



WEBMETHODS.IO EMBED USER GUIDE

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1 Overview

webMethods.io Embed is a cloud-based embedded integration engine designed to enable your users to easily connect and integrate data from variety of systems, apps, and devices—all from within your application experience. By leveraging embedded integration-as-a-service, engineering teams can focus on building differentiating capabilities by making use of out-of-the-box connectors and offloading the infrastructure and maintenance challenges.

1.1 Key Benefits

- **In-app integrations with a seamless UX**
Embed easy-to-use, configurable integration widgets into your application interface to unlock powerful integrations with vast number of third-party apps without compromising your brand and user experience.
- **Faster time-to-market and increased productivity**
Building on a robust, easy to use integration platform lets your team realize efficiencies and deliver integrations faster.
- **Less development and maintenance costs**
With embedded integration, your engineering team can focus on building differentiated content and enhancing your product — let us handle infrastructure and maintenance.
- **New features and business opportunities**
Leverage integration to differentiate from your competitors and provide your customers with new ways to use your product and data.

2 Get Started with webMethods.io Embed

This section explains the process of integrating webMethods.io Embed with your application website.

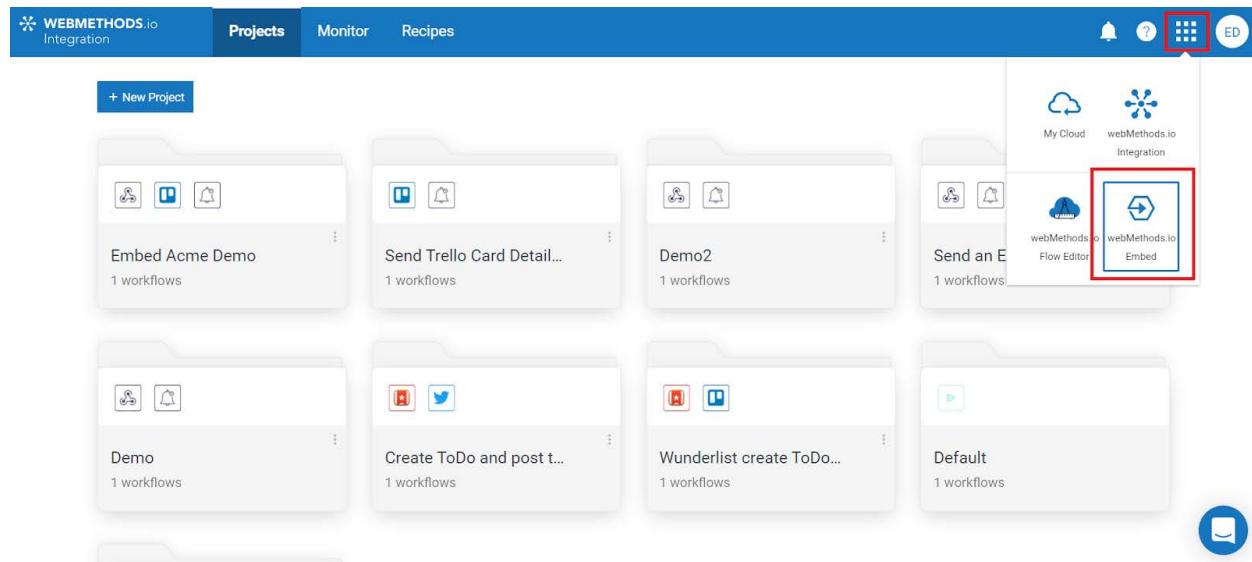
2.1 Set up webMethods.io Embed tenant

To use webMethods.io Embed, you will need a webMethods.io Integration tenant account. You can sign up for one [here](#).

Once you have signed up, send an email to support-wmio@softwareag.com from your registered email address requesting for the webMethods.io Embed feature.

2.2 Navigate to webMethods.io Embed Admin Portal

Once webMethods.io Embed is enabled for your tenant, you can see the ‘webMethods.io Embed’ option in the App Switcher panel.

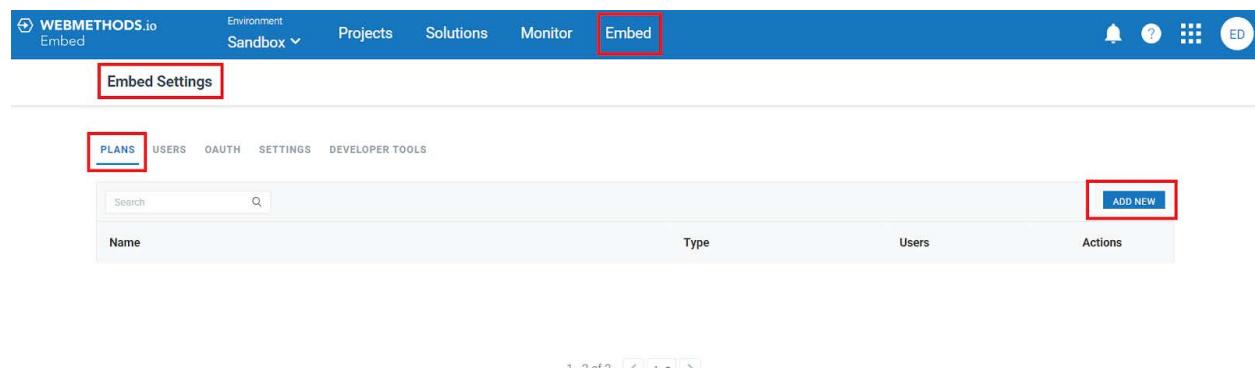


When you click on it, you will be redirected to the webMethods.io Embed admin portal. From here, you can configure the settings to integrate webMethods.io Embed with your application.

2.3 Create Default Plan in Admin Portal

The **Plans** tab allows you to define how many transactions and connectors are available under a specific plan, which you can then assign to one or more users.

To get started with configuration settings, you would first need to create a default plan. To do so, navigate to ‘Embed > Embed Settings > Plans’ and click on ‘Add New’.



A new window appears, through which you can create the default plan for your tenant.

Add New Plan

Name *

Plan Code *

Plan Type *

 individual

Default Type *

 false

Transactions *

 0

Connectors

 Select...

Name: Provide a name for the default plan.

Plan Code: Provide a unique ID for the plan.

Plan Type: Select the 'User' option and set the value for 'Default Type' field to 'true'.

Transactions: Specify the transaction limit for this plan.

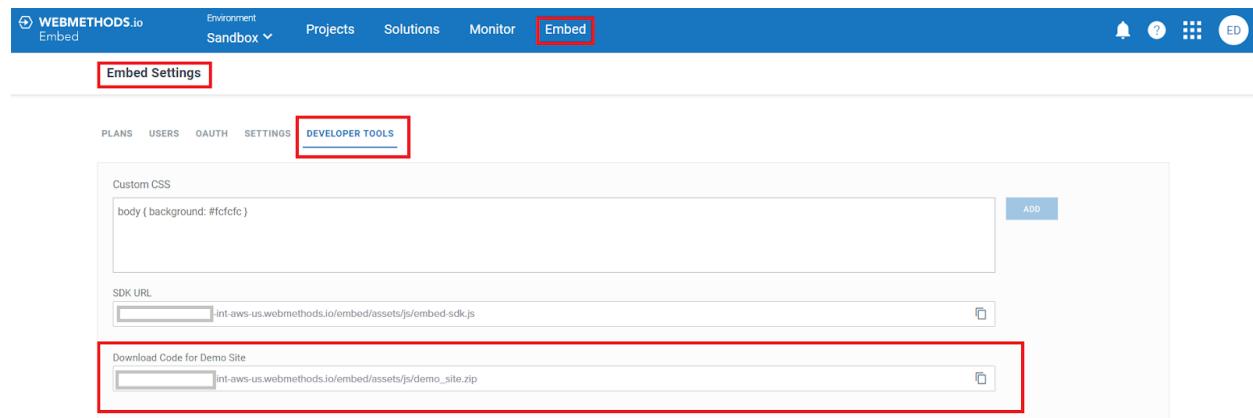
Connectors: Select the connectors you want to enable for this plan.

Once this is done, click 'Add'. This will create the default plan in your Embed Admin portal.

2.4 Download Demo Site Code

You can download the code for the demo application site developed by webMethods.io Embed. You can further tweak it as per your requirements or create your custom application site from scratch.

To download the demo site code, navigate to ‘Embed > Embed Settings > Developer Tools’ and locate the ‘Download Code for Demo Site’ field.



Copy the given link, paste it in a new browser tab, and press enter. The demo site code will get downloaded on your machine.

2.5 Connect Admin Portal with Demo Application

Once this is done, you can connect the webMethods.io Embed Admin Portal with your demo application. To do so, first extract the zipped demo site code file and navigate to ‘demo_site > public > js’ folder. Open the ‘script.js’ file in the editor of your choice and search for the ‘init()’ function.

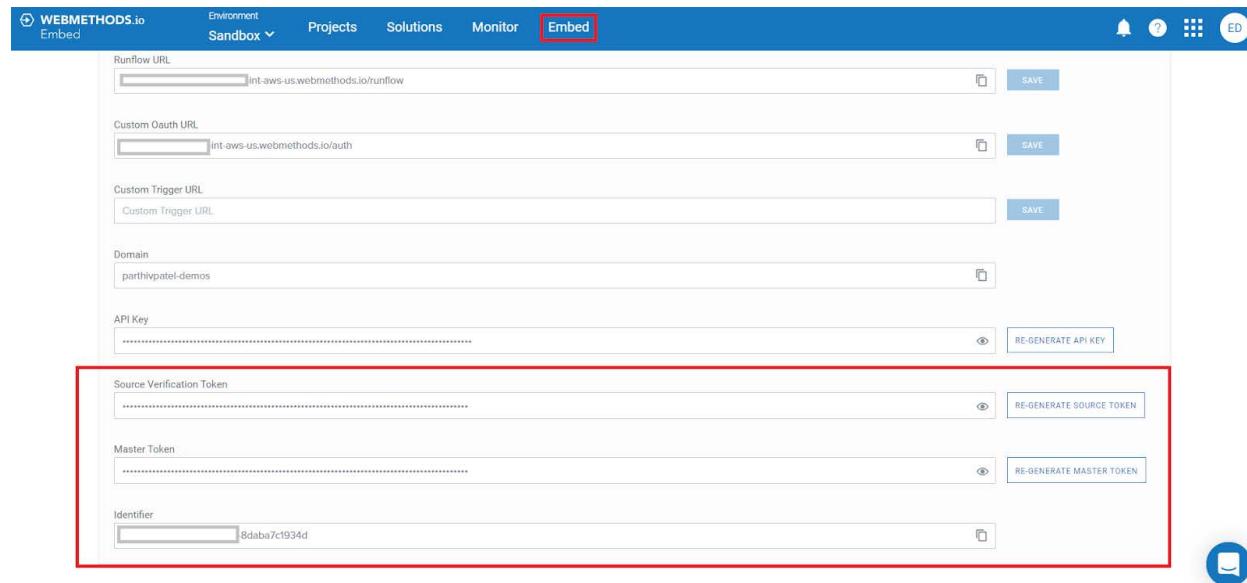
```

122     var d = localStorage.getItem('awt');
123     if(href != null && false){
124       window.Embed.login(d).then(()=>{ window.localStorage.removeItem('path'); window.location = href; },(err)=>{
125         console.log(err)
126       });
127     }
128     else{
129       window.Embed.login(d).then(()=>{ window.localStorage.removeItem('path'); window.location = '/'; },(err)=>{
130         console.log(err)
131       });
132     }
133   }
134 }
135
136 function init() {
137
138   window.Embed = FlowEmbed.init(
139     "<Identifier>", // Add Identifier key present inside the embed settings tab of your embed portal
140     "<Source Verification Token>", // Add Source Verification Token key present inside the embed settings tab of your embed portal
141     "<Master Token>", // Add Master Token key present inside the embed settings tab of your embed portal
142     "sandbox",
143     "v2",
144     null,
145     false
146   );
147
148   window.Embed.on('logout',function(){
149     logoutUser();
150   })
151 }
152
153 function logoutUser () {
154   localStorage.removeItem('awt');
155   localStorage.removeItem('synergy');
156   localStorage.removeItem('path');
157   localStorage.removeItem('user');
158   localStorage.removeItem('username');
159   window.location = '/';
160 }
161

