User Guide

HelpSystems Insite
2.0

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Welcome to HelpSystems Insite

HelpSystems Insite gives you a single web interface where you can go to work with your HelpSystems products, all while using your browser on your desktop, or even on a mobile device, such as a phone or tablet.

After you download and install Insite on a Windows® or Linux® system, open the web interface in your favorite browser and point it at your Automate Enterprise server or IBM i system where you have the HelpSystems products installed. No updates are needed for the products you currently have running on those systems.

With Insite, you can access the following products (provided they're installed on the Automate Enterprise server or the IBM i):

- **Access Authenticator:** Use this to implement multi-factor authentication for user sign on.
- **Alignia Monitoring Room:** Use this to display information from your installation of Alignia in a web-based interface.
- **Authority Broker:** Use this to allow System Administrators the ability to limit access to powerful user profiles and control access to sensitive databases and programs.
- **Automate Ops Console:** Use this to monitor and control your Automate Enterprise server resources, including workflows, tasks, processes, and agents.
- **Deployment Manager:** Use this to quickly and easily install, update, and license your HelpSystems products.
- **Password Self Help:** Use this to allow users to reset their own passwords without assistance from a help desk or system administrator.
- **Network Security:** Use this to monitor and control access to networked systems that are set up in Network Security.
- **Robot Network:** Use this to monitor the performance and statuses of your IBM i partitions, and respond to statuses (Reply, Escalate, Assign, and etcetera).
- **Robot Schedule:** Use this to monitor and manage the jobs that are set up in Robot Schedule.
- **Webdocs for IBM i:** Use this to go paperless by automating business processes and digitally managing the entire life cycle of your business information.

Click any of the links below to find out more about setting up Insite:

Dashboards

Settings (Admin)

Account (User)

Server Settings

Dashboards Overview

Each of the products that you can work with on HelpSystems Insite has a set of dashboards that display data from the systems that the server is connected to. You can create custom dashboards that show you the data you need to see, all on one screen.

Things to note:

- You can create more than one dashboard.
- You can view dashboards created in Insite 1.x by clicking on **Legacy Dashboards** from the Dashboard list page.
- Any combination of widgets can be used in the same dashboard. You can even use a mix of widgets from different products.
- 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.

See the following topics for additional information about Insite Dashboards:

Creating a Dashboard

You can create as many dashboards as you need to. Also, after you add a dashboard, you can change its layout and settings at any time by customizing it. See Customizing a Dashboard.

1. In the Navigation Pane, click **Dashboards**. If the menu is hidden, hover over the Navigation Pane to expand it.
2. Click **Add Dashboard** on the Dashboards page.
3. In the resulting panel, type a unique **Name**.
4. Type a **Description**.
5. In the Time section, toggle **Auto-Refresh** On or Off and enter the amount of minutes between automatic dashboard refresh.The default setting is 5 minutes.
6. Toggle **Business Hours** On or Off to define the business hours. If left turned off, this dashboard operates on a 24x7 basis.
7. Choose a **Default Time Range**. Choices are:
   - Last 60 Min
   - Last 24 Hours
   - Today
   - Today (Business Hours)
   - Yesterday
   - Yesterday (Business Hours)
   - Last 3 days
   - This Week
   - Past Week
8. Select from a list of **Users** to allow others to view this dashboard.
9. Select from a list of **Groups** to allow others to view this dashboard.
10. Click the **Guest** button to "On" to allow users who log on with the Guest profile to see this dashboard. The only thing Guest users can do is view dashboards marked as Guest. For more on the Guest profile, see Authentication.
11. Click **Save**.
12. Hover over the dashboard with **Edit Mode** set to On. You have the option of manually splitting your dashboard into widget panes by using the arrow icons OR you can click the **Select Quick Layout** button to select a predefined widget panel layout.

You are now ready to add widgets to your dashboard. See the user guide for your product or products for instructions on how to customize and use widgets.

Customizing a Dashboard

You can rename a dashboard, share it (or stop sharing), make it a Guest dashboard, and change the layout. However, you can only customize dashboards that you've created. Shared dashboards created by another user are view-only.

The easiest way to customize the look of the dashboard is to rearrange the widgets. However, keep in mind that if you're going to view this on a mobile device, the widgets will display in order by column (first, second, third).

To rearrange widgets:

1. Toggle **Edit mode** On when viewing your dashboard.
2. Hover over the widget you would like to move or split.
3. To split a widget, click on one of the arrow icons to split the widget pane in half in that direction.
4. To move a widget to a different pane, click on the Move icon. Then, click on the widget pane where you would like to move the widget. **Note**: If there is an existing widget in the target pane, that widget will be switched with the moving widget.

For other changes:

1. In the Navigation Pane, click **Dashboards**. If the menu is hidden, hover over the Navigation Pane to expand it.
2. Click the dashboard name.
3. Toggle **Edit mode** On.
4. Click the Edit button in the top left of the screen.
5. In the resulting panel, edit the **Name**.
6. Edit the **Description**.
7. In the Time section, toggle **Auto-Refresh** On or Off and enter the amount of minutes between automatic dashboard refresh. The default setting is 5 minutes.
8. Toggle **Business Hours** On or Off to define the business hours. If left turned off, this dashboard operates on a 24x7 basis.
9. Edit the **Default Time Range**.
10. Select from a list of **Users** to allow others to view this dashboard.
11. Select from a list of **Groups** to allow others to view this dashboard.
12. Click the **Guest** button to "On" to allow users who log on with the Guest profile to see this dashboard. The only thing Guest users can do is view dashboards marked as Guest. For more on the Guest profile, see Authentication.
13. Click **Save**.

Working with Dashboards

When working with dashboards the following options are available from the main dashboards panel.

In the Navigation Pane, click **Dashboards**. If the menu is hidden, hover over the Navigation Pane to expand it.

Selecting a Dashboard

If single or multiple dashboards exist and are available to your user profile, they are listed on the Dashboards main display.

Click on a dashboard to open the current layout of widgets for the selection.

Once open, a dashboard can be viewed to view the status of the data contained within the widgets that form the current layout or can be customized to change the settings and provide a different view.

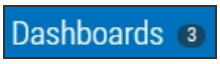
Refreshing Dashboards

Use the **Refresh** option to update this display with any new dashboards that have been added or shared with your user profile or group to which your user profile belongs, since this display was opened.

> **NOTE:** This option is different from the Refresh option from within the actual dashboard which updates the widget data.

Navigating through Dashboard pages

If you have created, or have access to, a large number of dashboards, it may be that the one that you want to view or edit is not visible on the first page of the dashboards panel display. The number of available dashboards is shown in the Header panel of this display.



> **NOTE:** The following options are not available if there are an insufficient number of dashboards to require additional pages.

Use any of the following options to navigate to a new page.

- Moves to the previous page of dashboards.
- Use the drop-down arrow to display a menu from which a page number can be selected.
- Moves to the next page of dashboards.

Searching for Dashboards

Searching for dashboards allows you to pinpoint a specific dashboard by **Name** and **Description**.

Start typing alphanumeric characters into the **Search** field to retrieve any dashboards that match the entered text.

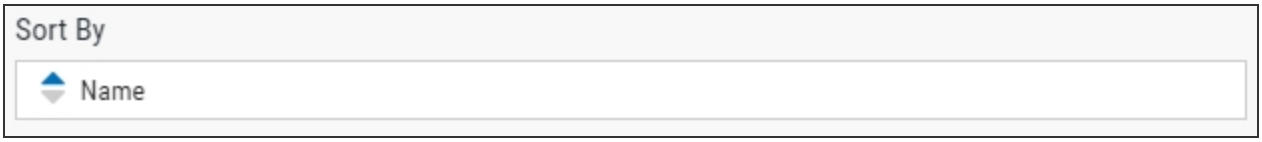
The search mechanism can be restricted to just **Name** or **Description** by specifying the Search settings.

Sort and Search settings

Click the **Settings** icon to set the sort and search options for dashboards.

Sort settings

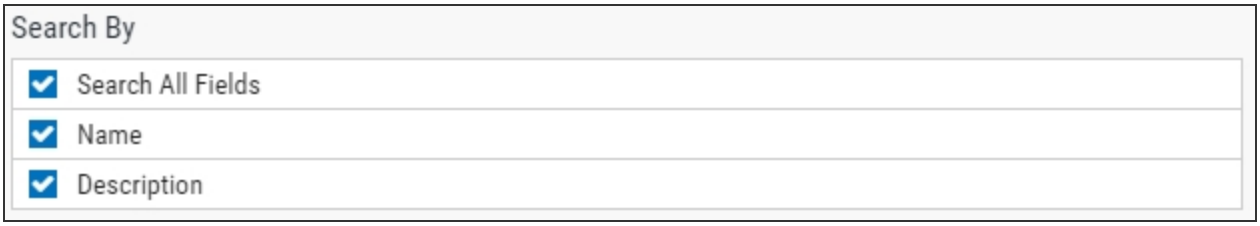
By default the dashboards are displayed on the page in ascending alphabetical name order (A first, Z last).



Click the **down** arrow to reverse the order to descending alphabetical name order. Click the **up** arrow to restore the sort order to the original default.

Search settings

When searching for dashboards, both the **Name** and **Description** fields can be used to locate the required dashboard. These are set to active by default.



To restrict the search to either by **Name** or by **Description**, click **Search All Fields** to remove the check marks from all options.

Click to select either the **Name** or **Description** option by which future searches are conducted.

Click the **Settings** icon to save the new search configuration.

Sharing Dashboards

Sharing a dashboard allows other users or groups to view the content.

Shared dashboards cannot be customized by anyone other than the original creator.

To share a dashboard:

1. Click the dashboard name.
2. In the Dashboard tool bar, toggle **Edit mode** On. The tool bar background color changes from blue to yellow.
3. Click the **Edit** button in the top left of the screen. The **Edit Dashboard** panel is displayed.

TIP: You can also click the **Show Actions** button for the dashboard and select **Edit Dashboard** from the pop-up menu.

4. In the **Share with** section of the **Edit Dashboard** panel, use the drop-down menu arrows to display a list of Users and/or Groups with which the dashboard can be shared.
5. Click on a **User** or **Group** to select them.
6. Click **Save** to confirm the new configuration.

TIP: Shared dashboards are shown on the main Dashboards display with a Shared caption applied underneath the number of widgets that the dashboard contains.

Allowing Guest access:

To provide Guest access to a dashboard, toggle the **Guest** button On to allow users who log on with the Guest profile to see this dashboard.

Viewing Shared Dashboards

Dashboards which have not been created by you but have been shared with your user profile either directly or as part of a group, can be viewed by clicking the Shared **Shared** icon on the Dashboards home page.

NOTE: You can only view a dashboard which has been shared with your user profile. You cannot amend any of the settings.

When viewing is complete, click the **Home** icon to return to the main dashboards display.

Duplicating Dashboards

Duplicating a dashboard is a quick way of creating a new dashboard with an existing layout that can then be customized to the new requirements.

To duplicate a dashboard:

1. Select the dashboard to be duplicated.
2. Click the **Show Actions** button and select **Duplicate Dashboard** from the pop-up menu.
3. Confirm the action when prompted.

The new dashboard is created with the same name as the dashboard from which it was duplicated but with the suffix (1) so it can easily be identified. The name can then be edited to a more unique name.

Setting a Dashboard as the Default Homepage

You can set a specific dashboard to open as the homepage each time that Insite is started. This may be useful if you have a dashboard that contains widgets showing the current status of all your critical services so that you can quickly determine any areas of concern that need addressing.

To set a dashboard as the default home page:

1. In the Navigation Pane, click **Account**. If the menu is hidden, hover the mouse pointer over the Navigation Pane to expand it.
2. From the drop-down menu, select **Preferences**.
3. In the Homepage section, select **Advanced Dashboards**.
4. Click **Look Up**. All the dashboards created by the current user profile are displayed in a new panel.
5. Select the dashboard you want to set as the homepage.
6. Click **Save**.

Each time Insite is now opened by this user profile, the selected dashboard is displayed as the home page.

Using Folders

Folders can be used within Insite to group together dashboards that have a common connection such as product type, health status, data source location, and so on.

Dashboards that are contained within folders can be viewed by clicking the Folders **Folders** icon on the main dashboards panel display and selecting the dashboard.

When viewing is complete, click the **Home** icon to return to the main dashboards display.

To add a folder:

1. From the main dashboards display click the down arrow in the top-right corner of the display and select **Add Folder**.
2. In the **New Folder** panel, type the unique name of the new folder and click **Save**.

To move a dashboard to a folder:

1. Select the dashboard to be moved.
2. Click the **Show Actions** button and select **Move To Folder** from the pop-up menu.
3. Select the folder to which the dashboard will be moved. The dashboard is now available from within this folder.

> TIP: To move the dashboard back into the main dashboard panel display, follow the above instructions but select **Home** as the folder to which the dashboard is moved.

To delete a folder:

1. From within the Folders view, select the folder to be deleted.
2. Click the **Show Actions** button and select **Delete Folder** from the pop-up menu.
3. Select the folder to be deleted and confirm the action when prompted.

Filter Settings

Applying a filter allows you change the time period over which the data in the dashboard widgets is

displayed.

To apply a Filter:

1. From the dashboard layout to which you want to apply the filter, click the **Filter** icon in the Dashboard tool bar. The Filter panel is displayed with the current time range selected.
2. Use the drop-down menu in this panel to select a new time range.
3. Click **Apply** to filter the new time range across ALL the widgets contained within the dashboard.
4. To return to the original time frame, either open the Filter panel again and select the original time period or close the dashboard and re-open it.

Manually Refreshing the Dashboard Data

By default, each dashboard is set to automatically refresh the widget data every 5 minutes.

If this setting has been turned off, or has been set to a greater time period, you may want to manually refresh the data to get an up-to-date visualization.

With the dashboard open, click Refresh to manually update the data in all widgets contained within the layout.

> **NOTE:** This option is different from the Refresh option available when the list of available dashboards is displayed.

Working with Layouts

Layouts are used in dashboards to define how widgets are displayed. A layout is split into sections, each of which houses a single widget. A layout can consist of a single section or as many sections as can be comfortably viewed on your display.

WARNING: The number of widgets on the dashboard affects the response time.

A layout can consist of widgets from multiple Insite products.

Quick Layouts

The easiest and commonest method of defining a layout for a dashboard, is to use the Quick Layout option. This is only available whenever a new dashboard is created and provides the fastest method of adding widgets.

To apply a quick layout:

1. With the new dashboard created and **Edit Mode** set to On, click the **Select quick layout** button.
2. From the **Select quick layout** panel, choose the layout that you want to apply to this dashboard. You can select a layout that contains between two and six widgets. The dashboard display changes to the selected layout.

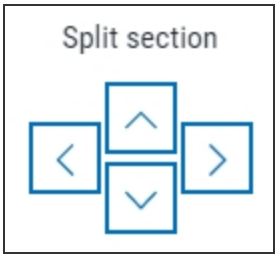
TIP: If you make a mistake you can use the Undo option to start again or manually change the layout by adding , removing or splitting the sections

You can now begin to add widgets to the sections, or modify the layout to your own requirements.

NOTE: When using the following options, the section in which the mouse pointer is currently situated is considered to be the 'live' section to which any changes apply.

Splitting Sections

The Split section option is used to add sections to the current layout. Click a direction arrow to split the section in whichever direction is represented by the arrow that is clicked.



You can add as many sections to the layout as you wish using this method.

Deleting Sections

If a section becomes surplus to requirements, it can be deleted from the layout by clicking the **Delete**

icon. This is displayed in the top right-hand corner of the section you want to remove.

> WARNING: You are not prompted to confirm the deletion. Once clicked, the section is removed from the layout.

Moving Sections

Once created, sections can be moved around the layout to a new position.

Click the **Move** icon. This is displayed in the top left-hand corner of the section you want to move.

When moving a section, it actually trades places with the section that is currently in the position to which the selected section is being moved. As a result, the section being moved takes on the size properties of the section with which it is swapping position. This is important to bear in mind, particularly when moving a section containing a widget displaying a large amount of visual data into a smaller section. A warning is displayed if the section is deemed too small to accommodate the widget data.

Stretching and Shrinking Sections

Individual sections within the layout can be resized by using the stretch or shrink technique. As a result, other sections in the layout shrink or expand to accommodate the new size.

To use stretch and shrink:

1. Position the pointer over either the vertical or horizontal dividing bars between the panel. The pointer changes to a 'Move Border' shape or dependent on the direction in which the section is being resized.

2. Hold the left mouse button down and drag the border in the direction that you want to resize.

3. Release the mouse button when the desired position is reached.

Undo and Redo options

If you make a mistake when splitting, moving or deleting a section you can use the Undo option from the Edit Dashboard tool bar.

Click **Undo** to reverse the last change made to the dashboard layout. You can continue to use the Undo option as far back as the first change made when the dashboard entered the current Edit Mode session.

Click **Redo** to reverse the last use of the Undo option.

Deleting a Dashboard

You can delete one or more dashboards at the same time. However, you can only delete dashboards that you've created. Shared dashboards created by another user are view-only.

1. In the Navigation Pane, click **Dashboards**. If the menu is hidden, hover over the Navigation Pane to expand it.
2. Select (check) the dashboards to delete.
3. Click **Delete**.
4. Click **Delete** again to confirm.

Viewing Legacy Dashboards

If you have dashboards that were created in Insite 1.x, you can view these dashboards from the main Dashboards page.

1. In the Navigation Pane, click **Dashboards**.
2. Click on the expand button next to the **Add Dashboard** button to view the options menu.
3. Click **Legacy Dashboards**.
4. Search for your legacy dashboard. Click to open.

