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Freedom as a Service

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.

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2 Get Started with webMethods.io Embed

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

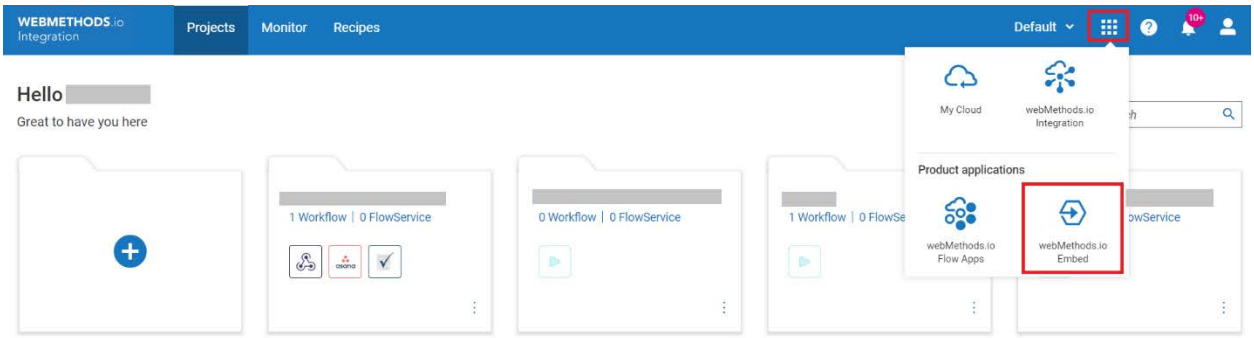
2.1 Set up webMethods.io Embed tenant

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.

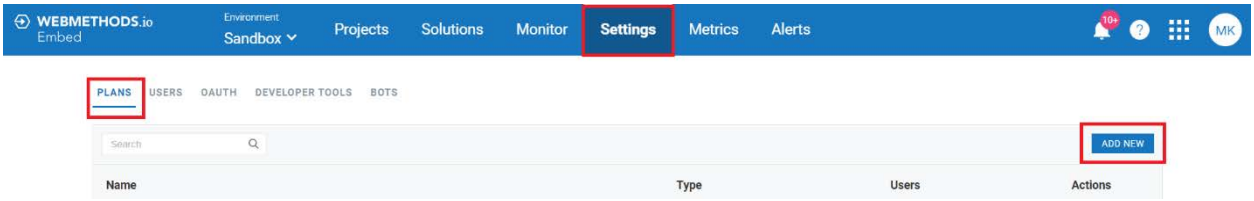


When you click on it, you will be redirected to the webMethods.io Embed admin portal. From here, you can configure the settings to integrate webMethods.io Embed with your application.

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 'Settings > PLANS' and click on 'ADD NEW'.



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

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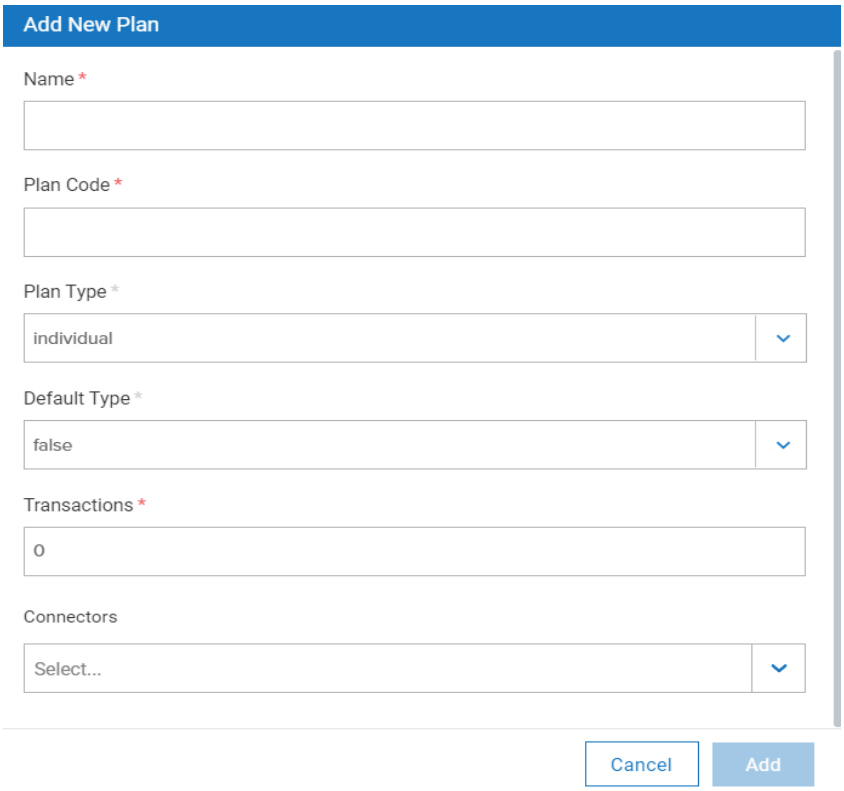