```

Now, switch to your webMethods.io Embed Admin portal and navigate to ‘Embed > Embed Settings > Settings’. Scroll down to the bottom of the page and locate the following fields:

- Source Verification Token
- Master Token
- Identifier



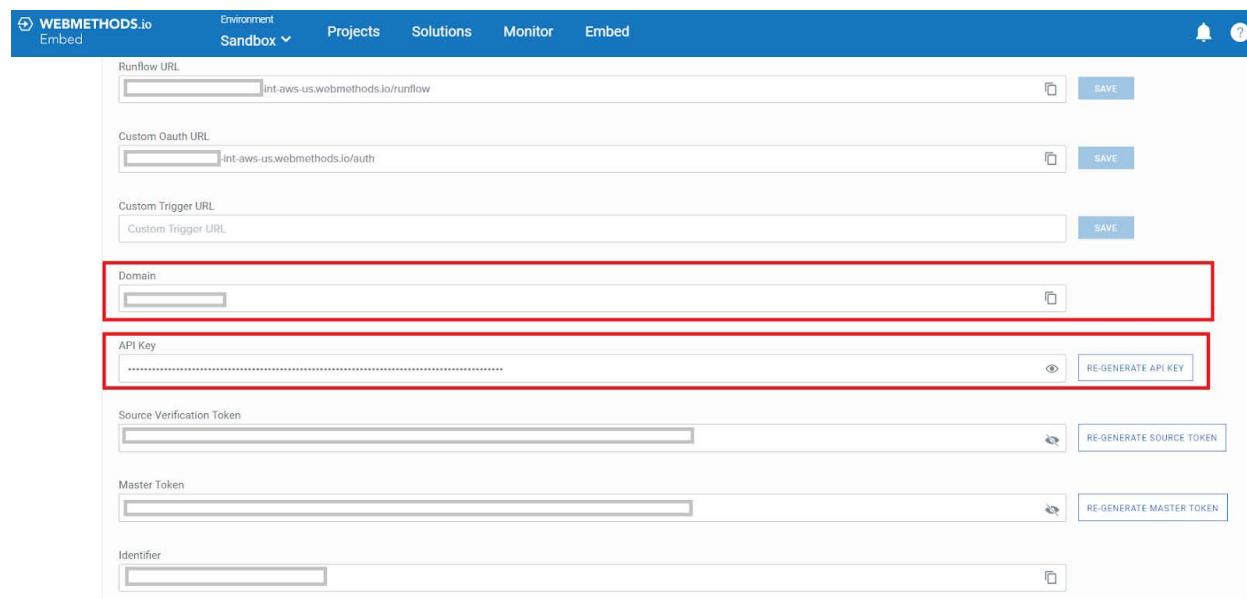
From here, copy the Identifier, Source Verification Token, and Master Token keys and replace them with the corresponding placeholder values in the init() function.

```

128
129     }
130     else{
131         window.Embed.login(d).then(()=>{ window.localStorage.removeItem('path'); window.location = '/' },(err)=>{
132             console.log(err)
133         })
134     }
135 }
136
137 function init(){
138     window.Embed = FlowEmbed.init(
139         "7168f054-7fb7-493f-8c54-8daba7c1959d", // Add Identifier key present inside the embed settings tab of your embed portal
140         "emdhrxXKz+VL9A9493c1EjqYmcATChOj0o7lb4YhLrtAqhn7rjyvtCTMGLQQoi/eECTGvLOGjooAlo1RUNoHs+cV+g==sv", // Add Source Verification Token key present inside
141         "the embed settings tab of your embed portal
142         "emd/I1hPWh4fx7AcouLt4QZ8j+k7mfdGh/htrR7m4gl2Rxfll76C68d2t1jtElltgno0bjVZ5FTmcr9q0DSOxhvQ==mt", // Add Master Token key present inside the embed
143         "sandbox",
144         "v2",
145         null,
146         false
147     );
148     window.Embed.on('logout',function(){
149         logoutUser();
150     })
}

```

Next, navigate to the ‘demo_site’ folder and open the ‘index.js’ file in the editor of your choice. Copy the ‘API Key’ and ‘Domain’ from the Admin Portal and replace them with the corresponding placeholder text value of the ‘var token’ and ‘domain’ respectively.



```

1 const express = require('express');
2 const path = require('path');
3 const fs = require('fs');
4 var token = process.env.API_KEY || "emdxMxD7as9krLE1t1sk6TYkw79dkMKCbj/nrFBVfSkOAIKY11/L1z2yRD7iiNO835fwbERn0hy7Z21Zwus+Bnz6A==api" // Add API Key present inside
5 let app = express();
6 var bodyParser = require('body-parser'),
7     jwt = require('jsonwebtoken'),
8     basicAuth = require('express-basic-auth');
9
10 app.use(basicAuth({
11   users: { '<USER_NAME>': '<PASSWORD>' }, // Add basic auth
12   challenge: true,
13   realm: '<RANDOM STRING>'
14 }));
15
16 app.use(bodyParser.urlencoded({ extended: true }));
17
18 app.get('/hello', (req, res) => res.send('Hello World!'));
19 app.use('/assets', express.static(path.join(__dirname, 'public', 'dist')));
20 app.use('/', express.static(path.join(__dirname, 'public')));
21 app.get('/services', (req,res) => res.sendFile(path.join(__dirname , 'public', 'partials', 'all-services.html')));
22 app.use('/integrations/:id/:uid/edit/provider', (req,res)=>{
23   return res.sendFile(path.join(__dirname , 'public', 'partials', 'edit-integration.html'));
24 })
25 app.use('/integrations/:id/:uid', (req, res) => res.sendFile(path.join(__dirname , 'public', 'partials', 'add-integration.html')));
26 app.get('/integrations/:id', (req,res) => res.sendFile(path.join(__dirname , 'public', 'partials', 'integrations-list.html')));
27 app.use('/my-integrations', (req, res) => res.sendFile(path.join(__dirname , 'public', 'partials', 'my-integrations.html')));
28
29 app.get('/execution-logs', (req,res) => res.sendFile(path.join(__dirname , 'public', 'partials', 'execution-logs.html')));
30 app.get('/login', (req, res) => res.sendFile(path.join(__dirname , 'public', 'partials', 'login.html')));
31 app.get('/postlogin', (req,res) => res.sendFile(path.join(__dirname , 'public', 'partials', 'post-login.html')));
32
33 app.post('/submit', (req, res) => {
34   console.log(req.body);
35   if(req.body.email && req.body.password && req.body.password === "<PASSWORD>") { // Add password for your demo site login
36     const user = {
37       email : req.body.email
38       domain : 'demo-app', // Add Domain key present inside the embed settings tab of your embed portal
39       plan : '',
40       account : ''
41     }
42   }
43 })

```

Now, switch back to the Admin portal and set the 'Runflow URL' and 'Custom OAuth URL'.

The Runflow URL is used to execute the workflows which run on webhooks. To set up the Runflow URL, enter your tenant URL in the 'Runflow URL' field and append '/runflow' after it. For example, if your tenant URL is '<https://demo.int-aws-us.webmethods.io>' then your 'Runflow URL will be '<https://demo.int-aws-us.webmethods.io/runflow>'.

The Custom OAuth URL is used to display your users the custom OAuth screen based on your company branding while creating the authorization. To set up the Custom OAuth URL, enter your tenant in the 'Custom OAuth URL' field and append '/auth' after it. So your 'Custom OAuth URL' will be '<https://demo.int-aws-us.webmethods.io/auth>'.

Note: It is recommended that you proxy the runflow URL and Custom OAuth URL associated with your domain to our domain for a seamless user experience.

Note: If you re-generate keys, you would need to update the re-generated keys into your integration code; otherwise your Embed application may not work.

Site URL: SAVE

Please enter a valid URL. E.g. 'https://flow.example.com'

Runflow URL: SAVE

Custom Oauth URL: SAVE

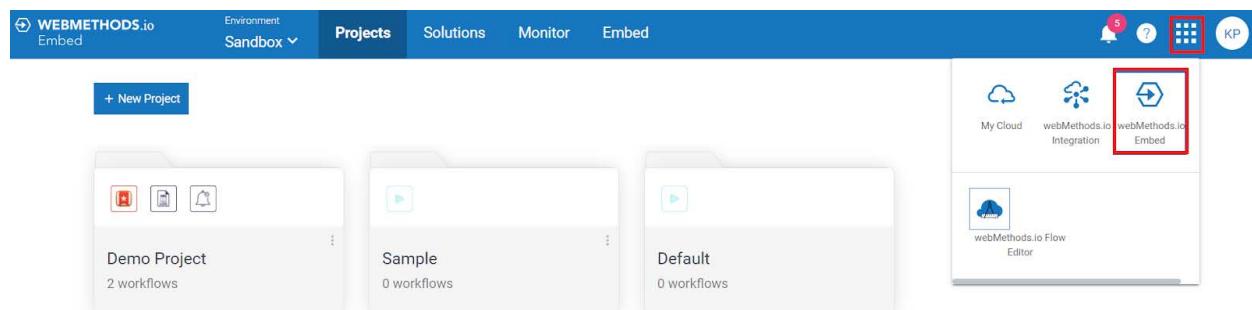
With this, your application is successfully integrated with webMethods.io Embed. You can now start creating solutions and publishing them on the sandbox and production environments of your application.