Dashboard Widgets

Widgets are visual representations of individual items of Health and Performance metric data extracted from Data sources and Business Assets that you have configured on the system to which you are connected.

Widgets are added to a dashboard layout which can be customized to provide a unique, at-a-glance, real-time view of your business.

The following widget types are available in Insite

- **Chart.** The Chart widget displays data from the selected datasource and business metric combination in the form of a chart based on an 'X' and 'Y' axis.
- **Status.** The Status widget displays a colored, graphical representation of the current status of the selected datasource asset.
- **List.** The List widget displays a list of data for the selected datasource asset.
- **Key Indicator.** The Key Indicator widget is used to display summarized data of an important business asset.
- **Title.** The Title widget is used to display your company's branding to be able to share the contents on a big screen, to the higher business levels and in reports or presentations.

You can add as many widgets as you need to your dashboard. For many of the widgets, you can even add more than one of each kind. But, be aware that number of widgets on the page does affect the response time. Also, you can only add widgets to dashboards that you've created. Shared dashboards created by another user are view-only.

To add widgets:

1. In the Navigation Pane, click **Dashboards**. If the menu is hidden, hover over the Navigation Pane to expand it.
2. Click the dashboard name.
3. Toggle **Edit mode** On.
4. Put focus on an empty dashboard pane and Click **Add widget**.
5. In the resulting panel, Add a new Data Source by selecting a connection and product OR choose an existing Data Source OR create the widget with no Data Source.
6. Choose the Asset you would like included in the widget.
7. If desired, edit the Widget **Name**.
8. Select a **Widget type**.

   > NOTE: The Widget types available will vary depending on your choice of Asset.

9. Select the metrics to be displayed in the widget (if applicable).
10. Edit Widget Settings as desired.

    > NOTE: The Widget Settings available will vary depending on your choice Data Source, Asset, and Widget type. See Advanced Settings for more information.

11. Click **Save**.

> **NOTE:** If you want to add more than one widget of a particular type, for example, if you want to add two job history widgets, repeat the above steps for each one.

12. Customize the widgets you added. With **Edit mode** On, Click **Edit Widget** on any widget to edit its settings.

Adding and Editing Widgets

You can add as many widgets as you need to your dashboard. For many of the widgets, you can even add more than one of each kind. But, be aware that number of widgets on the page does affect the response time. Also, you can only add widgets to dashboards that you've created. Shared dashboards created by another user are view-only.

To add/edit widgets:

1. In the Navigation Pane, click **Dashboards**. If the menu is hidden, hover over the Navigation Pane to expand it.
2. Click the dashboard name.
3. Toggle **Edit mode** On.
4. If you wish to add a new widget, put focus on an empty dashboard pane and Click **Add widget**. If you wish to edit an existing widget, put focus on the widget and Click **Add widget**.
5. In the resulting panel, add/edit a Data Source by selecting a connection and product OR choose an existing Data Source OR create the widget with no Data Source.
6. Choose the Asset you would like included in the widget.
7. If desired, edit the Widget **Name**.
8. Select a **Widget type**.

   > **NOTE:** The Widget types available will vary depending on your choice of Asset. See the user guides for the specific products for more information.

9. Select the metrics to be displayed in the widget (if applicable).
10. Edit Widget Settings as desired.

    > **NOTE:** The Widget Settings available will vary depending on your choice of Data Source, Asset, and Widget type. See Advanced Settings for more information.

11. Click **Save**.

    > **NOTE:** If you want to add more than one widget of a particular type, for example, if you want to add two job history widgets, repeat the steps above for each one.

12. Customize the widgets you added. With **Edit mode** On, Click **Edit Widget** on any widget to edit its settings.

Assets

Assets are the business services, processes and applications that have been configured, for which you can generate a visual representation within Insite via a widget.

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.

Assets are initially displayed at their highest level of configuration. Click **Expand** to drill-down into the asset. The drill-down process is available for every asset level against which the **Expand** icon is displayed.

> **NOTE:** See help for the Insite product you are using for product-specific Asset information.

Searching For Assets

If the Data Source for which you are creating the widget contains a large number of assets, it may be quicker to use the **Search** facility to find a starting point, rather than expanding multiple asset entries to locate the one that you require.

In the **Search assets** field at the top of the **Assets** section, type the name of the asset you want to locate and press `Enter`. The text is not case-sensitive. Any Assets that match the entered text are now displayed and can be selected or expanded as required.

Data Sources

Data Sources are the instances of products within Insite to which you have made a connection.

> **NOTE:** Dashboards can include widgets from multiple Data Sources. They do not need to contain widgets that report data from the same Insite product.

Selecting a Data Source

When adding a widget, you are first prompted to select the Data Source from which the information is generated.

Selecting an Existing Data Source

If you have previously added widgets to the dashboard, the Data Source and Business Asset from which the widget was created are available for selection. Use the drop-down menu option **Select Existing Data Source**. This is useful if you want to display the same data using two different widget types.

Adding a new Data Source

If no widgets currently exist for this Data Source or you want to create a new widget, you can select a new Data Source. These are displayed as Product Connections in the **Add New Data Source** section. You can then select a Business Asset from those available in the Assets section.

The Expand symbol preceding a Data Source identifies additional Data Sources that are running on the listed entry.

Creating a Widget without a Data Source

Creating this type of widget allows you to add a title, subtitle and/or Company logo to give your dashboard a professional and personalized look.

For the purposes of adding a title, logo, or other static information to a widget, select the **Create widget with no data source** option from the **Select Existing Data Source** menu option.

Widget Advanced Settings

Some Data Sources will give you the option of specifying advanced settings for your widget. The advanced settings available for each widget will depend on the type of widget selected. See below for advanced settings definitions by widget type:

Key Indicator

Auto-Refresh

You can change the default refresh rate by turning this setting to **Custom** and enter the number of minutes to wait until the next refresh, or keep this setting at **Inherit** to have your widget's refresh rate be the same as the parent dashboard.

Header

You can use this setting to hide or show the widget header. The default is to show.

Title

You can use this setting to hide or show the widget Title. The default is to show.

Indicator

Use this setting to change the value of the indicator shown. The default is 'Last value in the period'.

Chart

Auto-Refresh

You can change the default refresh rate by turning this setting to **Custom** and enter the number of minutes to wait until the next refresh, or keep this setting at **Inherit** to have your widget's refresh rate be the same as the parent dashboard.

Non-Value Axis

Use this setting to change the value displaying in the Non-Value Axis.

Layout

You can change the type of chart displaying your widget data. The default is to Line. Other possible values are: Bar, Area, and Column.

Header

You can use this setting to hide or show the widget header. The default is to show.

Title

You can use this setting to hide or show the widget title. The default is to show.

Legends

You can use this setting to hide or show the widget legends. The default is to show.

Grid Lines

You can use this setting to hide or show the widget grid lines. The default is to show.

Thresholds
You can use this setting to hide or show the widget thresholds. The default is to show.

Axis Labels
You can use this setting to hide or show the widget axis labels. The default is to show.

Axis Label
Use this setting to change the chart axis label. Change setting to **Custom** and enter a new label to change.

Axis Unit Label
Use this setting to change the chart axis unit label. Change setting to **Custom** and enter a new label to change.

Axis Range
Use this setting to change the chart axis range. Change setting to **Custom** and enter a new range to change.

List

Auto-Refresh
You can change the default refresh rate by turning this setting to **Custom** and enter the number of minutes to wait until the next refresh, or keep this setting at **Inherit** to have your widget's refresh rate be the same as the parent dashboard.

Grouping field
Use this setting to change the field that the data is grouped by from the dropdown list of available fields.

Header
You can use this setting to hide or show the widget header. The default is to show.

Title
You can use this setting to hide or show the widget Title. The default is to show.

Column Order and Default Sorting
Use this setting to change the order in which the selected fields are displayed in the widget and the desired sort order within each field (Ascending or Descending). You can also delete out selected fields from the display.

Status

Auto-Refresh
You can change the default refresh rate by turning this setting to **Custom** and enter the number of minutes to wait until the next refresh, or keep this setting at **Inherit** to have your widget's refresh rate be the same as the parent dashboard.

Header
You can use this setting to hide or show the widget header. The default is to show.

Title

You can use this setting to hide or show the widget Title. The default is to show.

Title

Title

Enter the title of your widget in this field.

Subtitle

Enter the subtitle of your widget in this field.

Text Align

You can use this setting to display your widget text as left-aligned, right-aligned, or centered.

Background Options

You can use this setting to upload an image as your widget background or select a solid color background.

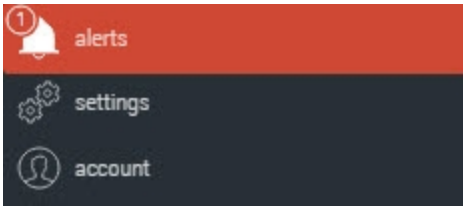
HelpSystems Insite Settings

The following topics cover information on Insite's Alerts, Admin Settings, and Account Settings.

Alerts

Overview

HelpSystems Insite has an automatic alert system that notifies you when an event happens that prevents you from getting data from your connected systems. When such events occur, you'll see Alerts highlight and vibrate in the Navigation Pane.



> **NOTE:** If the Navigation Pane is hidden, click .

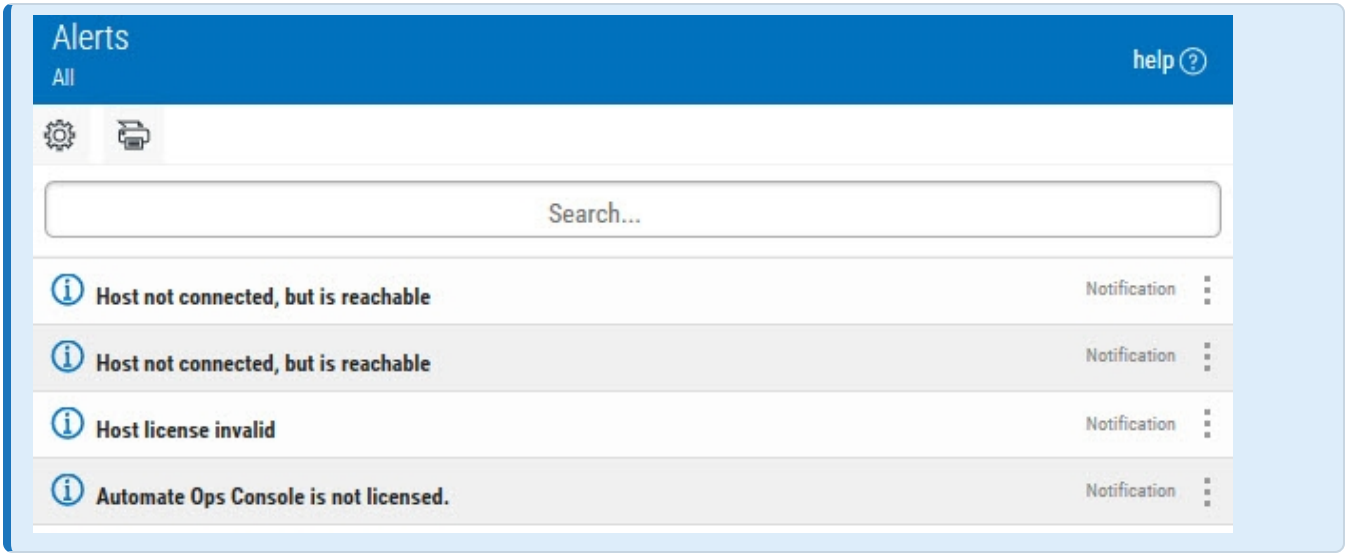
Responding to Alerts

If you're notified about an alert, you can respond immediately and either view or fix it.

To respond to an alert:

1. Click **Alerts** to open the Alerts page.
2. Some events may not need attention, or they may require a fix that's outside of the Insite application. If the event is something that must be dealt with and it can be fixed within the Insite application, click **Show Actions**, then choose **Fix**. The page opens where you can fix the issue.

> **EXAMPLE:**
> If you received a notification that one of your products isn't licensed (like Automate Ops Console in the image below), you should click **Show Actions**, then choose **Fix**. Doing so would take you to the Automate Ops Console Home page, where you could add a product license.



Sorting and Filtering Alerts

Depending on how many alerts you have at a time, you may want to sort and filter them.

Click **Settings** to open the sorting and filtering options:

- You can choose to sort your alerts by Alert or Date.
- You can choose to filter your alerts by Messages or Notifications.

> **NOTE:** A message is an alert that can be fixed. A notification is an alert that can only be viewed.

Use the Search bar to quickly find an alert by description.

Settings

The Settings option in the Navigation Pane gives you access to your product and system connections, Insite user authentication, configuration for logging levels, setup for roles and security groups, and your users and default profiles.

Getting There: In the Navigation Pane, click **Settings**. If the menu is hidden, click .

> **NOTE:** Only the Insite admin user can access this page.

Click a link below to learn more about each section.

Product Connections

> **NOTE:** Only a user with administration permissions can access this page.

Getting There: In the Navigation Pane, click **Getting Started** under Settings, then click **Product Connections**. If the menu is hidden, click .

Currently, HelpSystems Insite has modules available for the following products:

- Access Authenticator
- Alignia
- Authority Broker
- Automate Ops Console
- Deployment Manager
- Password Self Help
- Network Security
- Robot Network
- Robot Schedule
- Webdocs for IBM i

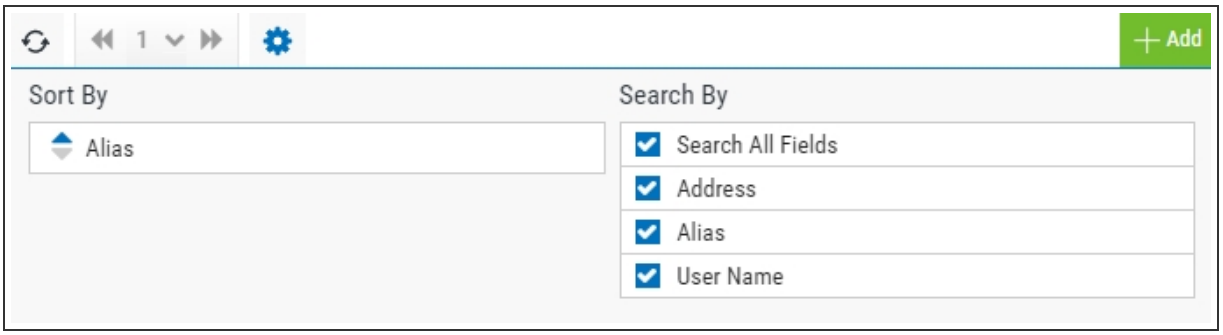
However, before you can begin using the above modules, you have to create connections between Insite and your IBM i and Automate Enterprise servers that have those products installed on them. You do that from the Product Connections page.

This page shows which connections have been made between Insite and your IBM i and Automate Enterprise servers. For each connected system, you can see which products are installed on it. You can also connect and disconnect the IBM i and Automate Enterprise servers via this page.

Sorting and Searching Your Product Connections View

There are settings for the Product Connections page that allow you to choose how to sort the list and decide what data will be searched.

1. Click **Settings**.
2. Select how to sort the list of connections (Sort By). Click your selection again to change the sort order to ascending or descending.
3. Select what you want to use when searching for connections. You can choose to **Search All Fields**, or to search by **Address**, **Alias**, or **User Name**.
4. Click **Settings** to close the settings.



Adding a New Product Connection

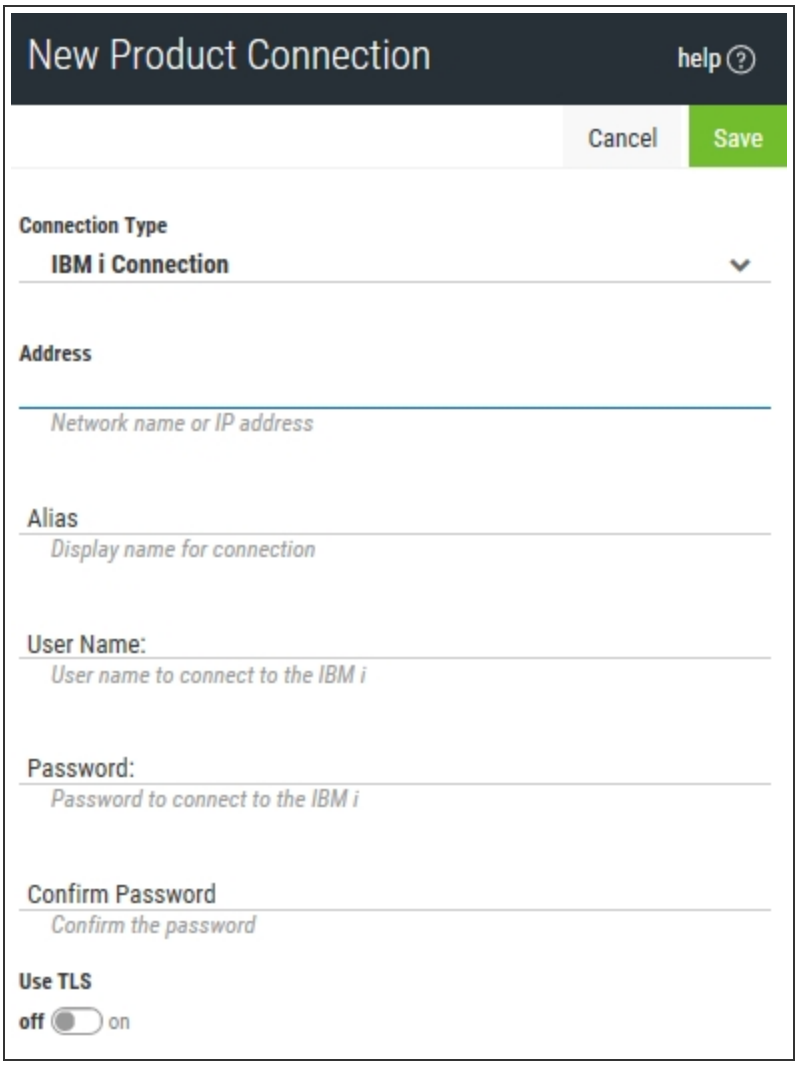
In order to use the HelpSystems Insite modules, you must connect Insite to one or more of your IBM i systems that have those products installed on them, to one or more of your Automate Enterprise servers, or to one or more of your Webdocs for IBM i systems.