Name: Provide a name for the default plan.

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 modify it as per your requirements or create your custom application site from scratch.

To download the demo site code, navigate to 'Settings > DEVELOPER TOOLS' and scroll down to the bottom of the page.

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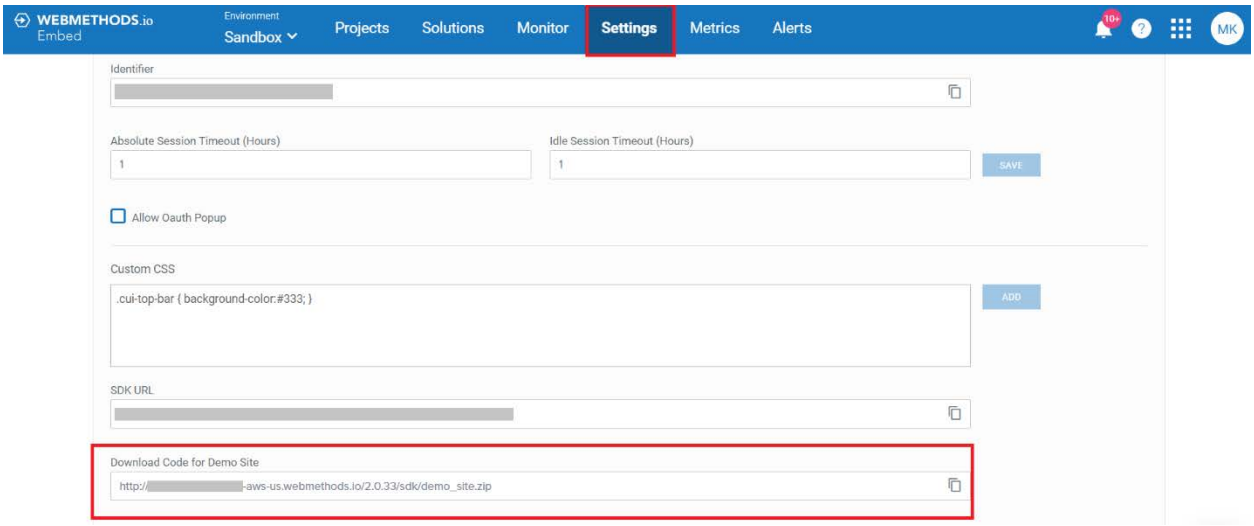

Copy the link given in the **Download Code for Demo Site** Field, paste it in a new browser tab, and press enter. The demo site code will get downloaded on your machine.

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.

```
var d = localStorage.getItem('awt');
if(href != null && false){
    window.Embed.login(d).then(()=>{ window.localStorage.removeItem('path'); window.location = href; },(err)=>{
        console.log(err)
    });
}
else{
    window.Embed.login(d).then(()=>{ window.localStorage.removeItem('path'); window.location = '/';},(err)=>{
        console.log(err)
    });
}
)

function init(){

    window.Embed = FlowEmbed.init(
        "<Identifier>", // Add Identifier key present inside the embed settings tab of your embed portal
        "<Source Verification Token>", // Add Source Verification Token key present inside the embed settings tab of your embed portal
        "<Master Token>", // Add Master Token key present inside the embed settings tab of your embed portal
        "sandbox",
        "v2",
        null,
        false
        );

window.Embed.on('logout',function(){
    logoutUser();
})
}

function logoutUser(){
    localStorage.removeItem('awt');
    localStorage.removeItem('synergy');
    localStorage.removeItem('path');
    localStorage.removeItem('user')
    localStorage.removeItem('username');
    window.location = '/';
}
```