Note: For the solutions to work, ensure that you have created an OAuth for every relevant connector in the Admin Portal first.

You can find more details on how to use the Admin Portal in the next section.

3 Understanding Embed Admin Portal

The Embed Admin allows you to integrate with your website/application. To access the Embed Admin portal, log in to your webMethods.io Integration tenant account, click on the 'App Switcher' icon, and select webMethods.io Embed from the list of options that appear.



You will be redirected to the Embed Admin dashboard.

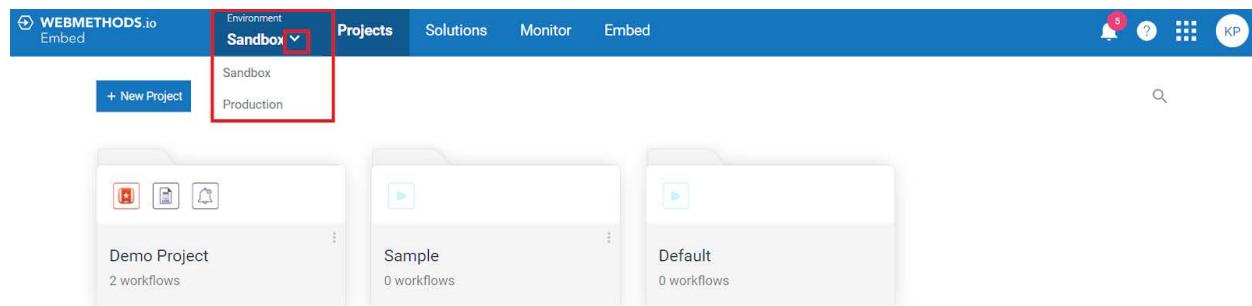
At the top of this dashboard, you can see five main menus:

1. **Environment:** Set environment for Embed Admin
2. **Projects:** Create new projects and solutions
3. **Solutions:** Manage existing solutions
4. **Monitor:** View tenant account usage information
5. **Embed:** Configure Embed Admin settings and view app usage information

Now let's understand these menus in detail.

3.1 Environment

webMethods.io Embed provides two types of environments that you can set for your Embed Admin: 'Sandbox' and 'Production'. Using the drop-down icon given below the 'Environment' menu, you can switch between these environments and manage their respective settings.



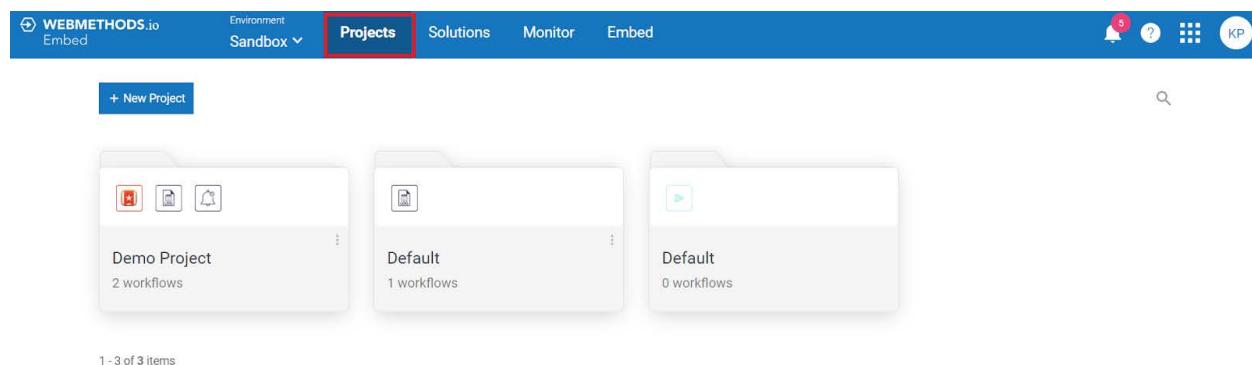
- Sandbox: Used to test your Embed Admin configurations
- Production: Used to manage Embed Admin settings for the live site

3.2 Projects

- You can create custom workflows under your Embed Admin projects, submit those projects as solutions on Embed Admin, and publish those solutions on to your app, to make them available to some or all app users. Users can then import any of these solutions to their personal account and use them as per their requirements.

The **Projects** menu lets you do the following:

- Create new projects and update existing projects
- Create and publish solutions
- Update existing solutions

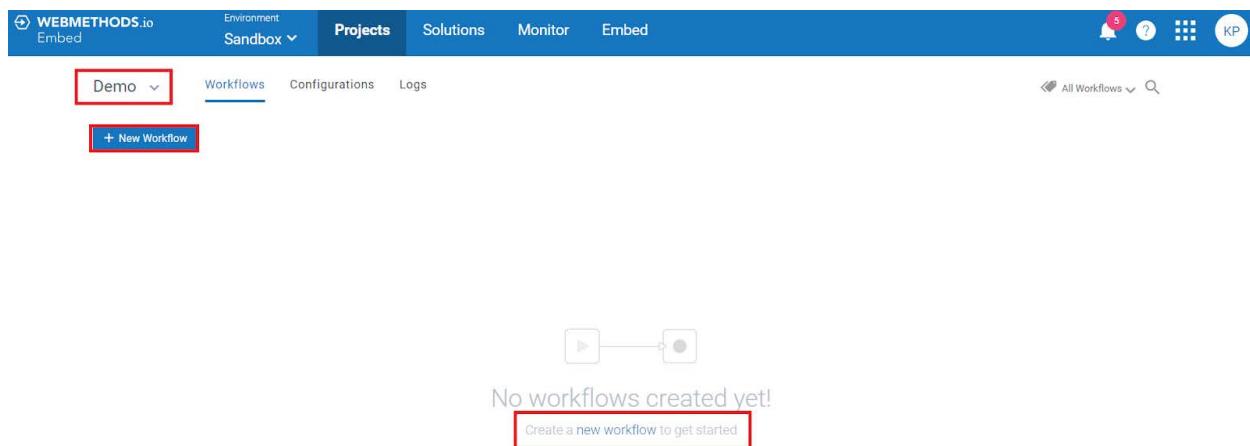


3.2.1 Creating or updating projects

To create a new project, click on the '+ New Project' button. You will be prompted to provide a name for the project.

A modal dialog box titled 'New Project'. It contains a 'Project Name' field with the value 'Demo'. At the bottom are 'Cancel' and 'Create' buttons.

Once you have entered the Project Name, click 'Create'. This will create a new project in your Embed Admin account.

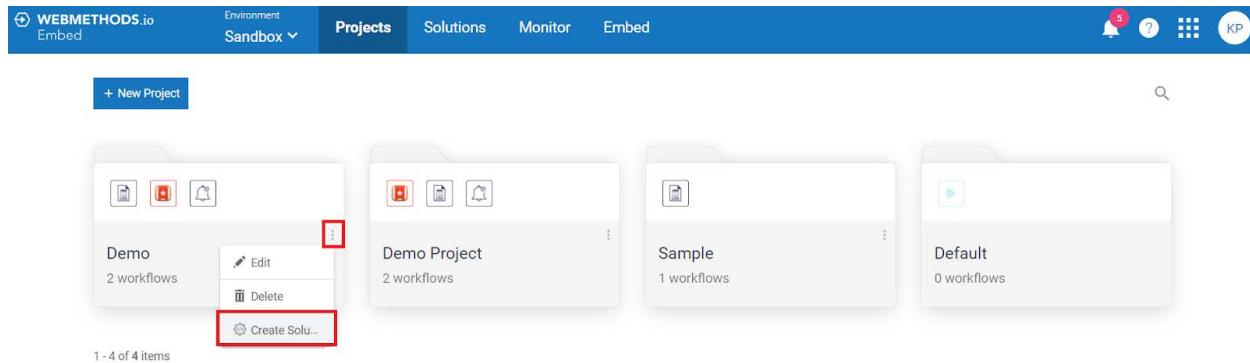


You can now start creating workflows within this project and can make changes to the pre-existing project workflows.

3.2.2 Creating and publishing solutions

You can submit your existing projects as solutions to Embed Admin and can publish those solutions on your app to enable them for your users.

To do so, locate the card associated with the project you want to submit as a solution, and click on the vertical ellipsis icon (three tiny dots) in the top-right corner. From the list of options that appear, click on the 'Create Solution' option.



A 'Create Solution' dialogue box appears on screen where you can provide details such as, solution name and solution description.

Create Solutions

Solution Name *

B I U A

Write Something...

[Cancel](#) [CREATE](#) [CREATE AND PUBLISH](#)

Once you have entered these details, click on 'CREATE' to create a new solution or click on 'CREATE AND PUBLISH' to create a solution and then publish it on to your Sandbox environment.

3.2.3 Updating existing solutions

You can also update the details of an existing solution. To do so, locate the solution, and click on the vertical ellipsis icon. From the list of options that appear, click on the 'Update Solution' option.

The screenshot shows the WEBMETHODS.io interface with a blue header bar. The header includes the logo, the URL 'WEBMETHODS.io', an 'Embed' button, and a dropdown menu for 'Environment' with 'Sandbox' selected. On the right side of the header are icons for notifications (with 5), help, and user profile ('KP'). Below the header, there's a search bar and a button for '+ New Project'. The main content area displays four project cards: 'Demo' (2 workflows), 'Demo Project' (2 workflows), 'Default' (1 workflow), and another 'Default' entry (0 workflows). Each card has edit, delete, and update solution buttons. The 'Update Solu...' button for the first 'Demo' project is highlighted with a red box.

A new dialogue box appears where you can update the solution details such as the Solution Name and Description.

Update Solutions

Solution Name *

Send Wunderlist list via email

B I U A |

Write Something...

Cancel **UPDATE** **UPDATE AND PUBLISH**

Once you have entered the details, click on ‘Update’ to update the solution details or click on ‘Update and Publish’ to update the solution details and then publish it on to your sandbox environment.

3.3 Solutions

The **Solutions** tab lets you view and manage the existing solutions of your Embed Admin account.