This is one of the tasks that must be done before anyone can use the Insite modules. For a list of the available modules, see Welcome to HelpSystems Insite.

> **NOTE:** In order to use TLS security to encrypt an IBM i Product Connection you must first configure a digital certificate, which contains the server's public encryption key. See Securing an IBM i Product Connection.

Follow these steps to define a connection:

1. In the Navigation Pane, click **Settings**.
2. Click **Product Connections**.
3. Click **Add**.
4. Select a **Connection Type**. You can choose an IBM i, Automate Enterprise server, or Webdocs for IBM i connection.
5. If you chose an IBM i connection:
   a. Enter the IP **Address** (or network name) of the IBM i system you want to connect to.



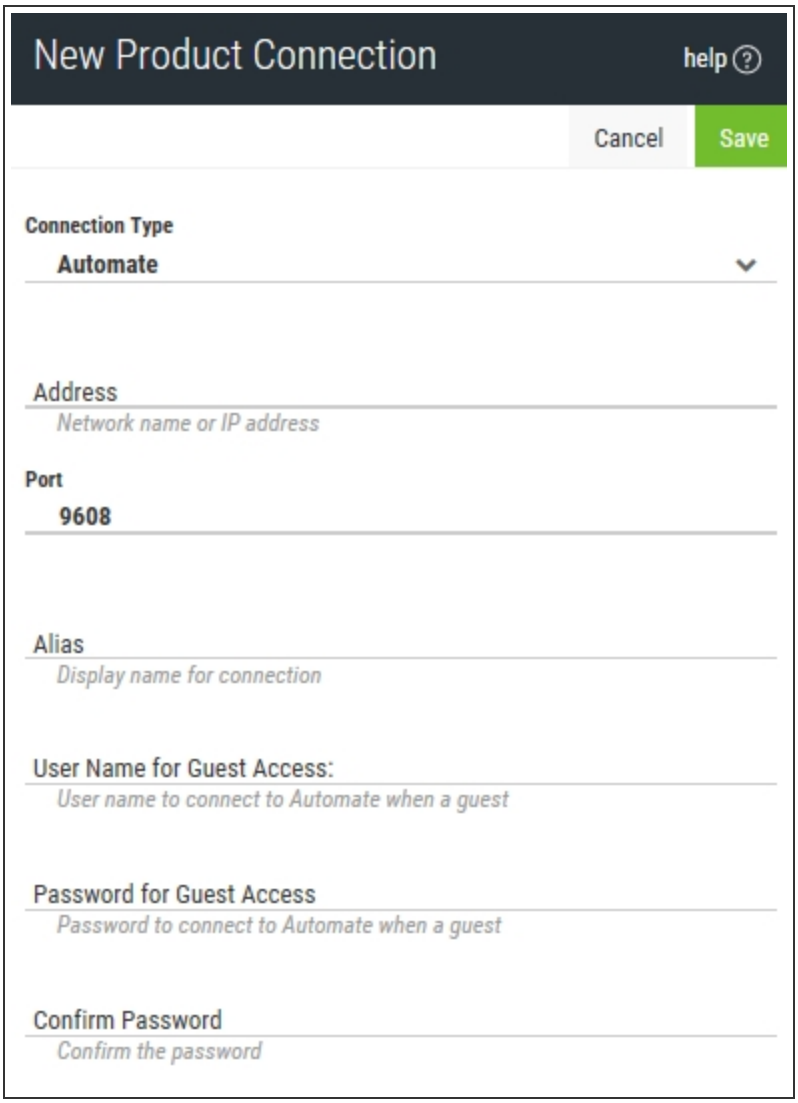
b. Enter an **Alias** for the IBM i system. This is what displays throughout Insite.

c. Enter the **User Name** and **Password** (and **Confirm Password**) for a user on the system you entered above.

> NOTE: You will not necessarily log on to the Insite as this user (unless you choose to). This is just the user that allows the connection to be made to the IBM i. Therefore, the user you choose must have QSECOFR or equivalent authority so that Insite can gather the information it needs.

6. If you chose an Automate Enterprise server connection:

   a. Enter the IP **Address** (or network name) of the Automate Enterprise server you want to connect to.



b. Enter the **Port** number for the server.

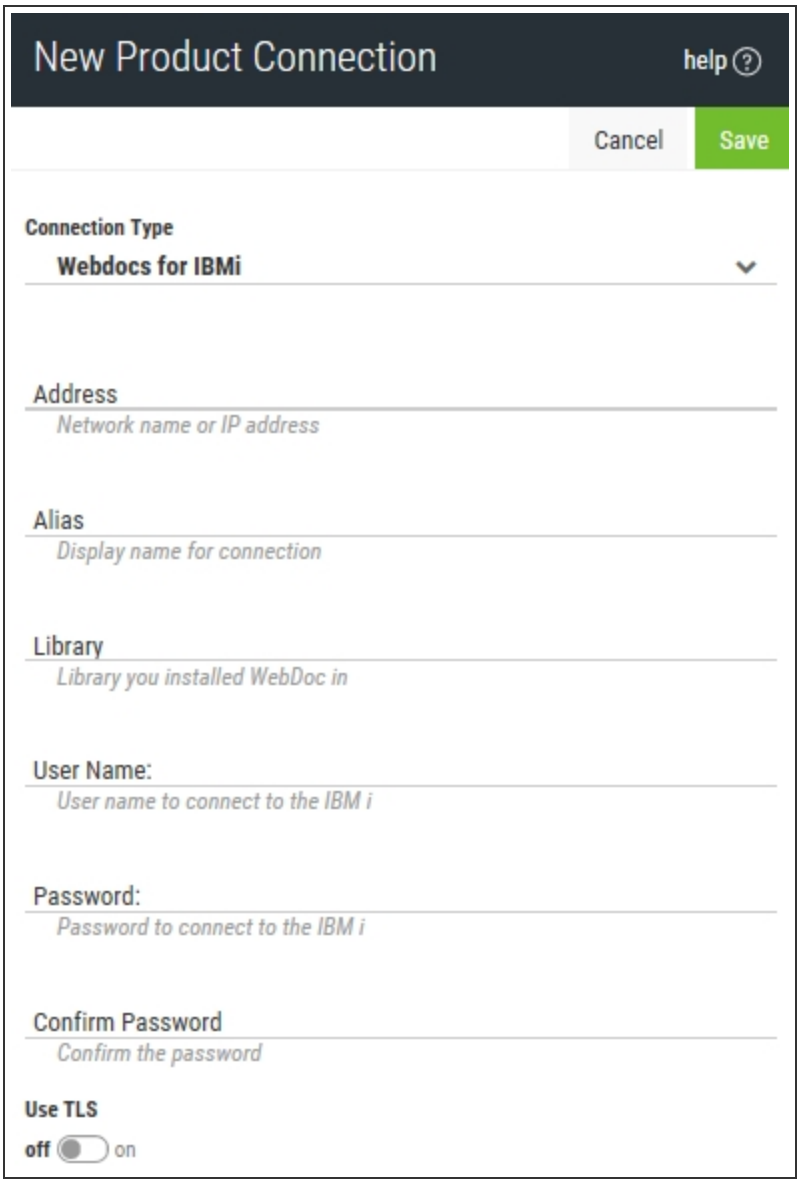
c. Enter an **Alias** for the server. This is what displays throughout Insite.

d. Enter a **User Name for Guest Access** and **Password for Guest Access** (and **Confirm Password**) for a user who would log on as a guest on the system you entered above.

> NOTE: You will not necessarily log on to the Insite as this user (unless you choose to). This is just the user that allows the connection to be made to the Automate Enterprise server.

7. If you chose a Webdocs for IBM i connection:

   a. Enter the IP **Address** (or network name) of the Webdocs IBM i system you want to connect to.



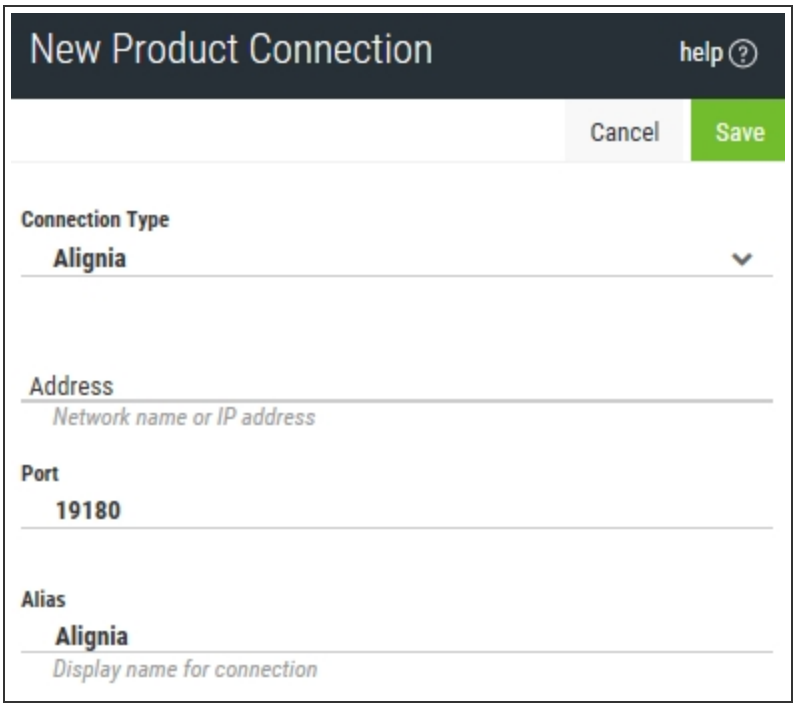
b. Enter an **Alias** for the Webdocs IBM i system. This is what displays throughout Insite.

c. Enter a **User Name for Guest Access** and **Password for Guest Access** (and **Confirm Password**) for a user who would log on as a guest on the system you entered above.

> **NOTE:** You will not necessarily log on to the Insite as this user (unless you choose to). This is just the user that allows the connection to be made to the Webdocs IBM i system.

8. If you chose an Alignia connection:

   a. Enter the IP **Address** (or network name) of the Alignia system you want to connect to.



b. Enter a **Port** number.

c. Enter an **Alias** for the Alignia system. This is what displays throughout Insite

9. If you are configuring an IBM i or WebDocs for IBM i connection, turn Use SSL on to use TLS security to encrypt the connection. If you do this, you will first need to have configured a Certificate. See Securing an IBM i Product Connection for details.
10. Click **Save**.

Connecting to and Disconnecting from a Server

On the Product Connections page, you can see at a glance which servers have active connections to HelpSystems Insite (they'll have a green check mark).

You can temporarily disconnect any system (without completely removing the connection) and then reconnect it again when needed. After disconnecting or reconnecting servers, you may need to refresh the page to see your changes.

To disconnect one or more servers

1. In the Navigation Pane, click **Settings**.
2. Click **Product Connections**.
3. *To disconnect one server:*

   Click **Show Actions** at the end of the row for that server. Then, click **Disconnect**.

   To disconnect more than one server:

   Select (check) the servers. Then, click the **Disconnect** button.

To reconnect one or more servers

1. Click **Admin Settings** under Server Settings.
2. Click **Product Connections** on the Administration Settings page.
3. *To connect one server:*

   Click ⋮ **Show Actions** at the end of the row for that server. Then, click **Connect**.

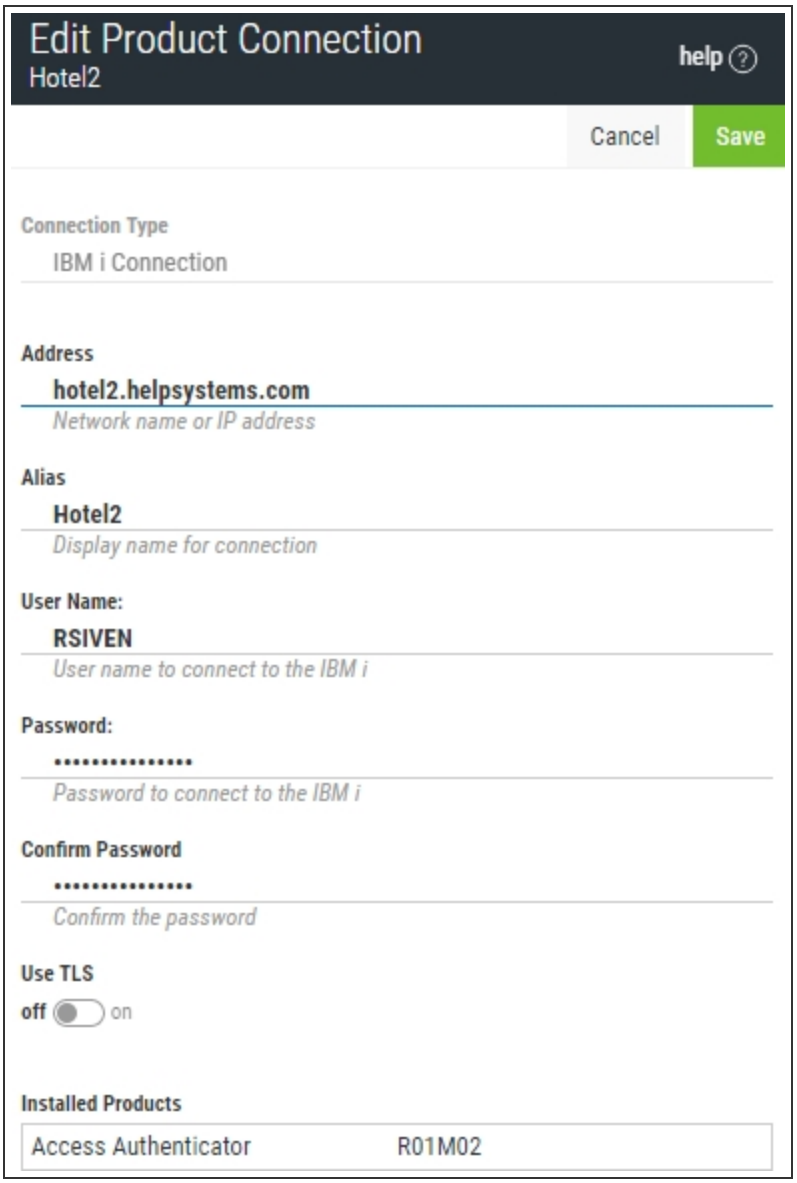
   To connect more than one server:

   Select (check) the servers. Then, click the **Connect** button.

Editing an Existing Product Connection

Follow these steps to edit the definition for an IBM i, Automate Enterprise server, or Webdocs IBM i connection:

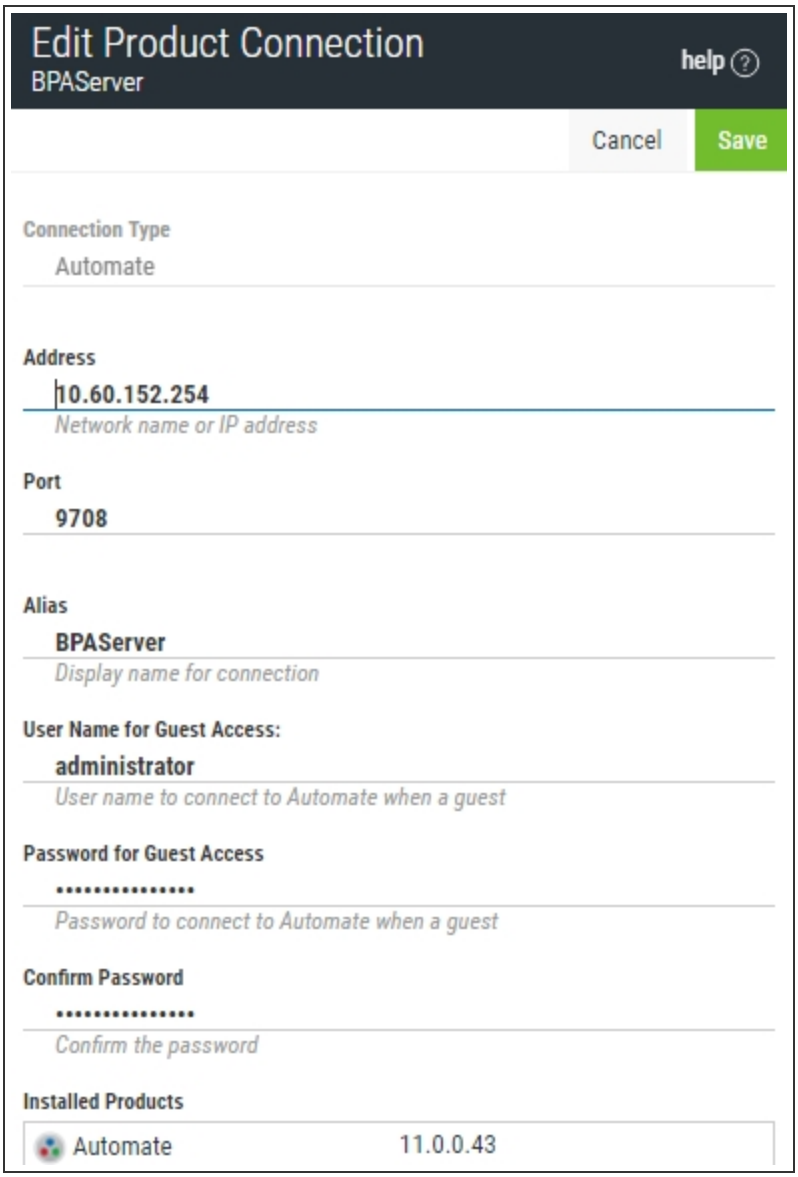
1. In the Navigation Pane, click **Settings**.
2. Click **Product Connections**.
3. Click the name of the system you need to edit. The page that opens shows the current definition and a list of the HelpSystems products installed on that system along with their versions.
4. If you chose an IBM i connection:



a. Enter the IP **Address** (or network name) of a different IBM i system, if necessary.
b. Enter a different **Alias** for the IBM i system. This is what displays throughout Insite.
c. Enter the **User Name** and **Password** (and **Confirm Password**) for a user on the system you entered above.

