorts the list based on runtime duration.
- **End Date** - Sorts the list based on task completion date/time.
- **Name** - Sorts the list based on task name.
- **Path** - Sorts the list based on the path to the repository.
- **Result Output** - Sorts the list based on completion result.
- **Start Date** - Sorts the list based on task start date/time.

Search By: Specifies which field(s) to search for matching text when entering a keyword in the Search dialog. The available options are:

- **Search All Fields** - All available fields will be searched for matching text.
- **Agent** - Associated agents will be searched for matching text.
- **Name** - The task name will be searched for matching text.
- **Result Output** - The result output will be searched for matching text.

Filter By: Narrows the list of records to display based on the following criteria:

- **All** - All records will be shown.
- **Conditional** - Only conditional executions will be shown.
- **Failed** - Only failed executions will be shown.
- **Five Minutes to an Hour** - Only executions that started between the last five minutes to an hour will be shown.
- **Less than 5 Minutes** - Only executions that started within the last five minutes will be shown.
- **Manually Run** - Only manual executions will be shown.
- **Not Scheduled** - Only non-scheduled executions will be shown.
- **Over an Hour** - Only executions that started over an hour ago will be shown.
- **Scheduled** - Only scheduled executions will be shown.
- **Success** - Only successful executions will be shown.
- **Triggered** - Only triggered executions will be shown.

Click the Settings button to save and close the settings.