Solutions	Instances	Published	Published on	Actions
Send Wunderlist list via email	0	ON	08/22/2019	
Send Wunderlist tasks via email	0	ON	08/20/2019	

This page contains a list of the existing solutions (published and unpublished) along with the following details:

- **Solutions:** Name of the solution
- **Instances:** Number of times the solution has been instantiated by users

- **Published:** Whether the solution has been published on the service website. You can use the toggle button to publish or unpublish the workflows.
- **Published on:** The date on which the solution was published.
- **Actions:** Contains action controls to manage solutions.
 - **Deploy to Production:** Deploy the associated solution on to the production environment of your website/application.
 - **Edit Solution Schema:** Edit the solution schema.
 - **Delete Solution:** Delete the associated solution from Embed Admin.

3.3.1 Managing solution versions

Each time you update an existing solution, a new version of that solution is created. You can access all the versions associated with any particular solution by clicking on the solution name.

This will redirect you to the 'VERSIONING' page.



Versions	Created	Published	Actions
Version 2	08/22/2019	ON <input checked="" type="checkbox"/>	
Version 1	08/22/2019	OFF <input type="checkbox"/>	

This page contains the following columns:

- **Versions:** Version number of the solution.
- **Created:** Date on which the version was created.
- **Published:** Whether the selected version is published on production website/application.
- **Actions:** Contains action controls to manage solution versions.
 - **Deploy:** Deploy the published version on production environment.
 - **Delete:** Delete the selected version from Embed Admin. This will delete the solution version along with its deployments (if any).

3.3.2 Managing User Deployments

Each time a solution is instantiated by a user, an instance of that solution is created against their name and is added to the 'Users' tab. From here, you can view which user has instantiated a particular solution how many times, and remove the user from Embed Admin.

Email	Instances	Actions
[REDACTED]	1	
[REDACTED]	3	
[REDACTED]	2	
[REDACTED]	3	

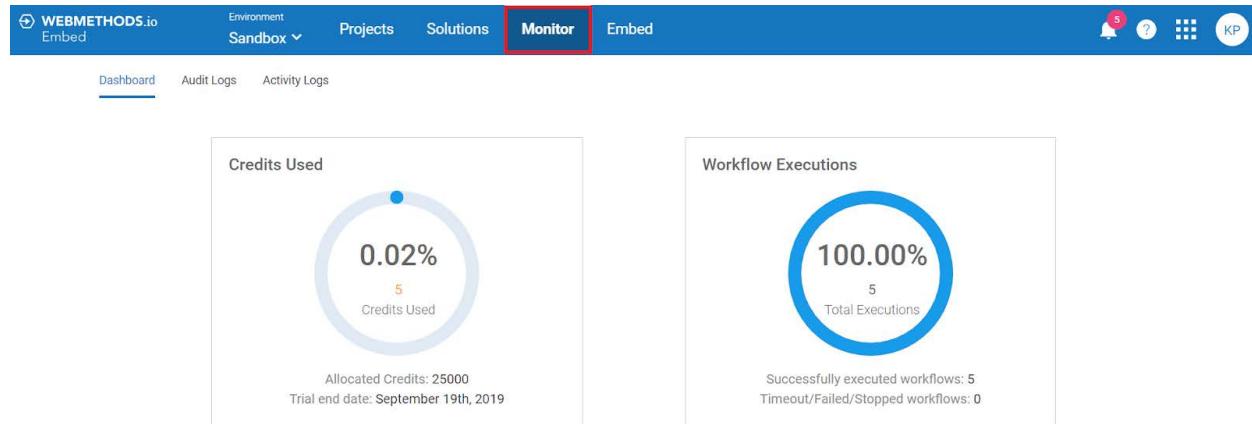
This page contains the following columns:

- **Email:** Email ID of the user who instantiated the selected solution.
- **Instances:** Number of times the user has so far instantiated the solution.
- **Actions:** Contains action controls to manage solution versions.
 - **Delete:** Delete the selected user from Embed Admin.

3.4 Monitor

The ‘Monitor’ menu lets you track and monitor the overall workflow execution status, consumed credits, and user activities of your Embed Admin portal tenant. The Monitor screen has three tabs from where you can perform the following operations:

- Dashboard
- Audit Logs
- Activity Logs

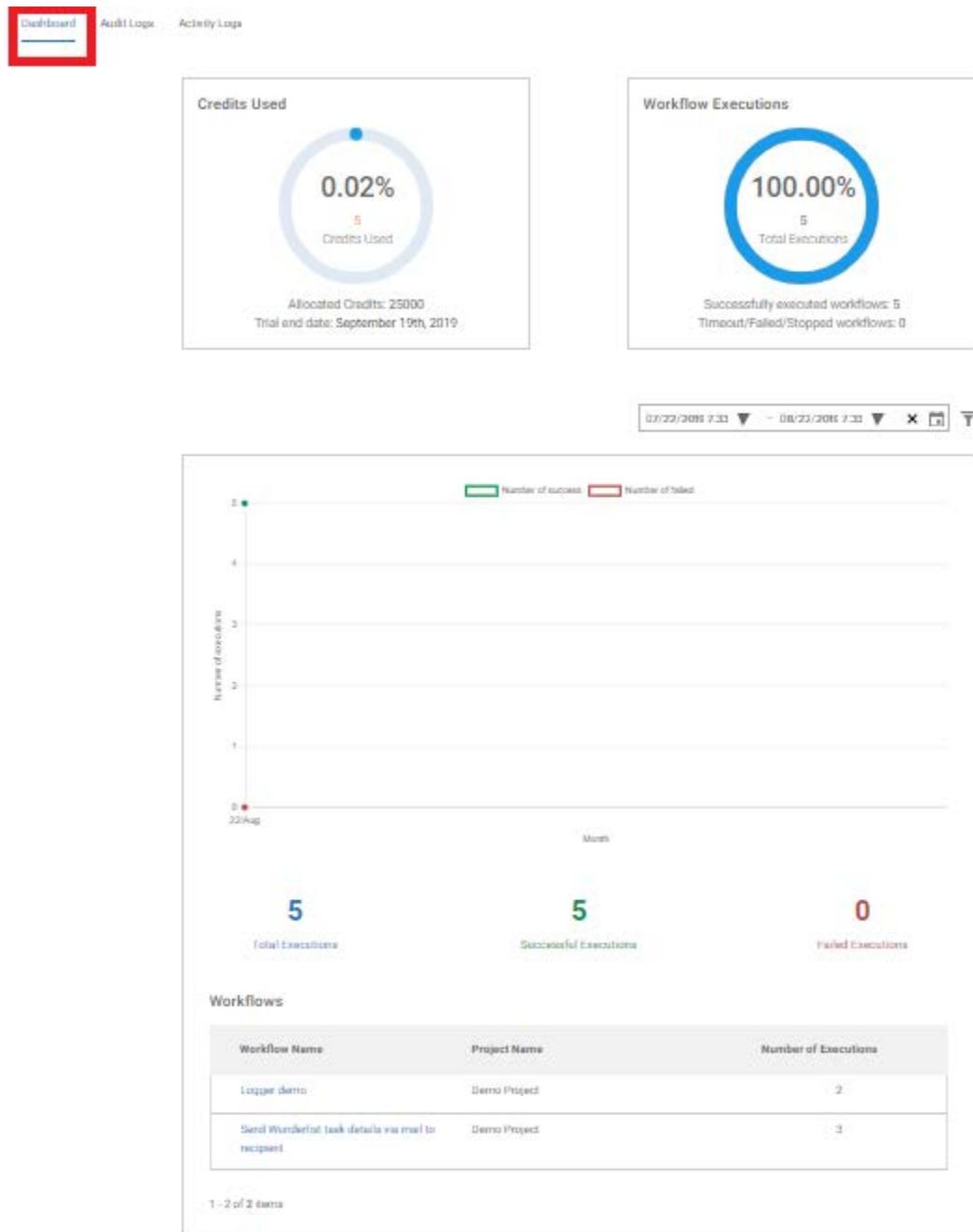


3.4.1 *Embed Admin tenant usage statistics dashboard*

The **Dashboard** tab lets you view the credits and workflow execution related data in graphical format.

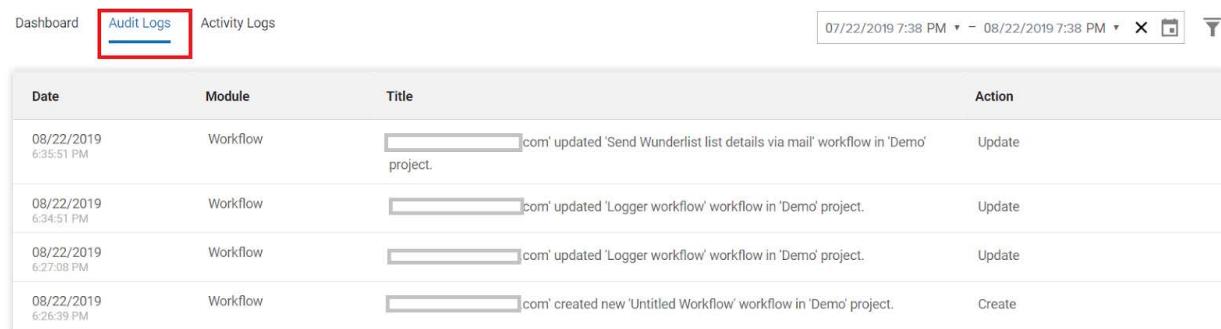
From this tab you can:

- View the total credit consumption for the current month out of the allocated credits
- View total workflow executions for the current month
- View the workflow execution log for each workflow



3.4.2 *Embed Admin tenant audit logs*

The **Audit Logs** tab lets you view the records of all activities performed by the Embed Admin tenant users. It keeps track of the tasks and changes performed by the users of your tenant. It maintains a history of all the actions that are performed within the tenant, including details such as the type of action performed, user performing the action, and date/time.