> NOTE: You won't necessarily log on to HelpSystems Insite as this user (unless you choose to). This is just the user that allows the connection to be made to the IBM i. Therefore, the user you choose must have QSECOFR or equivalent authority so that Insite can gather the information it needs.

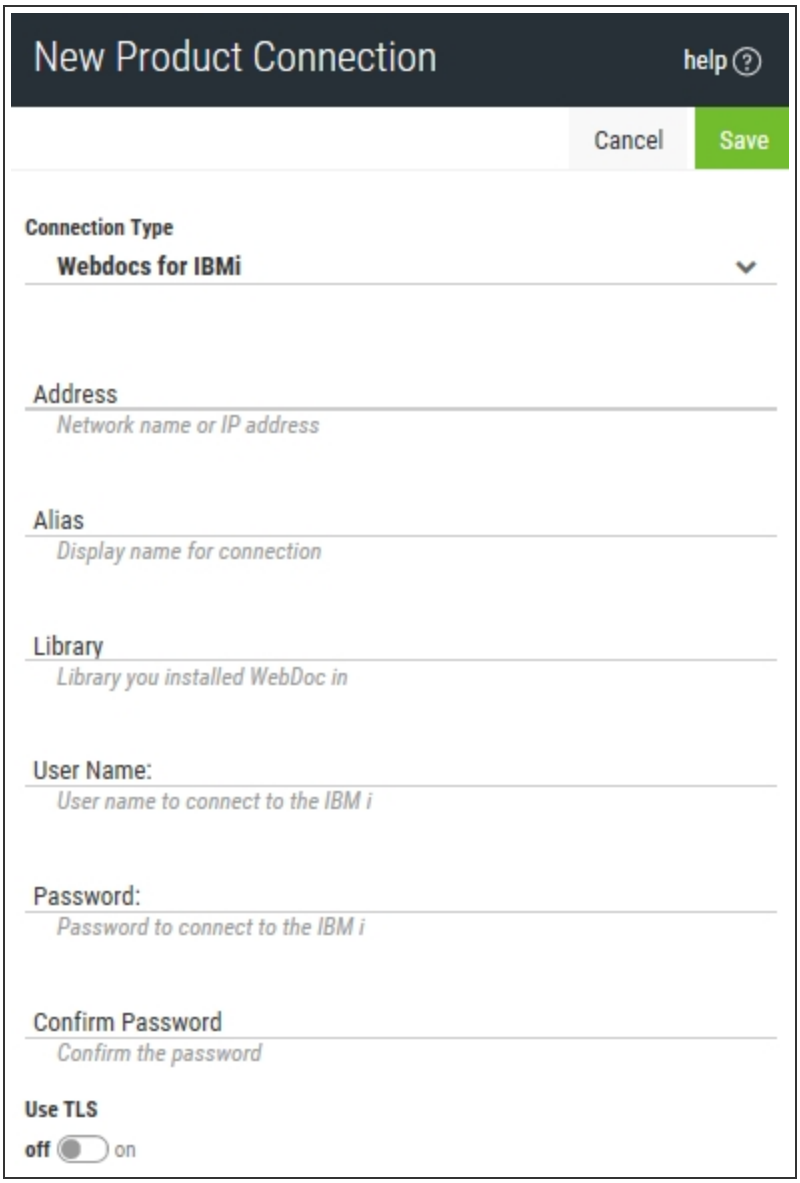
5. If you chose an Automate Enterprise Server connection:



a. Enter the IP **Address** (or network name) of a different Automate Enterprise server, if necessary.
b. Enter a different **Port** number for the server.
c. Enter a different **Alias** for the server. This is what displays throughout Insite.
d. Enter a **User Name for Guest Access** and **Password for Guest Access** (and **Confirm Password**) for a user who would log on as a guest on the system you entered above

> NOTE: You will not necessarily log on to the Insite as this user (unless you choose to). This is just the user that allows the connection to be made to the Automate Enterprise server.

6. If you chose a Webdocs for IBM i connection:
   a. Enter the IP **Address** (or network name) of a different Webdocs IBM i system, if necessary.



b. Enter a different **Port** number for the system.

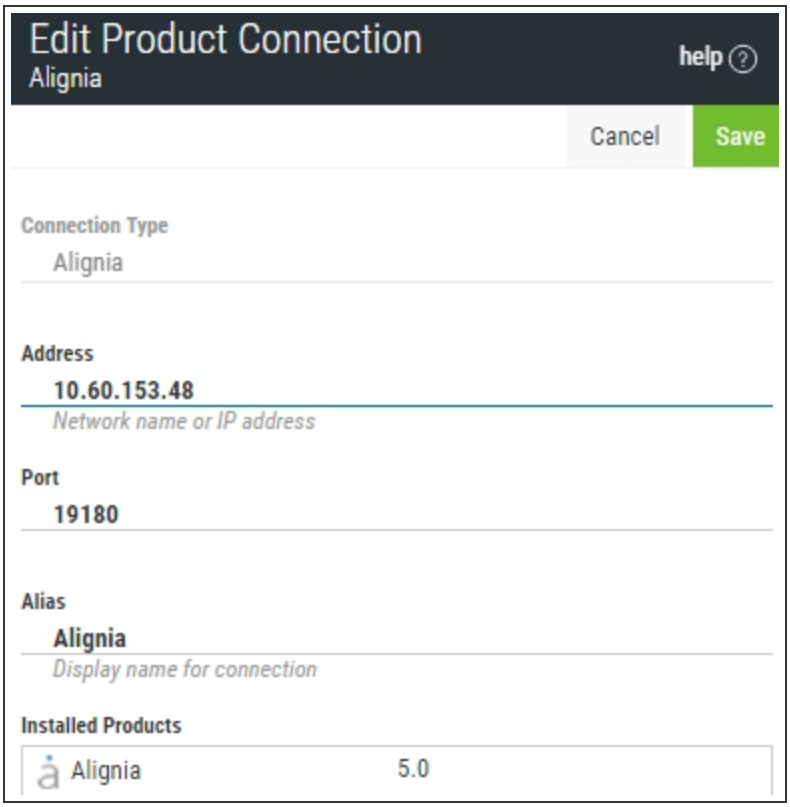
c. Enter a different **Alias** for the system. This is what displays throughout Insite.

d. Enter a **User Name for Guest Access** and **Password for Guest Access** (and **Confirm Password**) for a user who would log on as a guest on the system you entered above.

> NOTE: You will not necessarily log on to the Insite as this user (unless you choose to). This is just the user that allows the connection to be made to the Webdocs IBM i system.

7. If you chose an Alignia connection:

   a. Enter the IP **Address** (or network name) of a different Alignia system, if necessary.



b. Enter a different **Port** number for the system.
c. Enter a different **Alias** for the system. This is what displays throughout Insite.

8. Click **Save**.

Deleting a Product Connection

This severs the connection between HelpSystems Insite and the IBM i, Automate Enterprise server, or Webdocs IBM i system. If you ever need to reconnect, you'll need to add the connection again, and all users will need to reassign their profiles.

If you want to temporarily disconnect from the IBM i, Automate Enterprise server, or Webdocs IBM i system instead of removing the connection entirely, see Connecting to and Disconnecting from a Server.

To delete a connection

1. In the Navigation Pane, click **Settings**.
2. Click **Product Connections**.
3. Select (check) one or more connections to delete.
4. Click **Delete**.
5. Click **Delete** when asked to confirm the deletion.

WARNING: Products licensed by an Enterprise License Agreement (via Deployment Manager for Insite) are tied to the Product Connections you've set up. If you delete a Product Connection, be aware that any ELA-licensed products on the deleted system will be immediately unlicensed. You will, however, be asked for confirmation through the Remove Product Connection screen before the licenses are removed.

Securing an IBM i Product Connection

In order to use TLS security to encrypt an IBM i Product Connection from Insite, you must create and configure a Digital Certificate (also called a *Certificate Authority*). To do so requires the following steps:

- **Create a Certificate.** Use IBM's Digital Certificate Manager to create the Certificate.
- **Export the Certificate.** Export the Certificate from the Digital Certificate Manager.
- **Import the Certificate.** Import the Certificate into your Java Runtime Environment.

Creating a Certificate

1. Open the Digital Certificate Manager by going to http://*your server name*:2001/QIBM/ICSS/Cert/admin/qycucm1.ndm/main0.

   EXAMPLE:
   http://myservername:2001/QIBM/ICSS/Cert/admin/qycucm1.ndm/main0

   NOTE:
   To open this URL, the http server must be running on your IBM i system. To start the http server, use the following command:

   ```
   STRTCPSVR SERVER(*HTTP) HTTPSVR(*admin)
   ```

2. Click **Create a Certificate Authority (CA)** on the left side menu.
3. Enter the requested information and click **Continue**.
4. For 'Install Local CA Certificate,' review the text and click **Continue**.
5. For 'Certificate Authority (CA) Policy Data,' verify information and click **Continue**.
6. On the 'Policy Data Accepted' screen, click **Continue** again.
7. On the Create a Server or Client Certificate screen, you are prompted to create the Certificate store *SYSTEM. Enter the requested information and click **Continue**.
8. Select applications that should trust the Certificate Authority and click **Continue**.
9. Continue to create an Object Signing Certificate if desired (not required).

Exporting the Certificate from the Digital Certificate Manager

1. Open the Digital Certificate Manager by going to http://*your server name*:2001/QIBM/ICSS/Cert/admin/qycucm1.ndm/main0.
2. Click **Select Certificate Store**.
3. Select ***SYSTEM** and click **Continue**.
4. Enter the Certificate store password and click **Continue**.

5. Select **Manage Certificate** on the left, and then **Export Certificate**.
6. Select **Certificate Authority**, then click **Continue**.
7. Select the Certificate Authority you created and click **Export**.
8. Select File and click **Continue**.
9. Enter a file path for the IBM i IFS and click **Continue**.
10. Download the file from the IBM i onto the system running Insite (e.g. via FTP).
    a. Using a command prompt, open an FTP connection to the IBM i system using 'ftp systemname' (cmd (Windows) or bash/shell (Linux)).
    b. Enter credentials to login if prompted.
    c. Once logged in, enter `quote site namefmt 1`.
    d. To copy the file, enter `GET /path/to/file/system.crt`. The file will be copied to the folder you are in within the command prompt.

Importing the Certificate Authority into Java Runtime Environment (Windows)

1. Open a command prompt in java 'bin' folder.
   `cd "c:\Program Files (x86)\Help Systems\HelpSystems Insite\jvm\bin"`
2. Run

```
keytool -import -alias Server Alias -file Certificate Path -
keystore Keystore Path
```

EXAMPLE:

```
keytool -import -alias HS55 -file c:\helpsys\insitecert_HS55 -
keystore "C:\Program Files (x86)\Help Systems\HelpSystems
Insite\jvm\lib\security\cacerts"
```

3. Enter the keystore password, "changeit" by default.
4. Type `yes` and press **Enter**.
5. Restart the Insite server

After completing these steps, see Adding a New Product Connection in order to add a new connection in Insite.

NOTE: For more information regarding the IBM Digital Certificate Manager, see Digital Certificate Manager (DCM) - Frequently Asked Questions and Common Tasks.

Authentication

The Authentication page is only accessible to a user with administrative permissions. It allows you to set the session timeout, define the authentication method, and enable guest logins.

Getting There: In the Navigation Pane, click **Authentication** under Settings. If the menu is hidden, click .

You can do the following:

Set the session timeout limit

You can set the number of minutes a session can remain inactive before timing out.

> **NOTE:** If the timeout limit set here is greater than what a user sets for the auto-refresh intervals for dashboard widgets or in their preferences (for items such Schedule Activity or the Status Center), it will prevent the user's session from timing out if they're on one of those pages.

Select the authentication method you want to use and set it up

Before any of your users can log on to Insite, you must specify how to authenticate users. You can choose to authenticate your users against an LDAP server, one of your IBM i systems, one of your Automate Enterprise servers, or one of your Webdocs for IBM i systems.

Enable a guest login

A guest profile allows you to give people access to the dashboards that are marked as Guest. The Guest profile is for people who normally don't log onto the product and who may not even have an IBM i, Automate Enterprise server, or Webdocs IBM i profile. Guest users can only access the Dashboard area and view only those dashboards designated as Guest. They cannot access any other part of Insite, see any other dashboards, or make any changes.

The default Guest profile credentials are: User Name = guest, Password = guest. However, you can change it, if necessary. All guests use the same guest profile.

To complete the above tasks:

1. In the Navigation Pane, click **Authentication** under Settings. If the menu is hidden, click .
2. Enter the **Session Timeout** in minutes.

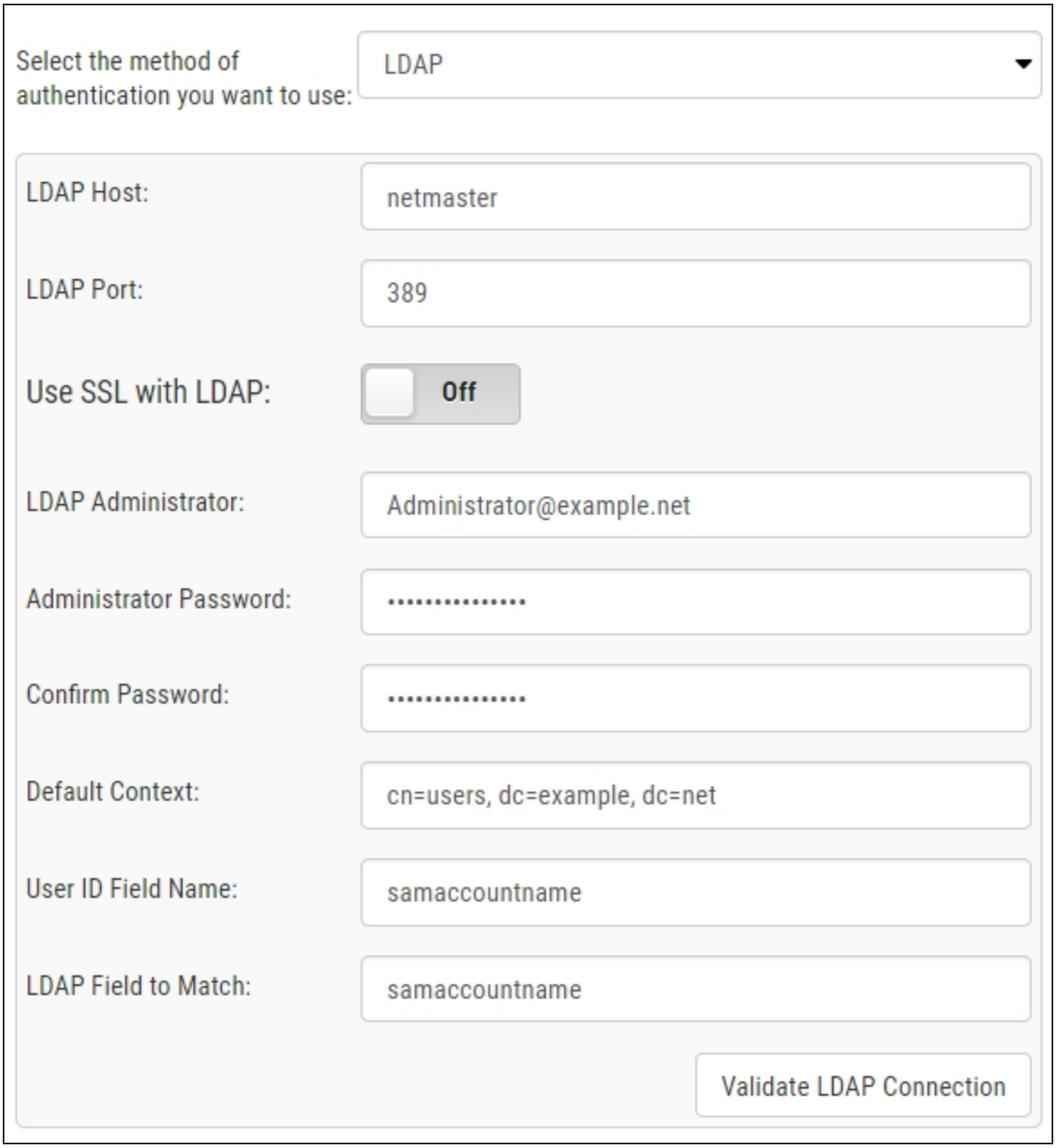
   > **NOTE:** If the timeout limit set here is greater than what a user sets for the auto-refresh intervals for dashboard widgets or in their preferences (for items such Automate Activity, Schedule Activity, or the Status Center), it will prevent the user's session from timing out if they're on one of those pages.