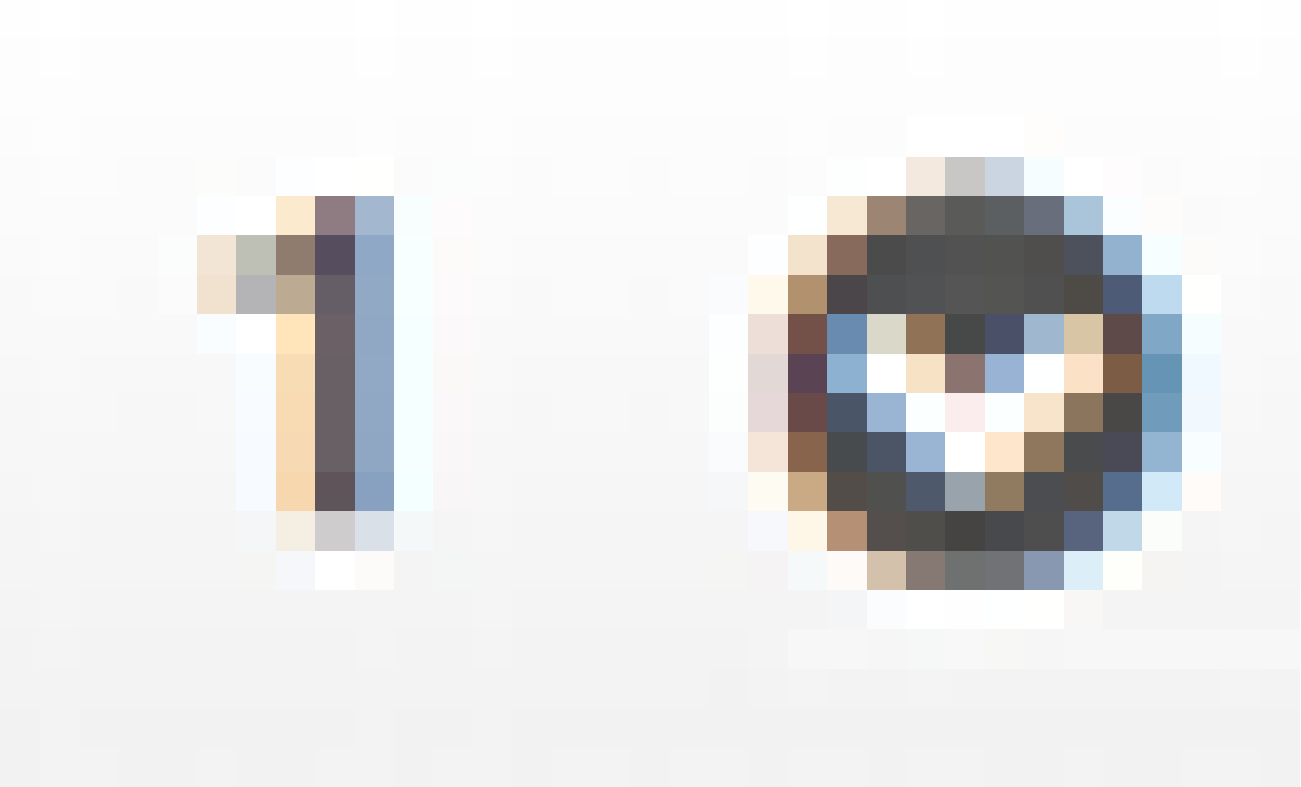
Processes Where Used

The Processes Where Used page displays all workflows that use the specified process. Use this page to quickly determine the status of workflows that contain a particular process. Records can be sorted by start time and workflow name.

The Processes Where Used page can be accessed from the Processes page by clicking the Show Actions button located at the very right of any process entry and selecting **Where Used**.

Things to know and do:

- The total number of records will appear in the title bar.
- Click the Refresh button to refresh the information in the display.
- If records span to multiple pages, click the next arrow to go to the next page or the previous arrow to return to the previous page. To jump to a specific page, click the page number drop-down button



and select the desired page.

- To display records for only certain processes that belong to a specific folder or sub-folder, click the drop-down button and drill down to the desired folder.
- Click the Print button to view the tasks list in HTML format. You can then select all the records (**Ctrl+A**) and copy it (**Ctrl+C**) to paste it into a spreadsheet. **Note:** You may have to disable pop-up blockers in your browser to view the list.

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The Agents page displays important information about task and process agents, such as agent name, repository location, creation date, total number of conditions monitored by the agent, and total number of tasks/processes currently running on the agent. It also contains preferences for managing and monitoring agents, such as the ability to immediately disable or enable an agent or display the list of conditions being monitored by an agent.

To view the Agents page, click **Agents** under the Automate Enterprise menu.

Things to know and do:

- The total number of agents will appear in the title bar.
- Click the Refresh button to refresh the information in the display.
- If records span multiple pages, click the next arrow to go to the next page or the previous arrow to return to the previous page. To jump to a specific page, click the page number drop-down

button and select the desired page.
- By default, all task and process agents are displayed. To display a specific type of agent, click the drop-down button and select the folder that matches the type of agent you want to display.
- Click the Print button to view the agents list in HTML format. You can then select all the records (**Ctrl+A**) and copy it (**Ctrl+C**) to paste it into a spreadsheet. **Note:** You may have to disable pop-up blockers in your browser to view the list.
- Use the **Search** dialog to enter all or part of a key word associated to an agent and view only those

records with key words that contain matching text. Found records may be dependent on the search filter applied. See Sorting and Filtering Agents for more details.

Actions to perform on agents:

Click the Show Actions button located at the very right of any agent entry to display a menu of actions for monitoring and managing it.

Individual agent actions are described below:

- **Disable/Enable**: Disables an agent or enables a currently disabled agent. For more details, see Disabling/Enabling Agents.
- **Show Conditions**: Displays the conditions that are monitored by the agent. For more details, see Agent Conditions.
- **Show Agent Activity**: Displays active instances running on the agent. For more details, see Agent Activity.
- **Close**: Closes the Actions list pop-up window.

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Sorting & Filtering Agents

The Agents page offers a **Sort By** feature that lets you indicate how the list of agents should be displayed based on a specific criteria. It also provides a **Search By** function that allows you to choose which fields to look for matching text when performing a keyword search.

Click the Settings button to access sort, search and filter preferences.