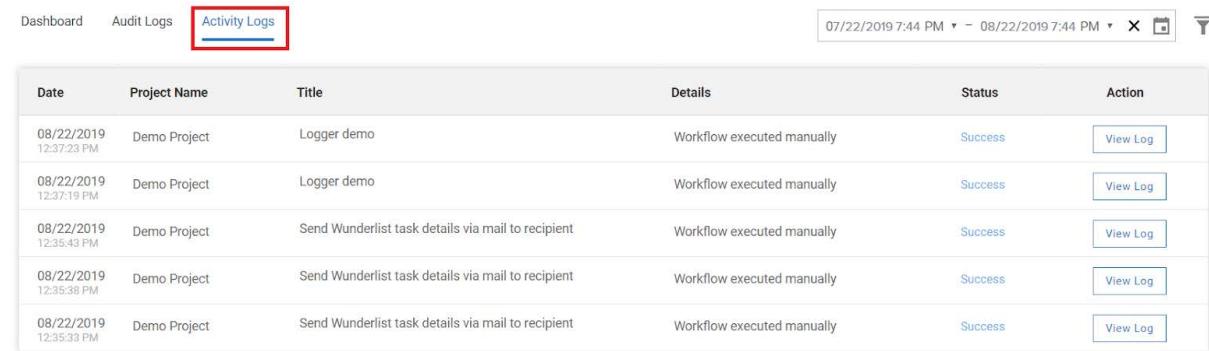


The screenshot shows the Audit Logs tab interface. At the top, there are three tabs: Dashboard, Audit Logs (which is highlighted with a red box), and Activity Logs. Below the tabs is a search bar with the date range "07/22/2019 7:38 PM - 08/22/2019 7:38 PM" and a clear button. The main area is a table with columns: Date, Module, Title, and Action. The data in the table is as follows:

Date	Module	Title	Action
08/22/2019 6:35:51 PM	Workflow	[REDACTED]com updated 'Send Wunderlist list details via mail' workflow in 'Demo' project.	Update
08/22/2019 6:34:51 PM	Workflow	[REDACTED]com updated 'Logger workflow' workflow in 'Demo' project.	Update
08/22/2019 6:27:08 PM	Workflow	[REDACTED]com updated 'Logger workflow' workflow in 'Demo' project.	Update
08/22/2019 6:26:39 PM	Workflow	[REDACTED]com created new 'Untitled Workflow' workflow in 'Demo' project.	Create

3.4.3 *Embed Admin tenant activity logs*

The **Activity Logs** tab lets you view the sequence of all the activities related to the workflows of your account. The log records include details such as the timestamp, title, execution status, as well as an option to view the detailed log.



The screenshot shows the Activity Logs tab interface. At the top, there are three tabs: Dashboard, Audit Logs, and Activity Logs (which is highlighted with a red box). Below the tabs is a search bar with the date range "07/22/2019 7:44 PM - 08/22/2019 7:44 PM" and a clear button. The main area is a table with columns: Date, Project Name, Title, Details, Status, and Action. The data in the table is as follows:

Date	Project Name	Title	Details	Status	Action
08/22/2019 12:37:23 PM	Demo Project	Logger demo	Workflow executed manually	Success	<button>View Log</button>
08/22/2019 12:37:19 PM	Demo Project	Logger demo	Workflow executed manually	Success	<button>View Log</button>
08/22/2019 12:35:43 PM	Demo Project	Send Wunderlist task details via mail to recipient	Workflow executed manually	Success	<button>View Log</button>
08/22/2019 12:35:38 PM	Demo Project	Send Wunderlist task details via mail to recipient	Workflow executed manually	Success	<button>View Log</button>
08/22/2019 12:35:33 PM	Demo Project	Send Wunderlist task details via mail to recipient	Workflow executed manually	Success	<button>View Log</button>

1 - 5 of 5 items

You can also export the execution logs of a specific workflow, by navigating to 'View Log > Export Log'.

Send Wunderlist task details via mail to recipient

Date: August 22, 2019 Credits: 1 Container: 256 MB Total run time: 01.0 sec					Success
Logs	Start	End	Duration	Elapsed	
start: Start	12:35:44	12:35:44	00.004 sec	00.004 sec	
\$a0: Send an Email	12:35:44	12:35:44	00.250 sec	00.254 sec	
stop: Stop	12:35:44	12:35:44	00.001 sec	00.255 sec	

Close **Export Log**

3.5 Embed

The **Embed** menu lets you configure the Embed Admin panel, set up usage alerts, and get an overview of the usage statistics for your application/website. When you click on the 'Embed' tab, you can see the following options:

- Embed Settings
- Metrics
- Alerts

WEBMETHODS.io Embed

Monitor **Embed**

Dashboard Audit Logs Activity Logs

Credits Used: 4.65% (2324 Credits Used) Allocated Credits: 50000

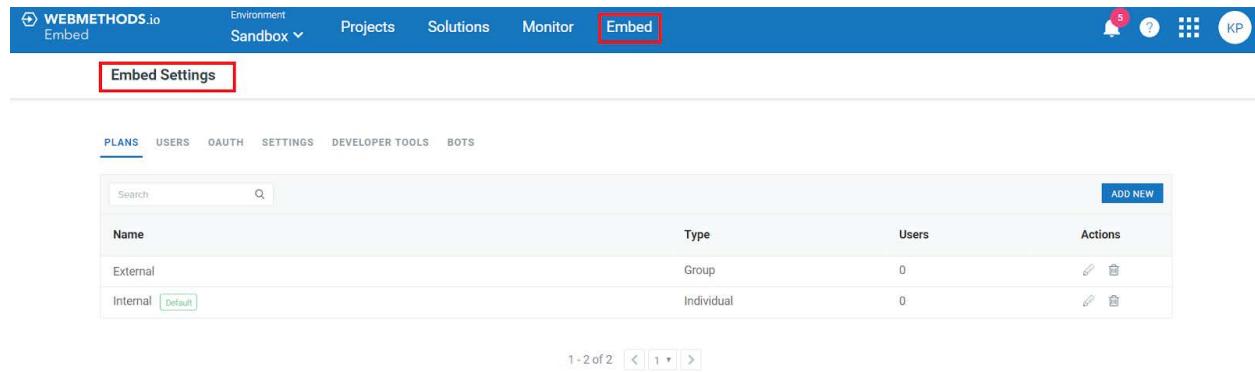
Workflow Executions: 42.01% (27323 Total Executions) Successfully executed workflows: 11478 Timeout/Failed/Stopped workflows: 15799

Embed Settings
Metrics
Alerts

Let's look at these options in detail.

3.5.1 *Embed Settings*

Before you integrate webMethods.io Embed into your website/application, you will need to configure the settings in your Embed Admin panel. To do so, navigate to 'Embed > Embed Settings' page.



Name	Type	Users	Actions
External	Group	0	
Internal <small>[Default]</small>	Individual	0	

Here you can see various configuration options provided by webMethods.io Embed. Let us understand these options in detail.

3.5.1.1 Plans

The 'Plans' menu lets you create custom plans for your application users. There are two types of plans:

1. Individual: The 'Individual' plan lets you define the total number of transactions an individual user can execute. This plan can then be assigned to one or more users.

For example, suppose a User plan 'Plan 1' has a transaction limit of 100 transactions. When you assign this plan to users A and B, they both can execute upto 100 transactions each.

Using 'Plans' menu, you can create multiple Individual plans.

2. Group: A 'Group' plan can contain one or more users. The 'Group' plan lets you define the total number of transactions that can be executed by a number of users belonging to the same group.

For example, suppose a Group plan, 'Plan 2' has a transaction limit of 200. When you assign this plan to 5 users, all of them can jointly execute upto 200 transactions.

Using 'Plans' menu you can create multiple 'Group' plans.

Adding new plans

To add a new plan, do the following:

1. Click on the 'Add New' button at the top-right corner of the 'PLANS' screen.

The screenshot shows the webMethods.io Embed interface. At the top, there's a navigation bar with links for 'Environment', 'Sandbox', 'Projects', 'Solutions', 'Monitor', and 'Embed'. The 'Embed' link is highlighted with a red box. Below the navigation bar, there's a sub-menu titled 'Embed Settings' with a red box around it. The main content area has tabs for 'PLANS', 'USERS', 'OAUTH', 'SETTINGS', and 'DEVELOPER TOOLS'. The 'PLANS' tab is selected. It displays a table with two rows:

Name	Type	Users	Actions
External	Group	0	
Internal [Default]	Individual	0	

At the bottom of the table, there's a pagination indicator '1 - 2 of 2' and a set of navigation arrows.

A new window will appear.

The screenshot shows the 'Add New Plan' form. It has several input fields with validation stars (*):

- Name ***: An empty text input field.
- Plan Code ***: An empty text input field.
- Plan Type ***: A dropdown menu currently showing 'individual'.
- Default Type ***: A dropdown menu currently showing 'false'.
- Transactions ***: An empty text input field containing the number '0'.

At the bottom right of the form are two buttons: 'Cancel' and 'Add'.

Name: Provide a unique name for the plan.

Plan Code: Provide a unique ID for the plan.

Plan Type: Select the type of plan ('individual' or 'group') you want to create.

If you Select 'individual', you will need to specify if you want to set this plan as the default plan for all users, in the 'Default Type' field.

Transactions: Specify the transaction limit for this plan.

Connectors: Select the connector(s) you want to enable for this plan.

Add New Plan

Name *

Plan Code *

Plan Type *

Individual

Default Type *

false

Transactions *

Cancel Add

Once you have entered these details, click 'ADD'. This will create the specified plan.

Editing or Deleting plans

You can also edit or delete an existing plan. To do so, navigate to 'Embed Admin Portal > Embed > Embed Settings > Plans'.

Embed Settings

PLANS USERS OAUTH SETTINGS DEVELOPER TOOLS

Name	Type	Users	Actions
External	Group	0	
Internal Default	Individual	0	

1 - 2 of 2

You will see a list of existing plans associated with your application, along with the following details:

- **Name:** Name of the plan. If a user plan is set as a default plan, a 'Default' tag is displayed beside the plan name.
- **Type:** Type of the plan (Individual/Group).
- **Users:** Number of users associated with the plan.
- **Actions:** Contains action controls to manage plans.

- **Edit:** To modify the plan name, transaction limit, or the connectors enabled for the plan.
Note: The updated transaction limit cannot be lesser than the maximum number of transactions already consumed under the plan.
- **Delete:** To delete the plan from Embed Admin.

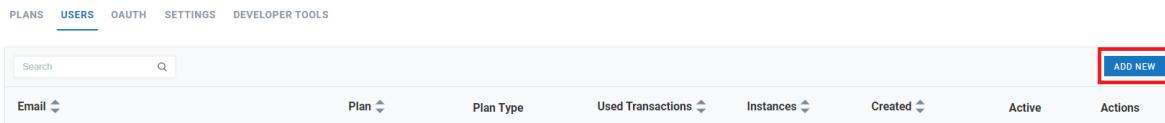
Click on the 'Edit' or 'Delete' options to modify or delete the plan from Embed Admin.

3.5.1.2 Users

You can add, view and manage users of your application using the 'USERS' menu. To do so, navigate to 'Embed Admin Portal > Embed > Embed Settings > USERS'.

Adding new users

You can add a new user by clicking the ADD NEW button located at the top-right corner of the Users screen.



A new window will appear on screen, where you will be prompted to enter the following details:

Add Embed User

Email ID *

Plan Type *

individual

Plan *

Please Select

[Cancel](#) [Add](#)

- **Email ID:** Enter the email ID of the user you want to add.
- **Plan Type:** Select the type of plan (individual/group) you want to assign to the user.
- **Plan:** Select the plan you want to assign to the user

Once this is done, click on Add button.