3. Click in the authentication method field and select **LDAP**, **IBM i**, **Automate**, or **Webdocs for i**.

   If you chose LDAP:

   a. Enter the name or address of the **LDAP Host** server.

> **NOTE:** These settings are specific to the HelpSystems Insite module, and do not pertain to Access Authenticator's LDAP settings configured on Access Authenticator's LDAP Settings page.



b. Enter the **LDAP Port** used by the LDAP server.

c. Switch **Use SSL with LDAP** to On if a secure sockets layer (SSL) is used with your LDAP server.

d. Enter the name of your **LDAP Administrator**. This administrator must be able to read the LDAP tree.

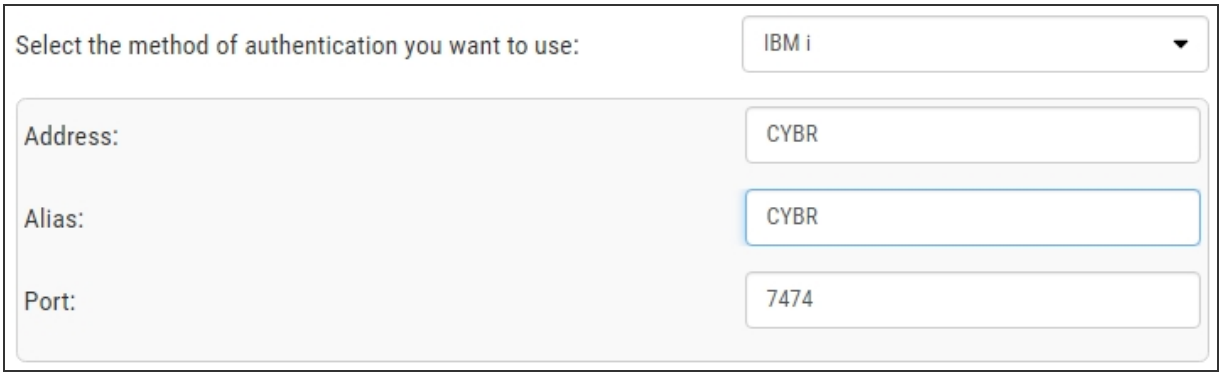
> **NOTE:** Distinguished Name format is acceptable. For more on Distinguished Names, go to the Microsoft Developer Network website.

e. Enter the **Administrator Password** (and **Confirm Password**) for the administrator you entered above.
f. Enter the **Default Context** for the LDAP server. This is the location to search for users in Distinguished Name format.
g. Enter the **User ID Field Name** for the LDAP server. This is the Attribute Name to search in for the username.
h. Enter the **LDAP Field to Match**. This is the value that matches the "samaccountname" listed for the user on the LDAP server.
i. Click **Validate LDAP Connection** to test the information you entered above.

If you chose IBM i:

a. Enter the name or **Address** of the IBM i server you want to use for authentication.

> **NOTE:** This doesn't have to be one of the IBM i systems that you're connecting Insite to (see Product Connections).



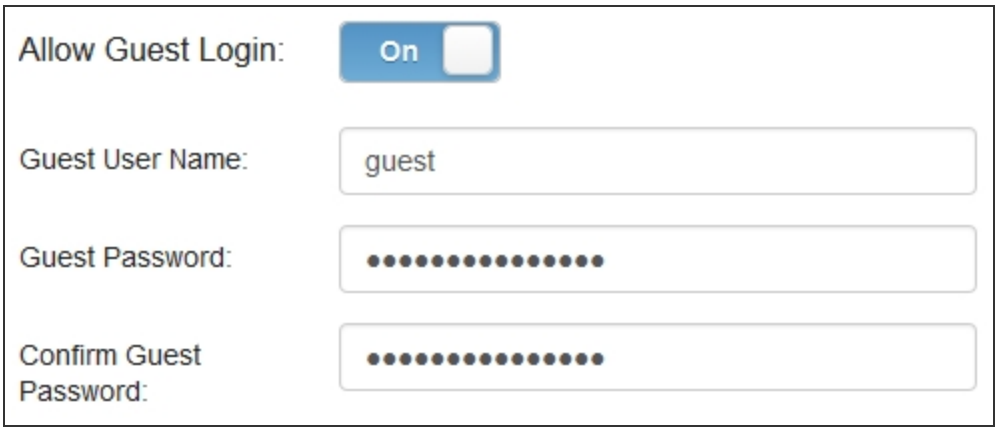
b. Enter an **Alias** for the server you specified above.

> **NOTE:** The alias you enter here is displayed on the Log In page as the server that's providing authentication.

c. Enter the **Port** the server uses.

4. To enable guest logins and define the guest profile:

a. Click **On** to Allow Guest Login. Click **Off** to disable it.



b. Enter the **Guest User Name**. The default is 'Guest'.

c. Enter the **Guest Password**. Enter it again to confirm it. The default is 'guest'.

5. Click **Save**.

Roles

> **NOTE:** Only a user with administration permissions can access this page.

Getting There: In the Navigation Pane, click **Roles** under Settings. If the menu is hidden, click  .

Overview

User access to Insite and its products can be secured through the use of Roles, which are collections of authorities that define a user's permissions for managed systems and products.

> EXAMPLE:
>
> **#1**
>
> You have a team of accountants who are all part of the security group ACCOUNTING. By default, everyone in the ACCOUNTING group gets access to basic Insite functionality. However, you have a few accounting supervisors who need access to the Powertech test systems. You want to give them this authority without changing the privileges of everyone in the ACCOUNTING security group.
>
> To achieve this, you would create an Accounting Supervisor Role with access to the Powertech test systems and assign it to an ACCOUNTING SUPERVISOR Security Group. Because the accounting supervisors are part of both Security Groups, and because both Security Groups have their respective Roles attached, the supervisors will inherit permissions for basic Insite functionality and the Powertech test systems. Regular accounting users will not be affected.
>
> **#2**
>
> You have three system engineers that only need access to the Robot products in Insite (Robot Network and Robot Schedule). You want to give them authority to all product functions for Robot but limit their access to other areas of Insite. To achieve this, you could create a Role that is authorized to Robot Network, Robot Schedule, and HelpSystems Insite Product Licensing, then assign it to each administrator

Insite comes with a default role that's created when you first log on as an admin. The *admin* role cannot be deleted and has full authority to all areas of Insite.

Managing Roles

Click a link to learn how to add, edit, or delete roles:

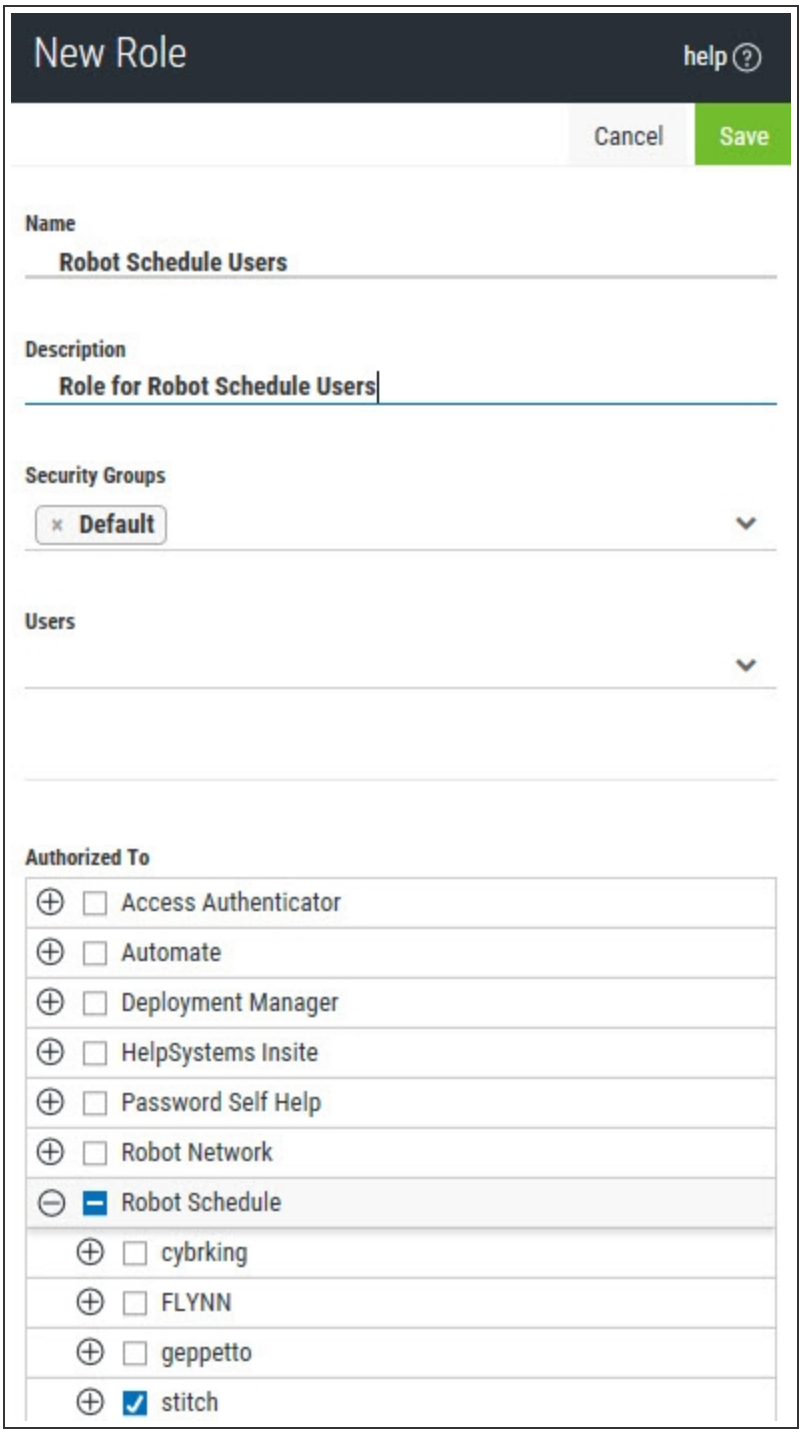
> **NOTE:** Permissions granted through roles are additive. If you create two roles with different authorities and assign them to a user, that user will have the authorities from both roles.

Adding a Role

To ensure your users only access the areas of Insite they're authorized to, you can create and assign them to roles.

Follow these steps to create a role:

1. In the Navigation Pane, click **Roles** under Settings. If the menu is hidden, click  .
2. Click **Add**.



3. Enter a **Name** for the role you want to create.
4. Enter a **Description** for the role.
5. Select any security groups you want to add the role to. For example, if you create a role with permissions to the Robot Schedule production system (like in the image above), you could add a security group for all Robot Schedule users to it.

> **NOTE:** If you haven't created any security groups yet, see Security Groups.

6. If you want to add users to the role (outside of users who are assigned to any security groups this role is a part of, as they'll get this role's permissions automatically), type their username into the field or select them drop the drop-down.
7. Click the products and areas of Insite you want to apply to this role.
8. Click **Save**.

When you're finished, the new role will show up on the Roles page.

Editing a Role

Follow these steps to edit an existing role:

1. In the Navigation Pane, click **Roles** under Settings. If the menu is hidden, click .
2. Click **Show Actions** next to a user, then select **Edit User**.
3. Enter a new name for the role.
4. Enter a new description for the role.
5. Add security groups to or remove security groups from the role.

   > **NOTE:** If you haven't created any security groups yet, see Security Groups.

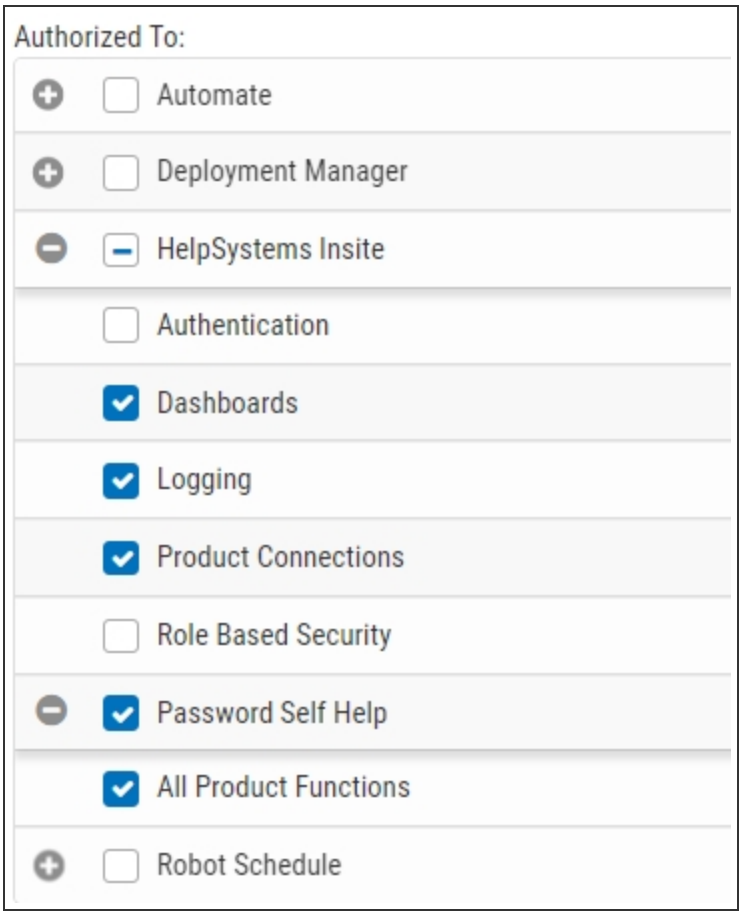
6. If you want to add users to the role (outside of users who are assigned to any security groups this role is a part of, as they'll get this role's permissions automatically), type their username into the field or select them drop the drop-down.

   If you want to remove users from the role, click the x above their username.

   > **NOTE:** If you add a user to or remove a user from the role while they're logged on, the change won't take effect until they log out.

7. Modify which products and areas of Insite you want applied to this role.



8. Click **Save**.

Deleting a Role

Follow these steps to delete a role:

1. In the Navigation Pane, click **Roles** under Settings. If the menu is hidden, click .
2. Click the check box next to the role you want to remove, then click **Delete**.

   > **NOTE:** You cannot delete the default admin role.

3. Click **Delete** again to confirm.

When you're finished, the role will be removed from the Roles page.

> **NOTE:** If you delete a role while users who are assigned to that role are logged in, those users will retain the role's permissions until they log out.

Assigning a Default Profile to a Role

To assign a default profile to a role:

1. In the Navigation Pane, click **Roles** under Settings. If the menu is hidden, click .
2. Click **Show Actions** for the role you want to add a default profile to, then click **Assign Default Profiles**.
3. Click the system to assign a default profile to. For more than one system, check their boxes, then click **Change Profile**.

   > NOTE: If you add a default profile to multiple systems at once, note that you can only apply one per batch (for example, you have six different systems. You can assign a profile to all of them, rather than doing one at a time, but you'll only be able to select a single default profile to use).

4. The Change Profile page displays. From here, you can create a new profile or select an existing profile:

   To create a new profile:

   a. Click the Select a Profile drop-down and choose **New Profile** OR click **Actions**, then click **Add Profile**.
   b. Enter a **User Name** for the default profile.
   c. Enter a **Password**, then confirm the password to ensure they match.
   d. Click **Save** to create the new profile and assign it to the role.

   > NOTE: The default profile will be saved with a generic alias (*system*_profile_0, for example). To change this, see Editing a Default Profile.

   To select an existing profile:

   a. Click the Select a Profile drop-down and choose a profile from the list.
   b. Click **Save**.

   > NOTE: You can also edit the default profile before you save. To do this, click **Actions** after you select a default profile from the drop-down, then click **Edit Profile**.

Once the default profile is assigned, any users added to this role will be able to access its systems and products the next time they log in.

Changing a Default Profile for a Role

At some point, you may want to change the default profile assigned to a role.

To change the default profile for a selected role:

1. In the Navigation Pane, click **Roles** under Settings. If the menu is hidden, click .
2. Click **Show Actions** for the role you want to edit, then click **Assign Default Profiles**.
3. Click the system to assign a default profile to. For more than one system, check their boxes, then click **Change Profile**.

> **NOTE:** If you add a default profile to multiple systems at once, note that you can only apply one per batch (for example, you have six different systems. You can assign a profile to all of them, rather than doing one at a time, but you'll only be able to select a single default profile to use).

4. The Change Profile page displays. From here, you can add a new profile, remove the current profile, or switch to an existing profile:

   To add a new profile:

   a. Click the Select a Profile drop-down and choose **New Profile** OR click **Actions**, then click **Add Profile**.
   b. Enter a **User Name** for the default profile.
   c. Enter a **Password**, then confirm the password to ensure they match.
   d. Click **Save** to create the new profile and assign it to the role.

   > **NOTE:** The default profile will be saved with a generic alias (*system*_profile_0, for example). To change this, see Editing a Default Profile.

   To remove the current profile:

   a. Click the Select a Profile drop-down and choose **No Profile**.
   b. Click **Save**.