Sort By: Sorts the list of records in ascending or descending order based on the following criteria:

- **Agent Name** - Sorts the list based on the agent name.
- **CPU %** - Sorts the list based on CPU percentage being used.
- **Created By** - Sorts the list based on the user who crated the agent.
- **Created On** - Sorts the list based on the agent creation date/time.
- **Handles** - Sorts the list based on the handle count being used.
- **Modified On** - Sorts the list based on agent last modified date/time.
- **Monitored Conditions** - Sorts the list based on the number of monitored conditions.
- **Private Memory** - Sorts the list based on the private memory size being used.
- **Threads** - Sorts the list based on the number of threads being used.

Search By: Specifies which field(s) to search for matching text when entering a keyword in the Search dialog. The available options are:

- **Search All Fields** - All available fields will be searched for matching text.
- **Agent Name** - The name of the agent will be searched for matching text.
- **Notes** - Any agent notes entered will be searched for matching text.

Filter By: Narrows the list of records to display based on the following criteria:

- **All** - All records will be displayed.
- **Disabled** - Only disabled agents will be displayed.
- **Enabled** - Only enabled agents will be displayed.
- **Process** - Only process agents will be displayed.
- **Task** - Only task agents will be displayed.

Click the Settings button to save and close the settings.

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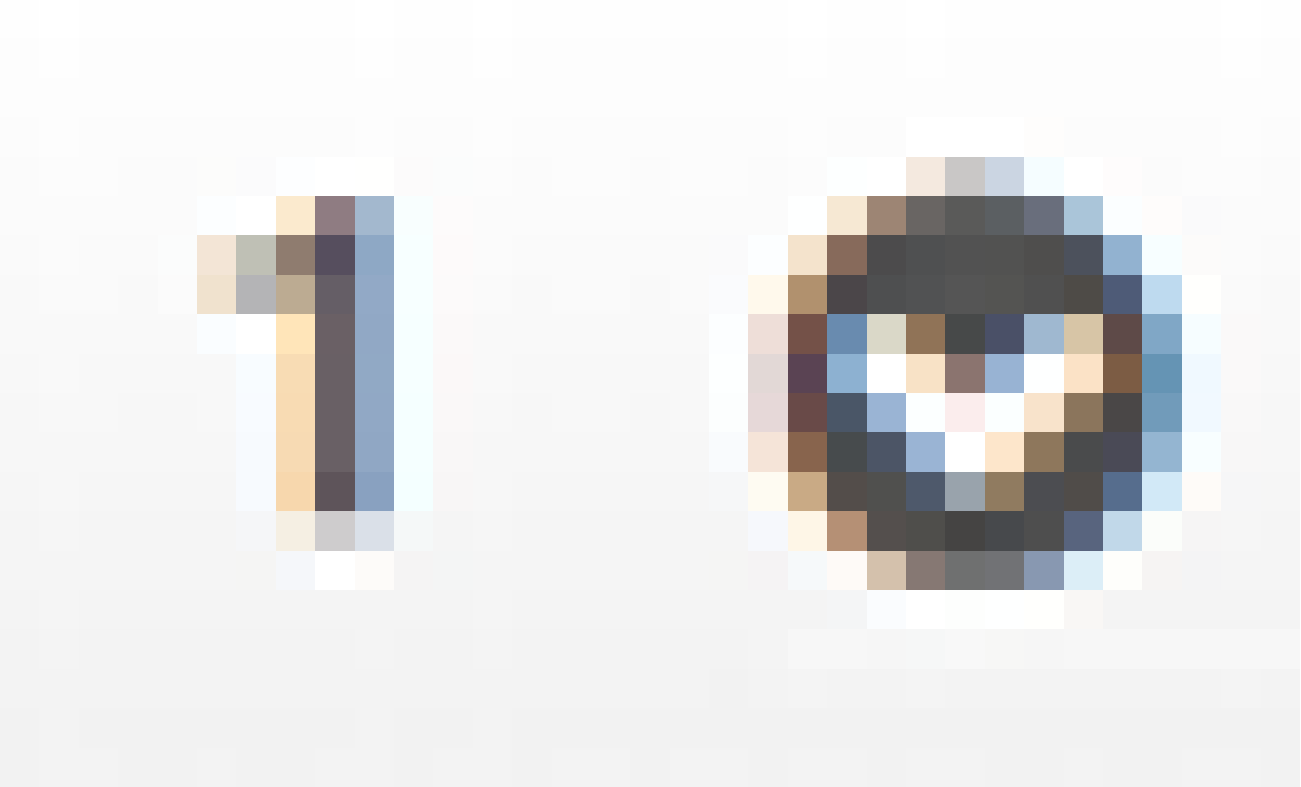
Agent Activity