This will add the user to the list of Embed users. Now when you navigate to the USERS screen, you will see the following details associated with the added user.

PLANS	USERS	OAUTH	SETTINGS	DEVELOPER TOOLS
<input type="text"/> <input type="button"/>	<input type="button"/> ADD NEW			

Email	Plan	Plan Type	Used Transactions	Instances	Created	Active	Actions
jane.doe@example.com	Internal	individual	0	0	04/08/2020	<input checked="" type="checkbox"/>	

- **Email:** Email address of the user.
- **Plan:** Plan assigned to the user.
- **Plan Type:** Type of plan (individual/group) assigned to the user.
- **Used Transactions:** Total number of transactions used by the user.
- **Created:** Date on which the user was created in the system.
- **Active:** Activate or deactivate a specific user. If you deactivate a user, all their deployments will also be deactivated. Moreover, they will not be able to login to the associated application/website till the time they are activated again.

- **Actions:** Contains action controls to manage users.
 - **Edit:** To change the plan assigned to the user.
 - **Delete:** To delete the user. When you delete a user, all the entities associated with them such as workflows, triggers, authorizations will also be permanently deleted from the Embed Admin portal.

Updating user plan

You can also update the plan assigned to a user at any time. To do so, click on the 'USERS' menu listed under the 'Embed Settings' option. You will see a list of all users of your application. Locate the user whose plan you want to change and click on the 'Edit' icon listed against the user's name. A new window will appear on screen.

The screenshot shows a blue header bar with the text 'Edit User Details'. Below it is a form field labeled 'Change User Plan *'. A dropdown menu is open, showing the value 'Internal'. At the bottom right of the dialog are two buttons: 'Cancel' and 'Save'.

Select the plan you want to assign to the user from the 'Change User Plan' drop-down list and click 'Save'.

The screenshot shows a blue header bar with the text 'Edit User Details'. Below it is a form field labeled 'Change User Plan *'. A dropdown menu is open, listing four options: 'Internal' (marked as 'individual'), 'GRP_Plan_203_new' (marked as 'group'), 'GrpPlan203' (marked as 'group'), and 'newstoryplan_edit' (marked as 'individual'). At the bottom right of the dialog are two buttons: 'Cancel' and 'Save'.

This will change the user's current plan.

Managing user instances

You can also manage the instances associated with a particular user through the USERS screen. To do so, click on the user email ID.



The screenshot shows the 'USERS' tab selected in the top navigation bar. A table lists users with columns: Email, Plan, Plan Type, Used Transactions, Instances, Created, Active, and Actions. The 'Email' column header is highlighted with a blue background. A red box highlights the row for 'DemoUser'. The 'Actions' column contains icons for edit and delete.

You will be redirected to a new screen where you will see the list of all instances created by the user along with their version and creation details.



The screenshot shows a 'User Execution Statistics' section with a table of deployment instances. The table has columns: Instance Name, Version, and Created. The 'Created' column header is highlighted with a blue background. A red box highlights the 'User Execution Statistics' link in the top right corner. Another red box highlights the 'eye' icon in the 'Actions' column of the first instance row.

- User Execution Statistics: Get the overall sdk deployment execution statistics of the selected user for the specified timeframe.
- Export Deployment: Download the JSON file for the selected sdk deployment as a backup to your local machine.
- Show Workflow Execution Statistics: Get the execution statistics of the selected sdk deployment for the specified timeframe (up to one month). Also, if you click the deployment name, you can view the execution statistics related to that particular deployment.

3.5.1.3 OAuth

You can create custom OAuths for the services supported by webMethods.io Embed for your website/application.

Embed Settings

Connector Name	Active	Actions
Wunderlist	<input checked="" type="checkbox"/>	
Asana	<input checked="" type="checkbox"/>	

1 - 2 of 2

ADD NEW

You can see the list of service OAuth associated with your application, along with the following details:

- **Active:** Select or clear the check box to activate or deactivate OAuth for your application.
- **Actions:** Contains action controls to manage OAuths.
 - **View:** To View the OAuth details.
 - **Delete:** To delete the OAuth from Embed Admin (and from the application).

Adding a new OAuth

You can create a new OAuth for a third-party service supported by webMethods.io Embed. To create a new OAuth, click on the 'Add new' button at the top-right corner of the 'OAuth' page. A new 'Add New OAuth' window appears.

Add New Oauth

Oauth Name *

- Basecamp
- Bitbucket
- Bitbucket
- Bitly
- Box

Cancel Done

OAuth Name: Select/specify the name of the service for which you want to create an OAuth. Once you create an OAuth for a service, its name will be removed from the 'OAuth Name' dropdown list.

Once you have specified the service name, you can see three additional fields in the form:

Add New Oauth

Dropbox

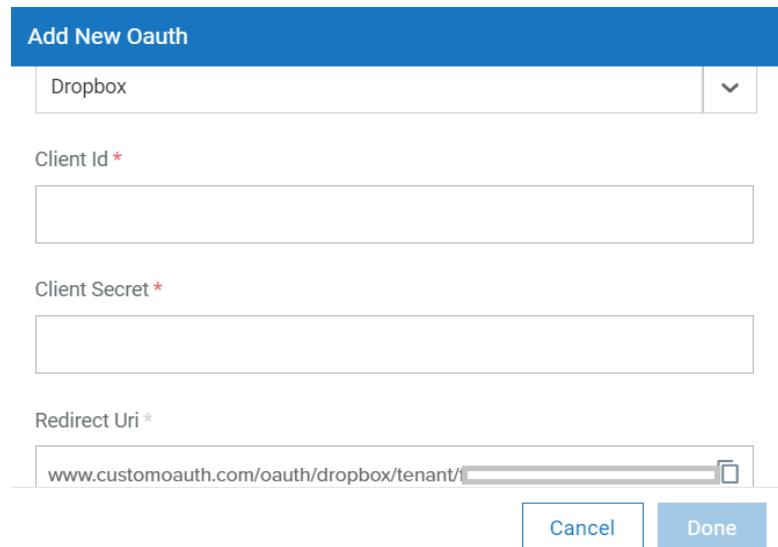
Client Id *

Client Secret *

Redirect Uri *

www.customoauth.com/oauth/dropbox/tenant/

Cancel Done



Redirect URI: Copy and then paste this URL in your third-party service app.

Client Secret: Enter the client secret associated with your third-party service app.

Client ID: Enter the client ID associated with your third-party service app.

Dropbox

Documentation Guides Community & support

webMethods.io Embed App

Settings Branding Analytics

Status Development Apply for production

Development users Only you Enable additional users

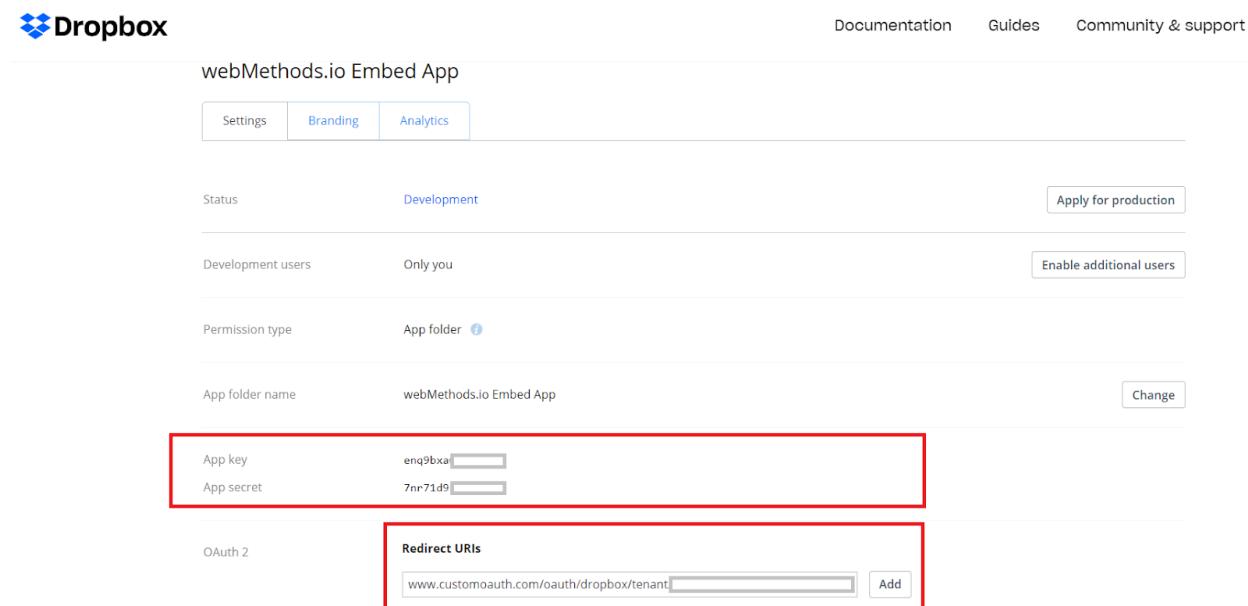
Permission type App folder ⓘ

App folder name webMethods.io Embed App Change

App key enq9bxa Change
App secret 7nr71d9 Change

OAuth 2 Redirect URIs Add

www.customoauth.com/oauth/dropbox/tenant/



Once you have entered these details, click 'Done'. This will create an OAuth for the specified service in your Embed Admin.

Note: You can create only one OAuth for a service in Embed Admin.

Embed Settings

PLANS USERS OAUTH SETTINGS DEVELOPER TOOLS

Connector Name	Active	Actions
Dropbox	<input checked="" type="checkbox"/>	
Wunderlist	<input checked="" type="checkbox"/>	
Asana	<input checked="" type="checkbox"/>	

1 - 3 of 3 1

Viewing or Deleting OAuth

You can also view and delete an existing OAuth for a particular third-party service.