   To switch to an existing profile:

   a. Click the Select a Profile drop-down and choose an existing profile from the list.
   b. Click **Save**.

   > **NOTE:** You can also edit the default profile before you save. To do this, click **Actions** after you select a default profile from the drop-down, then click **Edit Profile**.

Default Profiles

> **NOTE:** Only a user with administration permissions can access this page.

Getting There: In the Navigation Pane, click **Default Profiles** under Settings. If the menu is hidden, click .

Overview

If you need to give a user permission to a product they otherwise aren't able to access, you can add them to a role that has a default profile assigned to it. This default profile works with the systems connected to the role and allows the user to access the products they need, without requiring them to have an authenticated user profile on the products' systems.

> **EXAMPLE:** A user needs to view Automate Ops Console but doesn't have a profile on the Automate Enterprise server. The user does, however, have an existing profile on an IBM i system that's connected to Insite. The admin creates a default profile, adds it to the server connected to an Automate User role, and assigns the role to the user. Despite logging on with a validated IBM i profile, the default profile enables the user to access Automate Ops Console and its server.

Default Profiles and Roles

Click a link to learn how to assign a default profile to a role or change the role's current default profile:

Assigning a Default Profile to a Role

Changing a Default Profile for a Role

Adding a Default Profile

Default profiles allow you to connect to a role or system without needing to create a user. This is useful in the event that someone on your team can't be validated through LDAP or an IBM i connection but still needs access to the various areas in Insite.

Follow these steps to create a default profile:

1. In the Navigation Pane, click **Default Profiles** under Settings. If the menu is hidden, click .
2. Click **Add**.
3. Enter a name for the default profile you want to create.
4. Enter a user name.
5. Enter a password. Confirm the password.
6. Click **Save**.

When you're finished, the new default profile will show up on the Default Profiles page.

Editing a Default Profile

Follow these steps to edit an existing default profile:

1. In the Navigation Pane, click **Default Profiles** under Settings. If the menu is hidden, click .
2. Click **Show Actions**, then select **Edit Default Profile**.
3. Enter a new name for the default profile.
4. Enter a user name.
5. Enter a password. Confirm the password.
6. Click **Save**.

Deleting a Default Profile

Follow these steps to delete a default profile:

1. In the Navigation Pane, click **Default Profiles** under Settings. If the menu is hidden, click .
2. Click the check box next to the default profile you want to remove, then click **Delete**.
3. Click **Delete** again to confirm.

When you're finished, the default profile will be removed from the Default Profiles page.

Security Groups

> **NOTE:** Only a user with administration permissions can access this page.

Getting There: In the Navigation Pane, click **Security Groups** under Settings. If the menu is hidden, click  .

If you have a large number of users in Insite, you may find it useful to put them in groups. Security groups allow you to place your users in a container and assign them permissions (or remove permissions) at the top level, rather than at a user level.

Security groups also minimize the number of roles you need to assign a user directly. This is helpful if you only want to give users permissions they actually need (such as giving accountants the Accounting Users role or Robot Schedule engineers the Robot Schedule Engineers role). Instead of assigning three roles to a user (Accounting Users, Accounting Supervisors, and Accounting Managers), you could create three different security groups (ACCOUNTING, ACCOUNTING SUPERVISORS, ACCOUNTING MANAGERS) and assign users to them. When they no longer need the roles attached to the security group, you can remove them from the group.

A note on LDAP authentication

If you use LDAP authentication, you can use an LDAP Group distinguished name* in your security groups that will automatically assign certain users to the group when they first log on (see Adding a Security Group for instructions). These users are determined by the information in the distinguished name, such as a matching CN name. Once the users are added, they are given the permissions of whatever roles are assigned to the security group with **minimum management** from the administrator. (LDAP permissions can be nested if a user is part of multiple security groups.)

> **NOTE:** *Distinguished names are sequences of relative distinguished names (attributes with associated values) connected by commas. For example, *CN=Accounting_0,CN=Accounting,CN=aTestLocation,CN=Users,DC=company,DC=net* is a distinguished name. See Microsoft's documentation on Distinguished Names for more details.

Ways to Use Security Groups

There are a few ways you can use security groups.

1. As a way to organize your users

Security groups can be used as organizational tools. You can add users and roles, and any changes made to the groups or roles attached to them will trickle down to the users. This ensures that the work you do with individual users (after they are created or pre-registered, see Adding a User) is minimal.

> **EXAMPLE:** You create an ACCOUNTING security group and add fifteen users to it (if you have LDAP authentication set up, users in the Accounting department could even be automatically assigned to this

group when they first log on to Insite). Then, you add an Accounting Users role to the security group so that every user in ACCOUNTING is given basic Insite permissions.

2. As a way to give a user extra permissions

You can also use security groups to give a user permissions to an area of Insite they generally don't have access to. This may be pertinent if you have a Powertech engineer who needs temporary access to an Automate Enterprise server or a WebDocs supervisor who needs to look at a Robot test system.

Users can easily be added to or removed from security groups, which makes it simple to give a user permissions that are outside their normal role functions.

EXAMPLE: A Powertech Network Security engineer needs to collaborate with an Automate Ops Console engineer on a three week project. However, he's currently only added to the PTNS ENGINEERS security group and cannot access Automate Ops Console in the Insite Navigation Pane. To allow him temporary access to the Automate Enterprise production system, you either a) add him to the AUTOMATE OPS CONSOLE security group or b) create an AUTOMATE PROJECT security group that has the permissions he needs and add an Automate Ops Console Users role to it. When the project completes, you simply remove him from the security group (or delete it all together).

The Default Security Group

Insite comes with a default security group that users are assigned to if they're not automatically assigned to a group or role. The *Default* security group cannot be deleted and has no basic authorities out of the box. If you want to add authorities to the default security group, you can do so by adding roles.

The *Default* security group should only be used to catch users who are not given a group or role when they first log on to Insite. We don't recommend using it to give users authorities long term. Please note, too, that if you assign another security group or role to the user, the default security group will be automatically removed next time they log on.

Managing Security Groups

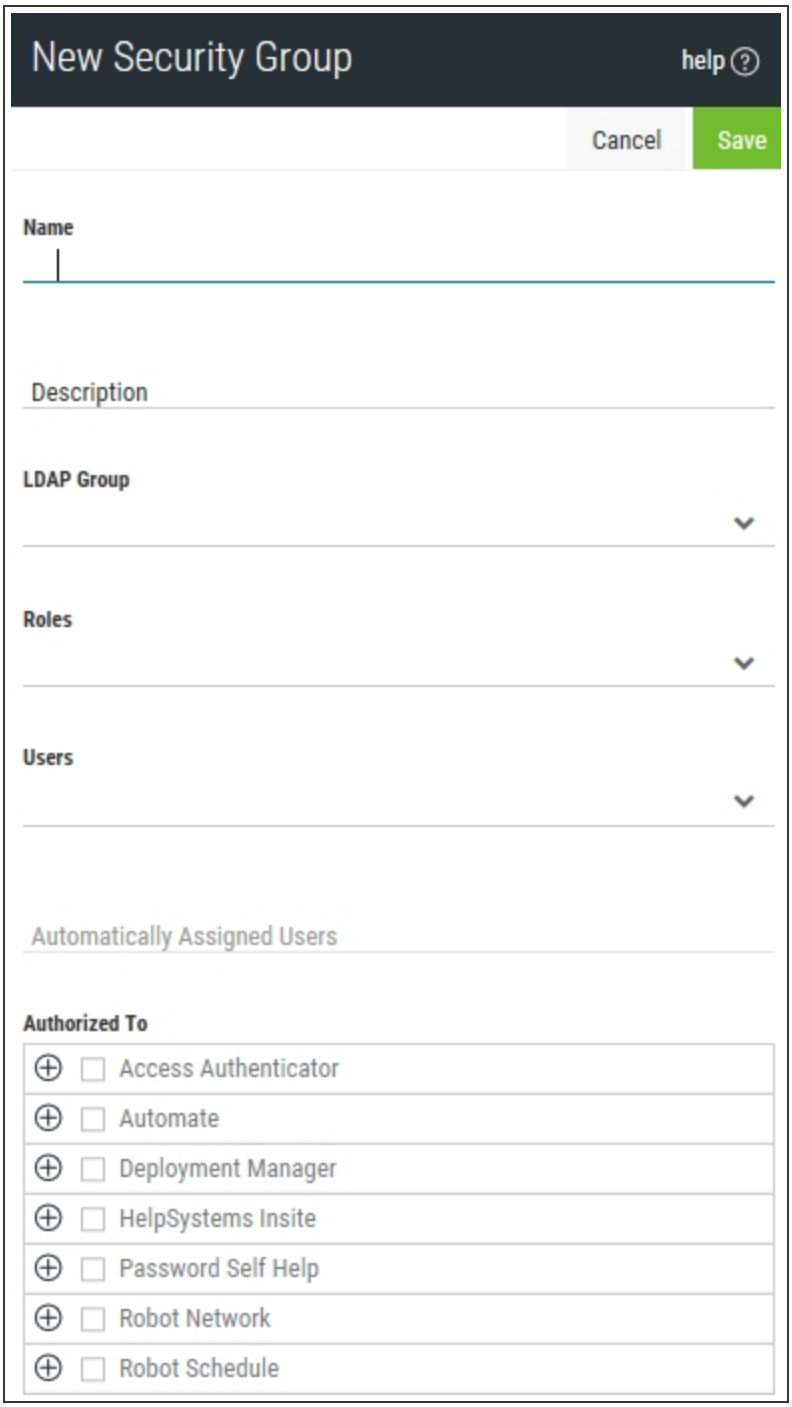
Click a link to learn how to add, edit, or delete security groups:

Adding a Security Group

Before you can assign users and Roles to a Security Group, you need to create one. Insite comes with a default Security Group, but it has no basic authorization added and should only be used to catch users that aren't assigned to a Security Group (or Role).

Follow these steps to create a Security Group:

1. In the Navigation Pane, click **Settings > Security Groups**. If the menu is hidden, click .
2. Click **Add**.



3. Enter the **Name** and **Description** of the Security Group you want to create.
4. If you're using LDAP as your Authentication method, enter the distinguished name (DN) for your **LDAP Group**. This DN is used to search for users in your LDAP server and add them (if they match) to this Security Group when they first log on to Insite. *This field does not appear if you aren't authenticating with LDAP.*
5. Select the Role you want to add to the Security Group.

> **NOTE:** If you haven't created any Roles yet, see Roles.

6. If you want to add specific users to the Security Group, select them from the drop-down.
7. Ensure the Security Group is authorized to the correct Insite areas and products. These boxes will be automatically checked with whatever authorities the Roles and Security Groups you've selected are assigned to.

   > **NOTE:** You can only add authorities through a Role. Permissions are additive if multiple Roles are assigned to the Security Group.

8. Click **Save**.

When you're finished, the new Security Group will show up on the Security Groups page.

Editing a Security Group

Follow these steps to edit an existing security group:

1. In the Navigation Pane, click **Security Groups** under Settings. If the menu is hidden, click .
2. Click **Show Actions**, then select **Edit Security Group**.
3. The remaining options are identical to adding a Security Group. See Adding a Security Group.

Deleting a Security Group

Follow these steps to delete a security group:

1. In the Navigation Pane, click **Security Groups** under Settings. If the menu is hidden, click .
2. Click the check box next to the security group you want to remove, then click **Delete**.

   > **NOTE:** You cannot delete the default security group.

3. Click **Delete** again to confirm.

When you're finished, the security group will be removed from the Security Groups page.

> **NOTE:** If you delete a security group while users who are assigned to that group are logged in, those users will retain the security group's permissions until they log out.

Users

> **NOTE:** To work with Roles, you must be assigned a Role with Access to Role Based Security. See Roles for more information.

Getting There: In the Navigation Pane, click **Users** under Settings. If the menu is hidden, click .

Overview

On the Users page, you can see who can access Insite and edit their details (such as the roles and security groups they're assigned to) as necessary.

There are two ways a user can be added. You can create them manually from the Users page, or they will automatically be created for anyone who logs on to Insite through proper authentication channels (IBM i, LDAP, Automate, or Webdocs for i). If you haven't already set up Authentication, see Authentication.

LDAP Users: If a user is authenticated against an LDAP server, they will be able to log on to Insite and will be automatically assigned permissions based on their LDAP group(s).

IBM i Users: If a user is authenticated against an IBM i system, they will be able to log on to Insite but won't have any permissions. The admin will need to edit the user that was created during their initial logon and assign them to a role or security group in order for them to have access to the product the next time they log on.

Automate Users: If a user is authenticated against an Automate Enterprise server, they will be able to log on to Insite but won't have any permissions. The admin will need to edit the user that was created during their initial logon and assign them to a role or security group in order for them to have access to the product the next time they log on.

Webdocs for IBM i Users: If a user is authenticated against a Webdocs IBM i system, they will be able to log on to Insite but won't have any permissions. The admin will need to edit the user that was created during their initial logon and assign them to a role or security group in order for them to have access to the product the next time they log on.

Managing Users

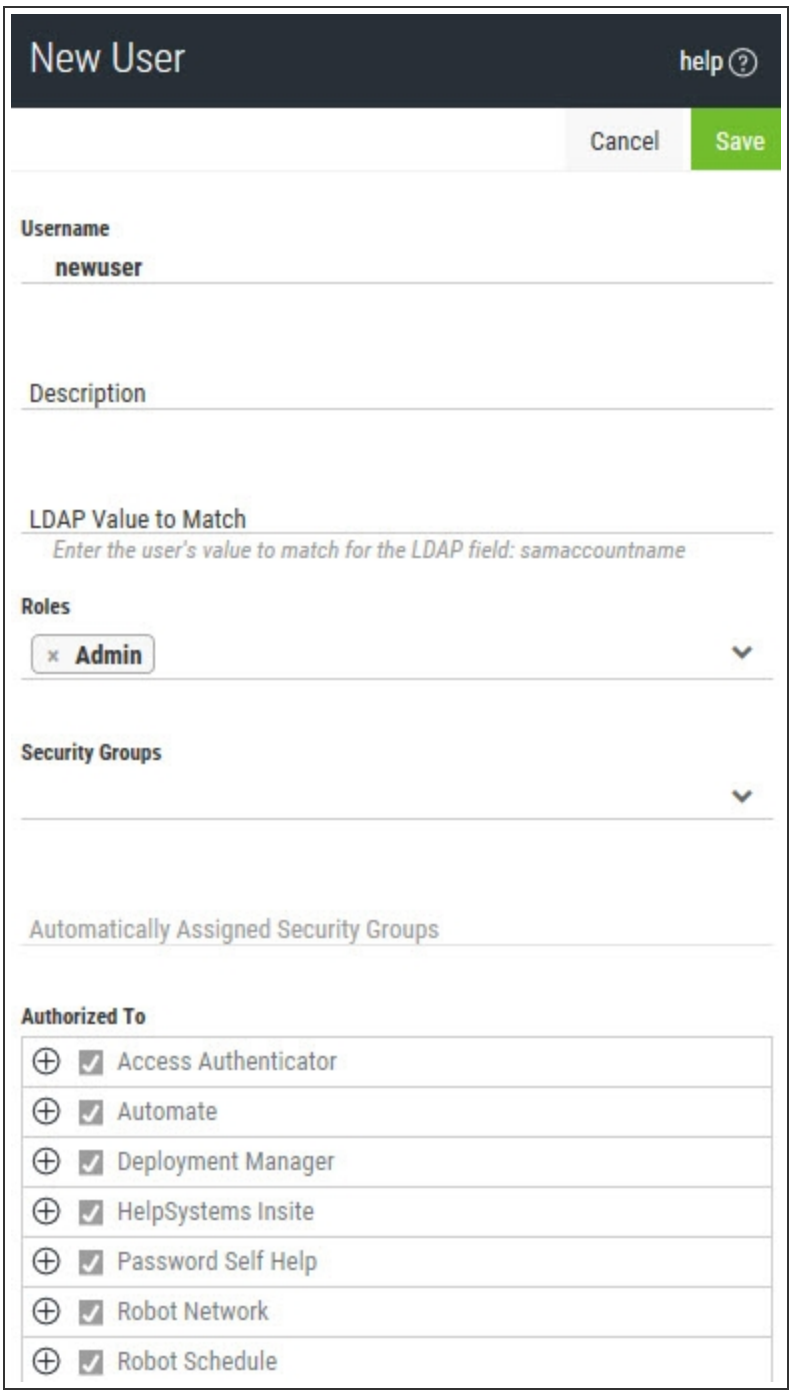
Click a link to learn how to add, edit, or delete a user:

Adding a User

Users are created in two ways: when a user logs on to Insite using an approved method of Authentication, such as LDAP, or when an administrator manually creates (pre-registers) a user.

As an administrator, you can use the following steps to manually create (pre-register) a user:

1. In the Navigation Pane, click **Settings > Users**. If the menu is hidden, click .
2. Click **Add**. The New User screen appears.



3. Enter the **Username** of the user you want to create. If IBM i authentication is being used, the username you choose must match the user's IBM i profile on the authenticated IBM i system. If LDAP is the authentication method being used, Insite uses the **LDAP Value to Match** value for authentication.
4. Enter a description for the user.

5. If LDAP is being used for authentication, enter the value of the LDAP field being used for authentication (specified in the Authentication screen's "LDAP Field to Match" field). By default, the samaccountname field is used. See Authentication for more details.
6. Select the Role(s) you want to assign to the user. See Roles for more details.
7. If you want to add the user to a Security Group, select one from the drop-down. See Security Groups for more details.