The Agent Activity page provides a visual reference of active task or process instances that are currently running on a specific task or process agent. It can be used to track active instances to determine whether they are running as expected on the specified agent.

The Agent Activity page can be accessed from the Agents page. Click the Show Actions button located at the very right of an agent entry and select **Show Agent Activity**.

Things to know and do:

- The agent name and and total number of active instances appear in the title bar.
- Click the Refresh button to refresh the information in the display.
- If records span to multiple pages, click the page number drop-down button



to jump to a specific page. Or, click the next or previous arrow to navigate to the next/previous page.

- Click the Print button to view the active instances in HTML format. You can then select all the records (**Ctrl+A**) and copy it (**Ctrl+C**) to paste it into a spreadsheet. **Note:** You may have to disable pop-up blockers in your browser to view the list.

Actions to perform:

Click the Show Actions button located at the very right of an active instance to display actions for monitoring and managing it.

Actions may vary depending on the type of object. They are described below:

- **Stop** - Immediately stops execution of the active task (does not pertain to processes).
- **Pause/Resume from Pause** - Suspends execution of the active task or resumes a paused task (does not pertain to processes). Either the **Pause** or **Resume from Pause** option is displayed based on the current state of the specified task.
- **History** - Displays execution history of the active object.
- **Where Used** - Displays all workflows that use the active object.
- **Close** - Closes the actions list pop-up window.

Sorting Agent Activity:

There are settings contained in the Agent Activity page that allows you to indicate how the list of records should be sorted.

Click the Settings button to access sort preferences . Then, select a criteria under **Sort By** with which to sort the list and choose whether rows are sorted in ascending or descending order. Sort options are as follows:

- **Duration** - Sorts the list based on runtime duration.
- **Last Change Date** - Sorts the list based on date/time of last status change.
- **Name** - Sorts the list based on object name.
- **Path** - Sorts the list based on repository path.
- **Start Date** - Sorts the list based on execution start date/time.

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Agent Conditions

The Agent Conditions page displays information about the conditions that are currently being monitored by a specific task agent. Use this page to retrieve important data about each condition, such as condition name, type, repository location, staging status, creation date, last modified date, and more.

The Agent Conditions page can be accessed from the Agents page. Click the Show Actions button located at the very right of any task agent entry and select **Show Conditions**.

Things to know and do:

- The agent name and total number of monitored conditions appear in the title bar.
- Click the Refresh button to refresh the information in the display.

- If records span multiple pages, click the next arrow to go to the next page or the previous arrow to return to the previous page. To jump to a specific page, click the page number drop-down button

and select the desired page.

- Click the Print button to view the list in HTML format. You can then select all the records (**Ctrl+A**) and copy it (**Ctrl+C**) to paste it into a spreadsheet. **Note:** You may have to disable pop-up blockers in your browser to view the list.

Sorting Agent Conditions:

There are settings contained in the Agent Conditions page that allows you to indicate how the list of records should be sorted.

Click the Settings button to access sort preferences. Then, select a criteria under **Sort By** with which to sort the list and choose whether rows are sorted in ascending or descending order. Sort options are as follows:

- **Last Change Date** - Sorts the list based on the date/time of the most previous condition status change.
- **Name** - Sorts the list based on condition name.
- **Path** - Sorts the list based on condition repository path.
- **Start Date** - Sorts the list based on date/time a condition was last met.

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