Embed Settings

PLANS USERS OAUTH SETTINGS DEVELOPER TOOLS

Connector Name	Active	Actions
Dropbox	<input checked="" type="checkbox"/>	
Wunderlist	<input checked="" type="checkbox"/>	
Asana	<input checked="" type="checkbox"/>	

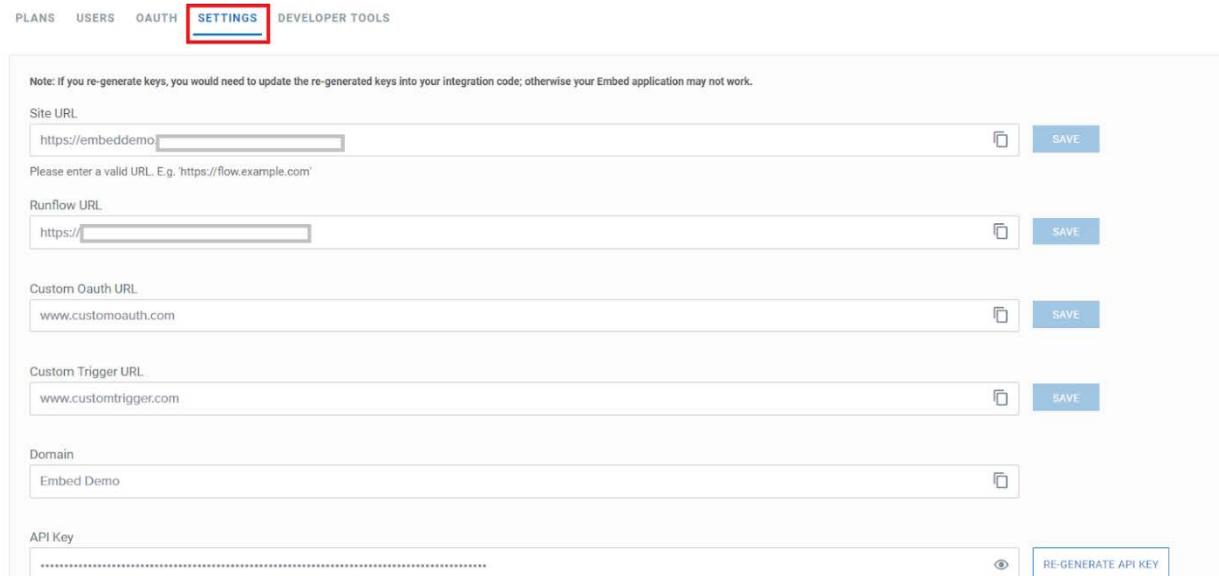
1 - 3 of 3 1

To view an existing OAuth, click 'View'. To delete an existing OAuth, click 'Delete' listed under 'Actions'.

You will be prompted to confirm the delete action. When you click 'Delete', the OAuth will be deleted from your website/application.

3.5.1.4 Settings

This option lets you configure important settings of your partner integration account. Here you can find the API key and verification tokens that are used to communicate with the webMethods.io Embed server. To do so, navigate to 'Embed Admin Portal > Embed > Embed Settings > Settings'.



Site URL: Site URL of your webMethods.io Embed application.

Runflow URL: Runflow URL associated with your application/website.

Custom OAuth URL: Custom OAuth URL associated with your application/website.

Custom Trigger URL: Custom Trigger URL associated with your application/website.

Domain: Enter the domain name of your Embed application.

API Key: Copy the API key to be used inside the login function of the SDK. Click on 'Regenerate API Key' to regenerate the API key.

Source Verification Token: Copy the Source Verification Token to be used inside the init function of the SDK to verify the source. Click 'Re-generate Source Token' to regenerate the source verification token.

Master Token: Copy the master token to be used inside the init function of the SDK. Click 'Re-generate Master Token' to regenerate the master token.

Identifier: Copy the unique identifier to be used inside the init function of the SDK.

3.5.1.5 Developer Tools

You can add custom CSS to your Embed application website and download the code for Embed demo site to get started with custom site development quickly. To do so, navigate to 'Embed Admin Portal > Embed > Embed Settings > DEVELOPER TOOLS'.

PLANS USERS OAUTH SETTINGS **DEVELOPER TOOLS**

Custom CSS

```
.cui-top-bar { background-color:#333; }
```

ADD

SDK URL

```
aws-us.webmethods.io/2.0.14/sdk/js/embed-sdk.js
```

Download Code for Demo Site

```
aws-us.webmethods.io/2.0.14/sdk/demo_site.zip
```

DOWNLOAD

Custom CSS: Enter the custom CSS code in the given block and click 'Add'. This will automatically apply the specified CSS onto your Embed application website.

SDK URL: Copy the SDK URL for the demo site.

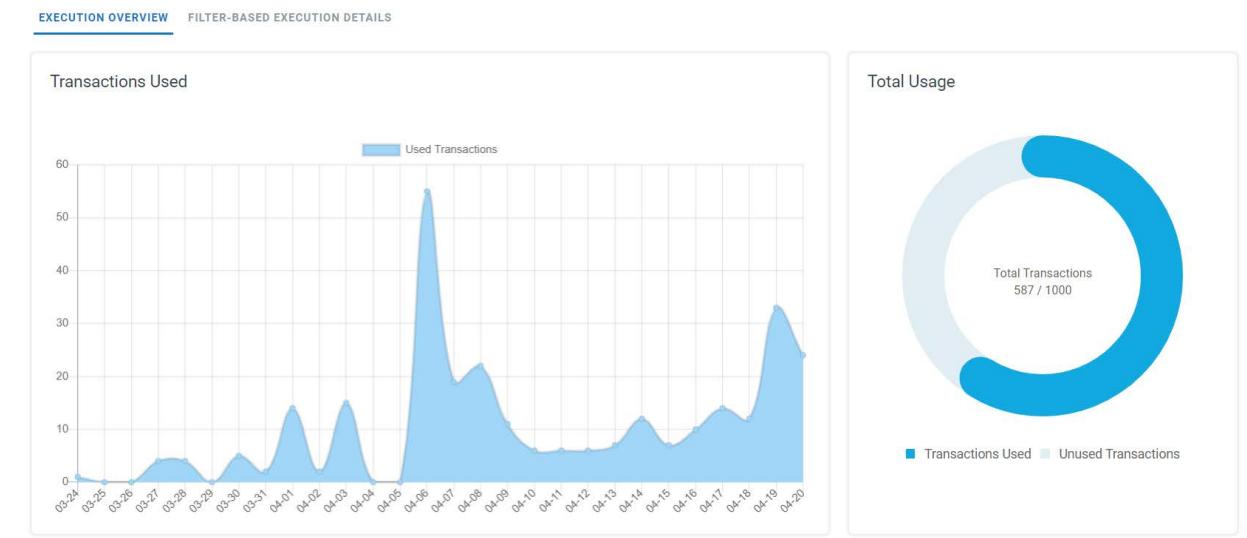
Download Code for Demo Site: Download the Embed demo site code which you can further modify to build your custom site quickly.

3.5.2 Metrics

The 'Metrics' option lets you view the usage statistics of your Embed enabled application/website. To view the metrics, navigate to 'Embed Admin Portal > Embed > Metrics'. Here, you will see you tabs:

- EXECUTION OVERVIEW
- FILTER-BASED EXECUTION DETAILS

Let's know more about these tabs in detail.

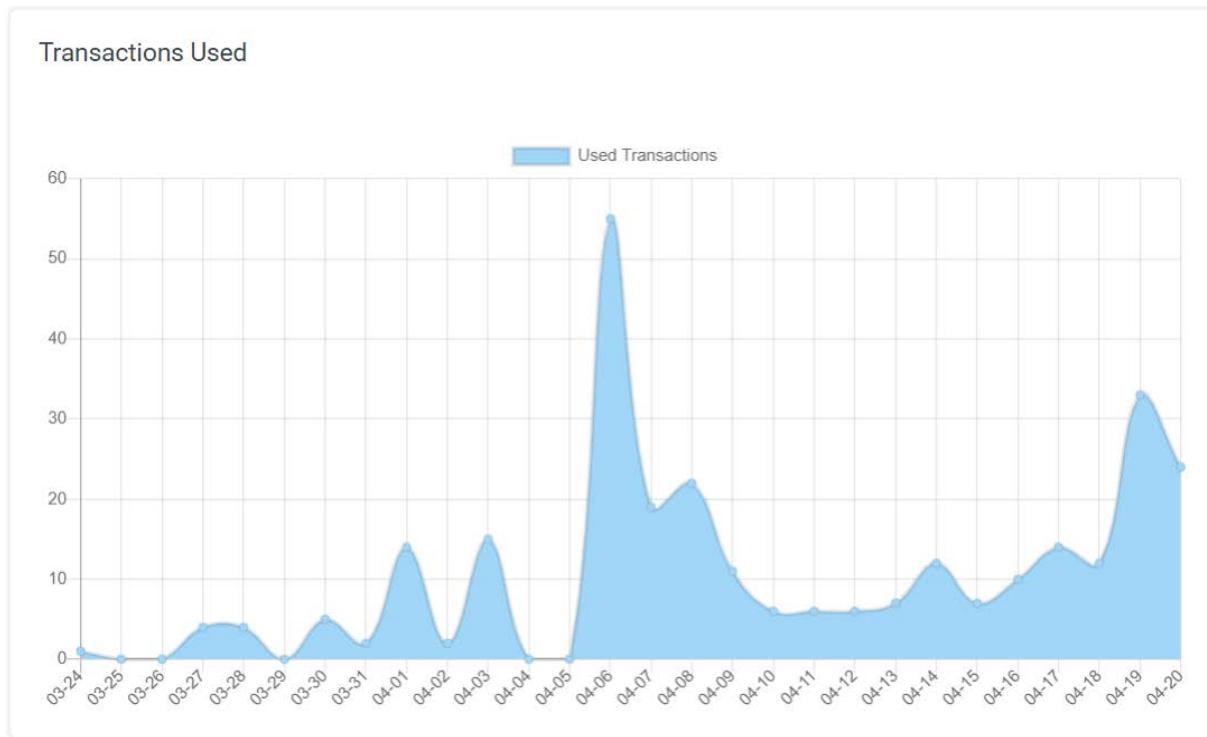


3.5.2.1 Execution Overview

This section gives you an overview of the execution and transaction usage statistics for your Embed admin portal.