   > **NOTE:** Roles can also be applied to Security Groups. Users inherit Roles of the Security Group they are assigned to.

8. Ensure the user is authorized to the correct Insite areas and products. These boxes will be automatically checked with whatever authorities the roles and security groups you've selected are assigned to.

   > **NOTE:** You can only add authorities through a role. Permissions are additive if a user is assigned to multiple roles or a security group composed of multiple roles.

9. Click **Save**.

When you're finished, the new user will show up on the Users page.

Editing a User

Follow these steps to edit an existing user:

1. In the Navigation Pane, click **Users** under Settings. If the menu is hidden, click .
2. Click **Show Actions** next to a user, then select **Edit User**.
3. Remaining options are identical for adding a new user. See Adding a User.

Deleting a User

Follow these steps to delete a user:

1. In the Navigation Pane, click **Users** under Settings. If the menu is hidden, click .
2. Click the check box next to the user you want to remove, then click **Delete**.

   > **NOTE:** You cannot delete the default admin user.

3. Click **Delete** again to confirm.

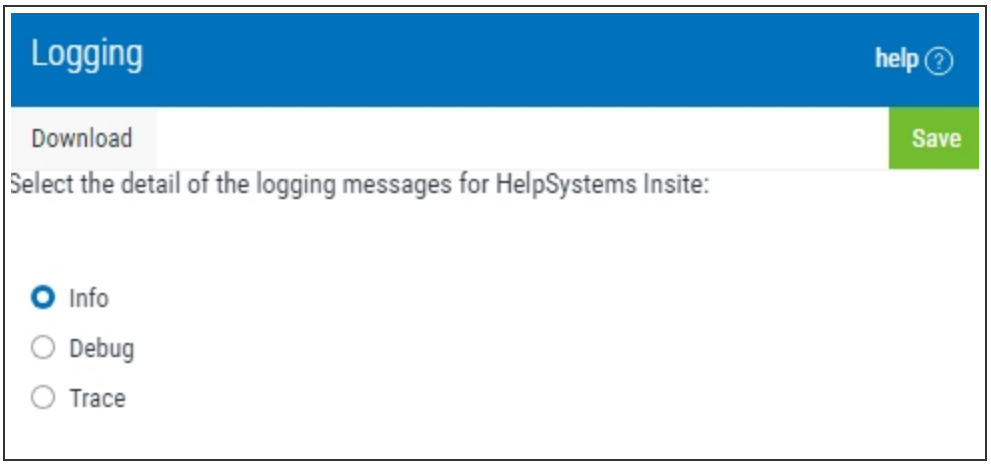
When you're finished, the user will be removed from the Users page.

Logging

> **NOTE:** Only a user with administration permissions can access this page.

You can select the level of logging you want and download the log files.

1. In the Navigation Pane, click **Logging** under Settings. If the menu is hidden, click .



2. Select the level of message logging you want used for the Insite applications. You can choose from three levels. "Info" has the least amount of detail; "Trace" has the most.

   > **NOTE:** Selecting "Trace" will have an impact on your server performance.

3. Click **Save**.

To download the logs, click **Download** while you're on this page. Then, **Save** or **Open** the .zip file.

Account

The Account option in the Navigation Pane allows you to add your IBM i and Automate Enterprise server profiles to HelpSystems Insite and assign them to each of the connections that were created between Insite and your IBM i and Automate Enterprise servers. It also contains preferences that you can set for your user, including product-specific preferences.

Getting There: In the Navigation Pane, click **Account**. If the menu is hidden, click .

Click a link below to learn more about each section.

Getting Started Page

The Getting Started page shows you which tasks still need to be completed before you can use the modules available with HelpSystems Insite. It also shows you which of the modules are available, and the version and build that's installed on the Insite server for each of them.

If this is the first time you're logging on to Insite, the Getting Started page opens automatically. That's because you need to perform some tasks before you can use the available products. However, what you need to do depends on what type of user you log in as:

- The Insite administrator needs to create the necessary connections to the IBM i and Automate Enterprise servers.
- The Insite administrator needs to define how to authenticate users.
- All users (including the administrator) need to create profiles for themselves and assign those profiles to the connected systems.

If you later need to adjust any of the settings, click **Getting Started** under Settings in the Navigation Pane to return to the page.

Click the following links for instructions on completing the necessary tasks:

Product Connections

> **NOTE:** Only a user with administration permissions can access this page.

Getting There: In the Navigation Pane, click **Getting Started** under Settings, then click **Product Connections**. If the menu is hidden, click .

Currently, HelpSystems Insite has modules available for the following products:

- Access Authenticator
- Alignia
- Authority Broker
- Automate Ops Console
- Deployment Manager
- Password Self Help
- Network Security
- Robot Network
- Robot Schedule
- Webdocs for IBM i

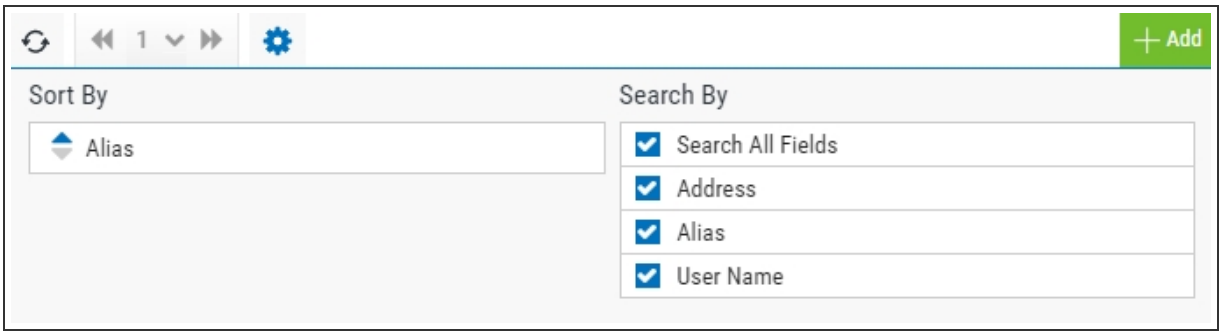
However, before you can begin using the above modules, you have to create connections between Insite and your IBM i and Automate Enterprise servers that have those products installed on them. You do that from the Product Connections page.

This page shows which connections have been made between Insite and your IBM i and Automate Enterprise servers. For each connected system, you can see which products are installed on it. You can also connect and disconnect the IBM i and Automate Enterprise servers via this page.

Sorting and Searching Your Product Connections View

There are settings for the Product Connections page that allow you to choose how to sort the list and decide what data will be searched.

1. Click **Settings**.
2. Select how to sort the list of connections (Sort By). Click your selection again to change the sort order to ascending or descending.
3. Select what you want to use when searching for connections. You can choose to **Search All Fields**, or to search by **Address**, **Alias**, or **User Name**.
4. Click **Settings** to close the settings.


1
Add
Sort By
Alias
Search By
Search All Fields
Address
Alias
User Name

Authentication

The Authentication page is only accessible to a user with administrative permissions. It allows you to set the session timeout, define the authentication method, and enable guest logins.

Getting There: In the Navigation Pane, click **Authentication** under Settings. If the menu is hidden, click .

You can do the following:

Set the session timeout limit

You can set the number of minutes a session can remain inactive before timing out.

> **NOTE:** If the timeout limit set here is greater than what a user sets for the auto-refresh intervals for dashboard widgets or in their preferences (for items such Schedule Activity or the Status Center), it will prevent the user's session from timing out if they're on one of those pages.

Select the authentication method you want to use and set it up

Before any of your users can log on to Insite, you must specify how to authenticate users. You can choose to authenticate your users against an LDAP server, one of your IBM i systems, one of your Automate Enterprise servers, or one of your Webdocs for IBM i systems.

Enable a guest login

A guest profile allows you to give people access to the dashboards that are marked as Guest. The Guest profile is for people who normally don't log onto the product and who may not even have an IBM i, Automate Enterprise server, or Webdocs IBM i profile. Guest users can only access the Dashboard area and view only those dashboards designated as Guest. They cannot access any other part of Insite, see any other dashboards, or make any changes.

The default Guest profile credentials are: User Name = guest, Password = guest. However, you can change it, if necessary. All guests use the same guest profile.

To complete the above tasks:

1. In the Navigation Pane, click **Authentication** under Settings. If the menu is hidden, click .
2. Enter the **Session Timeout** in minutes.

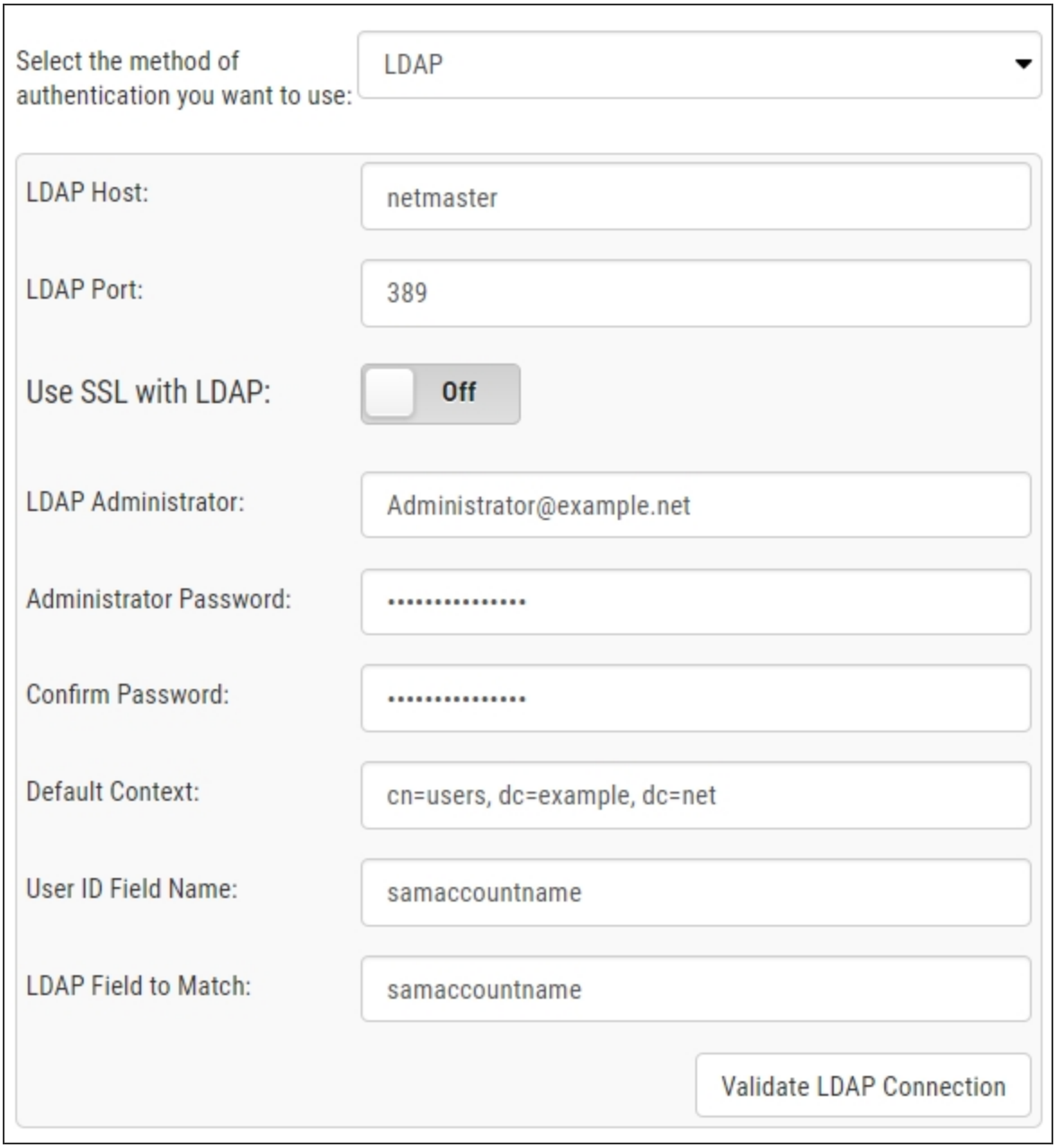
   > **NOTE:** If the timeout limit set here is greater than what a user sets for the auto-refresh intervals for dashboard widgets or in their preferences (for items such Automate Activity, Schedule Activity, or the Status Center), it will prevent the user's session from timing out if they're on one of those pages.

3. Click in the authentication method field and select **LDAP**, **IBM i**, **Automate**, or **Webdocs for i**.

   If you chose LDAP:

   a. Enter the name or address of the **LDAP Host** server.

> **NOTE:** These settings are specific to the HelpSystems Insite module, and do not pertain to Access Authenticator's LDAP settings configured on Access Authenticator's LDAP Settings page.



b. Enter the **LDAP Port** used by the LDAP server.
c. Switch **Use SSL with LDAP** to On if a secure sockets layer (SSL) is used with your LDAP server.
d. Enter the name of your **LDAP Administrator**. This administrator must be able to read the LDAP tree.

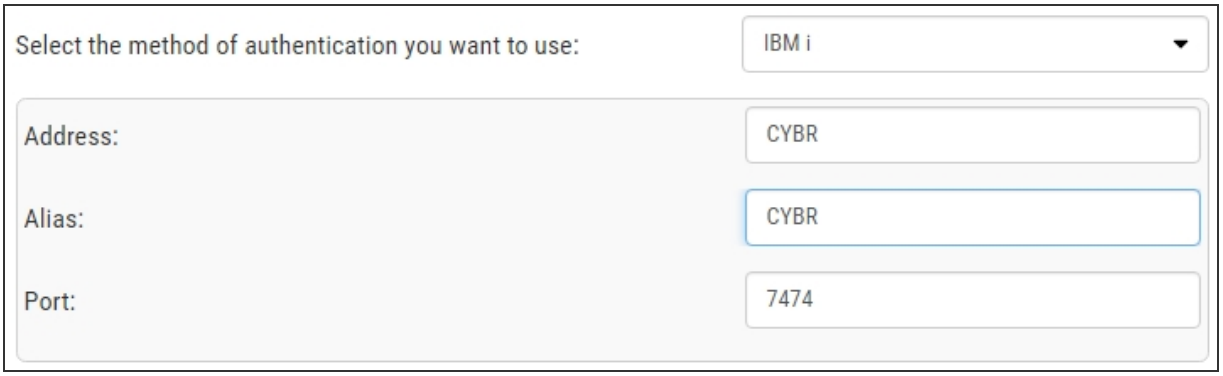
> **NOTE:** Distinguished Name format is acceptable. For more on Distinguished Names, go to the Microsoft Developer Network website.

e. Enter the **Administrator Password** (and **Confirm Password**) for the administrator you entered above.
f. Enter the **Default Context** for the LDAP server. This is the location to search for users in Distinguished Name format.
g. Enter the **User ID Field Name** for the LDAP server. This is the Attribute Name to search in for the username.
h. Enter the **LDAP Field to Match**. This is the value that matches the "samaccountname" listed for the user on the LDAP server.
i. Click **Validate LDAP Connection** to test the information you entered above.

If you chose IBM i:

a. Enter the name or **Address** of the IBM i server you want to use for authentication.

> **NOTE:** This doesn't have to be one of the IBM i systems that you're connecting Insite to (see Product Connections).



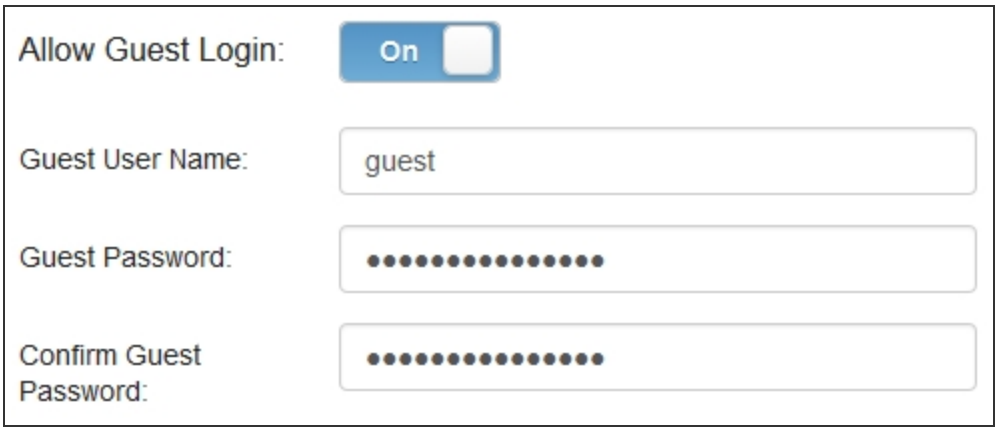
b. Enter an **Alias** for the server you specified above.

> **NOTE:** The alias you enter here is displayed on the Log In page as the server that's providing authentication.

c. Enter the **Port** the server uses.

4. To enable guest logins and define the guest profile:

a. Click **On** to Allow Guest Login. Click **Off** to disable it.



b. Enter the **Guest User Name**. The default is 'Guest'.

c. Enter the **Guest Password**. Enter it again to confirm it. The default is 'guest'.