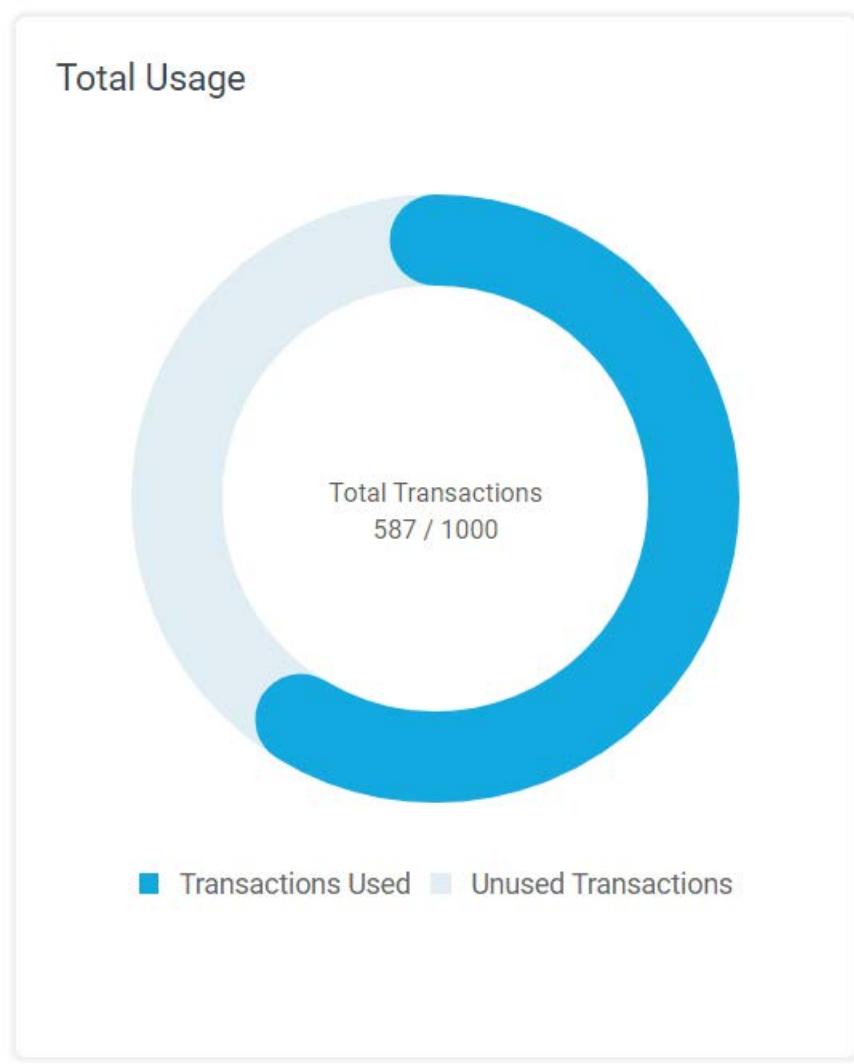
Transaction Used

This section gives the graphical information of the total number of transactions used by your Embed Admin account over a period of time (in days).



Total Usage

This section shows the total number of transactions used out of the allocated monthly transactions.



Top Active Integrations

This section gives you the list of integrations that consumed most transactions.

Top Active Integrations

Integrations with most used Transactions.

New item added in Wunderlist send message on Spark	171
Salesforce	42

Top Active Groups

This section gives you the list of groups that consumed most transactions.

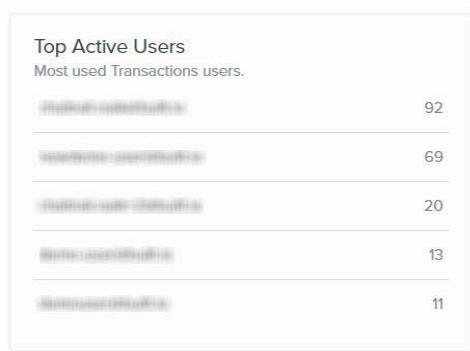
Top Active Groups

Groups with most used Transactions.

Group Plan A	0
Plan 02	4

Top Active Users

This section gives you the list of email IDs associated with the users who consumed most transactions.



3.5.2.2 Filter-based Execution Details

You can alternatively view the execution statistics associated with specific plans, solutions, and users associated with your Embed Admin account. To do so, navigate to 'Embed Admin portal > Embed > Metrics > FILTER-BASED EXECUTION DETAILS' page.

The screenshot shows the 'FILTER-BASED EXECUTION DETAILS' page. At the top, there is a date range selector with the text "03/08/2020 3:04 PM - 04/08/2020 3:04 PM" and a calendar icon. To the right is a blue "ADD FILTER" button. Below the date range, the text "No Filter Added" is displayed. At the bottom, there is a section titled "Execution Graph" with the text "No Graph Data".

Setting Custom Time Frame

You can specify a custom time frame (up to one month) to fetch the execution details associated with it. To do so, click on the date picker icon and set the required time frame.

The screenshot shows the 'FILTER-BASED EXECUTION DETAILS' tab selected. At the top, there is a date range selector from '02/03/2020 3:04 PM' to '03/20/2020 3:04 PM'. Below it is a calendar for March 2020. A red box highlights the 'X' and 'Edit' icons at the top right of the calendar. To the right of the calendar, a blue button labeled 'ADD FILTER' is visible. Below the calendar, the text 'No Filter Added' is displayed. To the right of the calendar, there is a section titled 'Execution Graph' which contains the message 'No Graph Data'.

Adding Filters

You can add filters to fetch the execution logs associated with specific plans, solutions, and users. To do so, click on the Add Filter button. A new filter field will appear in the window.

The screenshot shows the 'FILTER-BASED EXECUTION DETAILS' tab selected. At the top, there is a date range selector from '02/03/2020 3:04 PM' to '03/20/2020 3:04 PM'. Below it is a 'Filter - 1' dialog box. A red box highlights the 'ADD FILTER' button. The dialog box contains three fields: 'Parameter*', 'Condition*', and 'Value*'. Each field has a dropdown menu with the placeholder 'Please Select'.

- Parameter:** Select the parameter (Plans/Solutions/Users) on which you want to apply the filter. You can apply one filter for each parameter by clicking the 'ADD FILTER' button.
- Condition:** Select the relevant conditional operator (= or !=).
- Value:** Based on the selected parameter, you will see the list of plans/solutions/users along with selectable checkboxes in the drop down list. Select the relevant checkboxes for items on which you want to apply the filter.

Note: Multiple filters will work like AND operation, meaning, the execution graph will show the result based on all the added filters.

EXECUTION OVERVIEW **FILTER-BASED EXECUTION DETAILS**

03/08/2020 4:16 PM ~ 04/08/2020 4:16 PM X Calendar

APPLY FILTER ADD FILTER

Filter - 1

Parameter *	Condition *	Value *
Plans	=	1 Selected

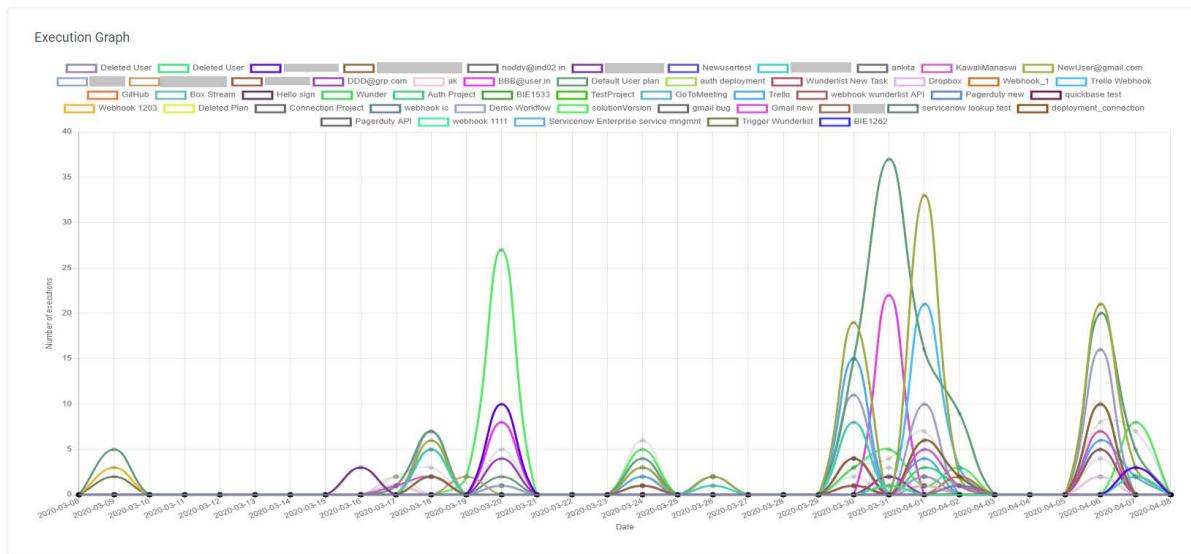
Filter - 2

Parameter *	Condition *	Value *
Solutions	!=	1 Selected

Filter - 3

Parameter *	Condition *	Value *
Users	!=	1 Selected

Once this is done, click on the APPLY FILTER button. You will see the execution graph for the selected filters.



3.5.3 Alerts

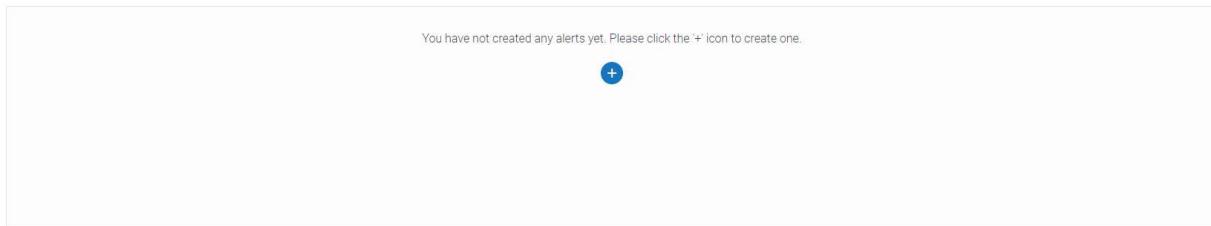
You can enable alerts to receive notifications whenever your total allocated tenant transactions are close to being exhausted/already exhausted. These alerts are sent for the following scenarios:

- When the tenant consumes 80% of their total allocated transactions
- When the tenant consumes 100% of their total allocated transactions
- When the tenant consumes 120% of their total allocated transactions

- When the tenant consumes 140% of their total allocated transactions
- When the tenant consumes 160% of their total allocated transactions
- When the tenant consumes 180% of their total allocated transactions

Note: Your tenant executions will not be stopped till your tenant consumes 180% of its allocated transitions. Any overage usage will be charged separately for your tenant. After 180% of allocated transaction consumption however, all your tenant executions will be stopped.

To enable alerts for your tenant, navigate to 'Embed Admin portal > Embed > Alerts' page.



Click on the 'Plus' button to add email IDs. You will see the following screen.

USAGE ALERTS

Note: Usage alert notification emails will be sent to the email IDs entered in the below field.

Enable usage alerts

Send Email To
Add email

SAVE

- **Enable usage alerts:** Select the checkbox to enable usage alert emails for your Embed Admin account.
- **Send Email To:** Enter the list of email IDs on which you want the alert notifications to be sent.

Once this is done, click SAVE.

You can add/remove email addresses in the alert list any time in the future. You can alternatively delete the alert or disable alert for your tenant.

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