5. Click **Save**.

Assigned Profiles

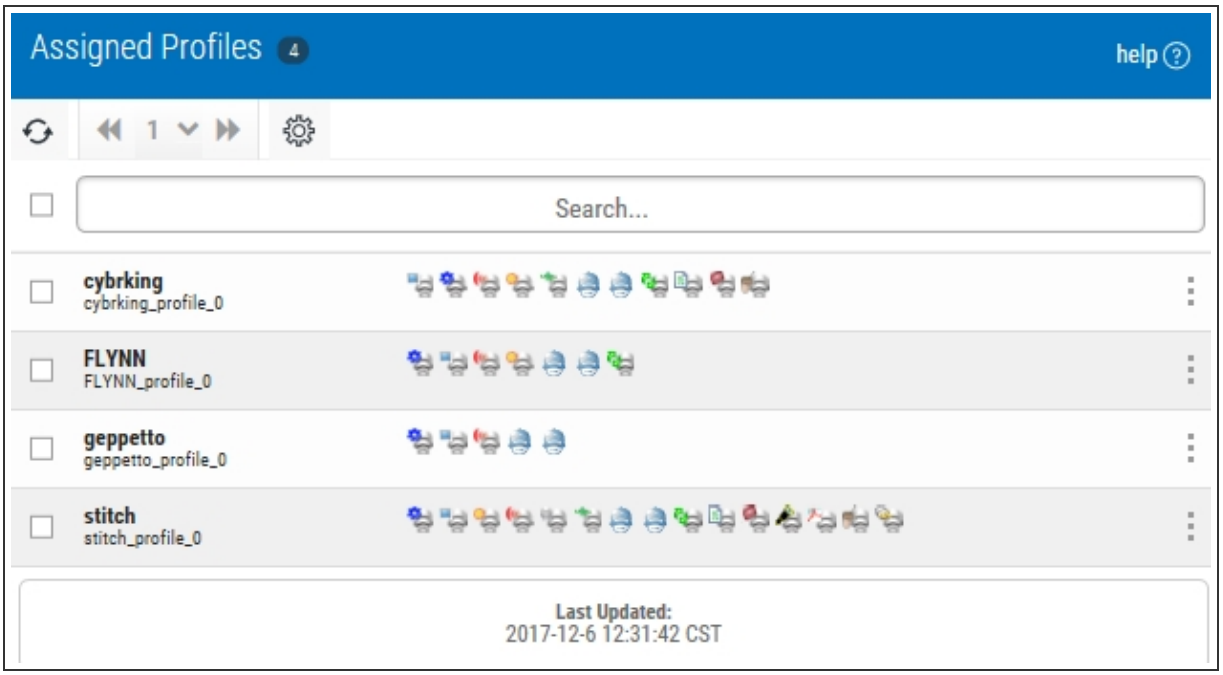
After you add the profiles, you assign them to the product connections that the administrator created. You will not be able to work with any of the products until you assign a profile to that connection. For each product connection listed on the Assigned Profiles page, you can see which products are installed on it (if any) and which profile is assigned to it (if any). This is specific to the user you are logged on as.

The profile you assign to a product connection determines your authorization to the products on that system.

Getting There: In the Navigation Pane, click **Assigned Profiles** under Account. If the menu is hidden, click .

Things to know and do:

- The total number of records is at the top of the page.
- Click the refresh button to refresh the display.
- Click the page number and select the page you want to view. Or, click the previous and next arrows.
- Start typing in the Search field to search for a specific product connection. It will find everything that contains what you're typing.



Sorting and Filtering the Assigned Profiles View

There are settings for the Assigned Profiles page that allow you to choose how to sort the list, and what types of data will be searched when you do a search.

1. Click **Settings**.
2. Select how you want the list sorted (Sort By). Click your selection again to change the sort order to ascending or descending.
3. Select what you want to use when searching for product connections. You can choose to **Search All Fields**, or to search by **Address**, **Alias**, or **User Profile Alias**.
4. Click **Settings** to close the settings.

Assigning Profiles to a Product Connection

To assign profiles:

1. In the Navigation Pane, click **Assigned Profiles** under Account. If the menu is hidden, click .
2. Select (check) one or more product connections to assign a single profile to.
3. Click **Change Profile**.

   > **NOTE:** If you don't have any profiles created, you will go to the New Profile page instead.

4. Select the profile you want to assign to the connections. Or select "No Profile" if you don't want to assign a profile at this time. **Note:** You must assign a profile to be able to see data for that product server.
5. If you need to add a new profile, there are two ways to do it, depending on how you will use the profile:
   - **New Profile** is intended for users who will use a different profile for each product connection. It automatically creates a profile name for you that's used within HelpSystems Insite. To use this method, select **New Profile** from the Select a Profile list. Then, enter the **User Name** and **Password** for it.
   - **Add Profile** is intended for users who will use the same profile for several product connections. You enter the profile name yourself. This makes it easier to find and re-use the profile. To use this method, click **Actions** and select **Add Profile**. See Adding a New Profile for detailed instructions.
6. If you wish to edit the profile you selected in step 5, click **Actions** and select **Edit Profile**. See Editing a Profile for detailed instructions.
7. Click **Save**.

Profiles

In order to see the data from an IBM i system or Automate Enterprise server that HelpSystems Insite is connected to, you must add a profile for it and assign it to that system. The user in the profile is the user who's checked for security in each product, and is also the one who's audited when actions are taken.

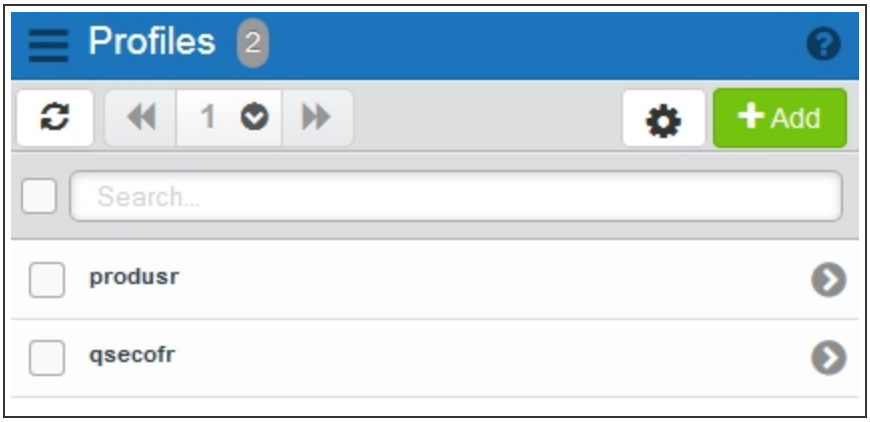
The Profiles page lists the profiles that you've added. This is specific to the user you are logged in as. You can also add new profiles as you're assigning profiles to connections.

Sharing a profile amongst several product connections saves time because if the profile needs to be changed (name, user name, or password), you can change it in one spot, rather than having to change it for each system individually.

Getting There: In the Navigation Pane, click **Profiles** under Account. If the menu is hidden, click .

Things to know and do:

- The total number of records is at the top of the page.
- Click the refresh button to refresh the display.
- Click the page number and select the page you want to view. Or, click the previous and next arrows.
- Start typing in the Search field to search for a specific profile. It will find everything that contains what you're typing.



Sorting and Filtering the Profiles View

There are settings for the Profiles page that allow you to choose how to sort the list, and what types of data will be searched when you do a search.

To sort and filter the profiles view:

1. Click **Settings**.
2. Select how you want the list sorted (Sort By). Click your selection again to change the sort order to ascending or descending.
3. Select what you want to use when searching for profiles. You can choose to **Search All Fields**, or to

search by **Name**or **User Name**.

4. Click **Settings** to close the settings.

Opt-in Profiles

Opt-in profiles allow you to create and assign a profile to a connection quickly, without setting up an assigned profile beforehand. Once an opt-in profile has been created, you can edit the profile's default information to create a customized assigned user profile.

Things to know and do:

- You have two options for each new product connection:
  - Set up a profile and assign it to the connection using these steps.
  - Create an opt-in profile when prompted using the steps in "Creating an Opt-in Profile" below.

    > **NOTE:** You will be prompted for a log-in each time no assigned profile is detected for the current system.

- Once a profile is created for a product connection, you won't be prompted again unless the assigned profile is deleted.
- To delete an opt-in profile, see Deleting Profiles.

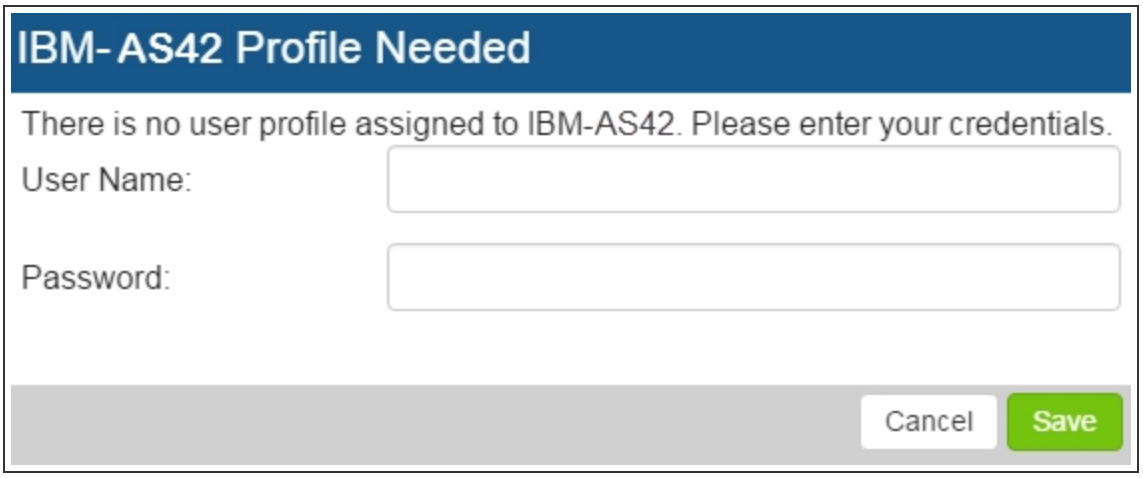
Product specific information:

- Robot Network for HelpSystems Insite doesn't allow the creation of opt-in profiles. You will need to set up an assigned profile.
- If you have the HelpSystems Insite Deployment Manager and want to view a product's install logs, you'll be prompted to create an opt-in profile.

Creating an Opt-in Profile

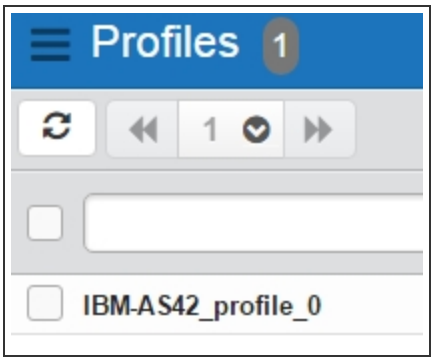
If you've logged on to Insite but don't have a profile assigned to a product connection, you can create an opt-in profile using the following steps.

1. Click a product option in the menu (Home, for example).
2. If you don't have an assigned profile for the product, a dialog appears and prompts you to sign on to the connected system using a valid IBM i user name and password.



If the credentials are accepted, Insite creates a profile for the system and stores it in Profiles under User Settings.

3. Navigate to the Profiles page and find your new opt-in profile. It'll look similar to this:



4. Click the profile to view its assigned details. From here, you can edit the alias to reflect a unique profile name or change the user name and password.
5. Click **Save**.

Adding a New Profile

Add profiles for the IBM i and Automate Enterprise systems that you need to access.

1. In the Navigation Pane, click **Profiles** under Account. If the menu is hidden, click .
2. Click **Add**.
3. Enter a **Name** for the profile. This is the name that's displayed in the HelpSystems Insite interface.
4. Enter a valid profile **User Name** and **Password** (and **Confirm Password**) for the IBM i system or BPA server that you need to access.

   > NOTE: This is the user who's checked for security in each product, and is also the one who's audited when actions are taken.

5. Click **Save**.

After you add profiles, you must assign them to the server connections in order to see the data from those systems.

Editing a Profile

To edit a profile for any of the systems you need to access:

1. In the Navigation Pane, click **Profiles** under Account. If the menu is hidden, click .
2. Click the profile you want to edit. Notice that the product connections that use this profile are listed at the bottom of the page.
3. Enter a different **Name** for the profile. This is the name that's displayed in HelpSystems Insite.
4. Change the **User Name** or **Password**, if needed. This must be a valid profile to access that system.

   > NOTE: This is the user who's checked for security in each product, and is also the one who's audited when actions are taken.

5. Click **Save**.

You must assign your profiles to connections in order to see the data from those systems.

Deleting Profiles

To delete one or more profiles:

1. In the Navigation Pane, click **Profiles** under Account. If the menu is hidden, click .
2. Select (check) one or more profiles to delete.
3. Click **Delete**.
4. Click **Delete** to confirm.

If you delete the profile that a product connection uses, you won't be able to see the data from that system until you assign another profile to it.

Preferences

The Preferences page allows you to configure your sessions to function in a way that's best for you. These are general preferences, such as setting the default homepage or dashboard. Preference settings only apply to the profile you're currently logged in under.

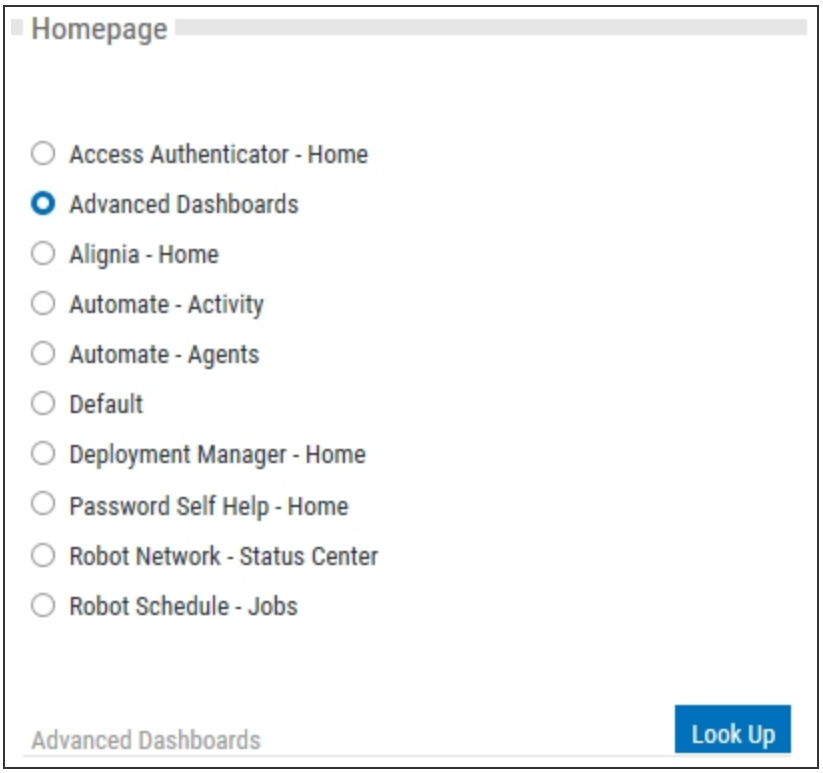
Getting There: In the Navigation Pane, click **Preferences** under Account. If the menu is hidden, click .

> NOTE: Each of the modules in HelpSystems Insite also have preferences specific to that product. For more information about those, see the user guide for that product.

Follow these steps to change your general preferences:

1. In the Navigation Pane, click **Preferences** under Account. If the menu is hidden, click .
2. Under Homepage, select the page you want to open when you log on to HelpSystems Insite.

   If you select "Dashboards," click **Look Up** to select the dashboard you want to see (the dashboards from all the products are available for you to select). If you select "Default," the Server Settings page is displayed.



3. Click **Save**.

About HelpSystems Insite

The About HelpSystems Insite page displays information about the system that Insite is installed on, and therefore, can be used when troubleshooting issues. It also shows the HelpSystems contact information.

The browser that ships with Windows Server 2012, Internet Explorer 10, is not supported. For more information and a full list of requirements, see HelpSystems Insite System Requirements.

Getting There: In the Navigation Pane, click **Diagnostics Page** under Account. If the menu is hidden, click  .

Other Pages

There are pages that are common to many of the products in HelpSystems Insite. They're described below.

Active Jobs

The Active Jobs page contains information about all of the jobs currently active on your IBM i server. For more information on active jobs, refer to the user guide for your product.

Job Log

The Job Log page displays the system messages associated with the job you selected. For more information on job logs, refer to the user guide for your product.

Job Attributes

The Job Attributes page displays detailed Status Attribute, Definition Attribute, Run Attribute, and Library List information for a job. Use this information for troubleshooting when job problems occur. For more information on job attributes, refer to the user guide for your product.

History Log (QHST)

The History Log page displays the contents of the job log associated with the job message history queue (QHST) for the selected job. For more information on the history log, refer to the user guide for your product.

Message Details

The Message Details page displays details for the selected job log message. You can access the message details when you're viewing the Job Log page or the History Log (QHST) page. For more information on message details, refer to the user guide for your product.

Spooled Files

The Spooled Files page displays a list of the spooled files on the current system. For more information on spooled files, refer to the user guide for your product.

Spooled File Properties

This page displays the properties for the selected spooled file and allows you to change certain properties. For more information on spooled file properties, refer to the user guide for your product.

Spooled File View

This page displays the text from the selected spooled file. You can view it, or search it for a string of characters. For more information on viewing a spooled file, refer to the user guide for your product.

Other Help

For help with other Insite components and products supported by HelpSystems Insite, refer to the following resources:

Alignia Monitoring Room for Insite User Guide

Authority Broker Administrator's Guide

AutoMate Ops Console User Guide

HelpSystems Insite User Guide

Network Security Administrator's Guide

Password Self Help for Insite User Guide

Robot Network for Insite User Guide

Robot Schedule for Insite User Guide

Webdocs for Insite User Guide