Now, switch to your webMethods.io Embed Admin portal, navigate to 'Settings > DEVELOPER TOOLS' and locate the following fields:

- Source Verification Token

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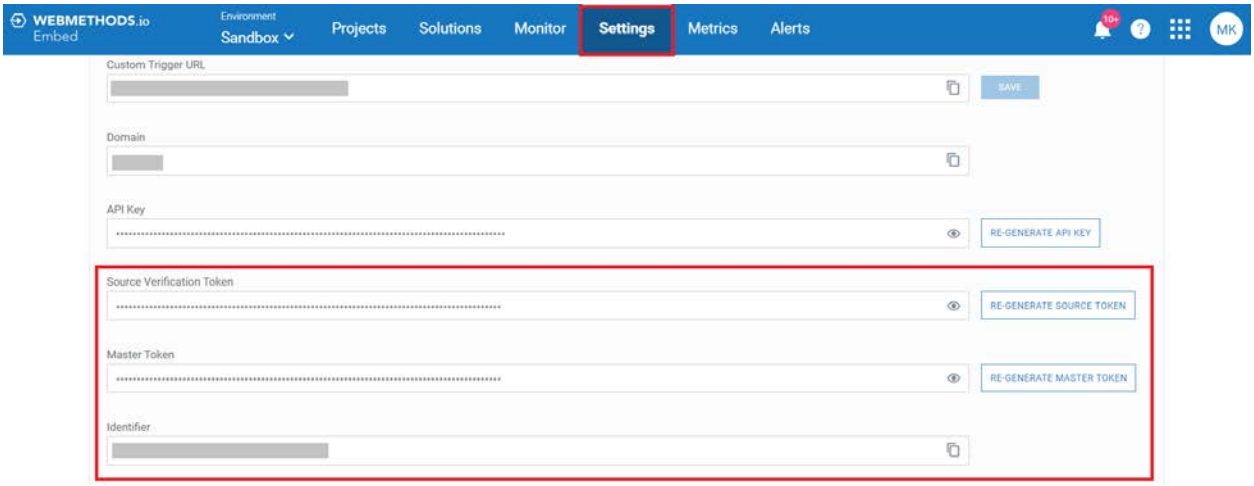
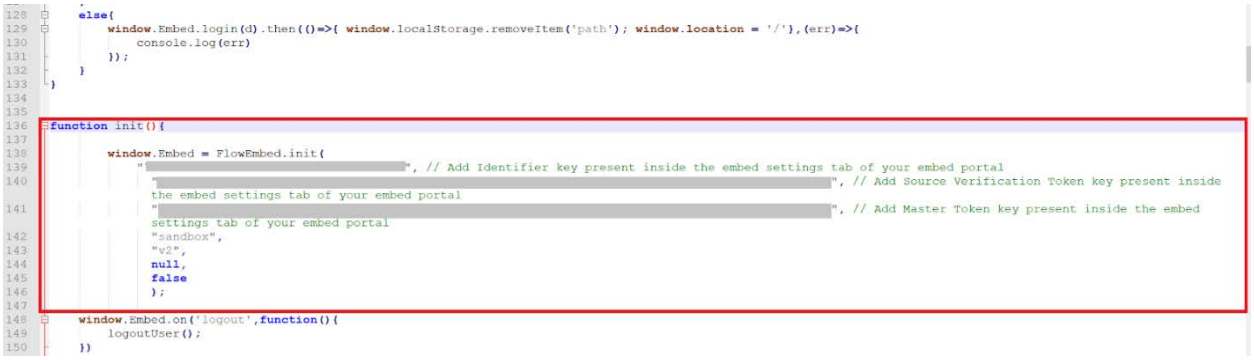
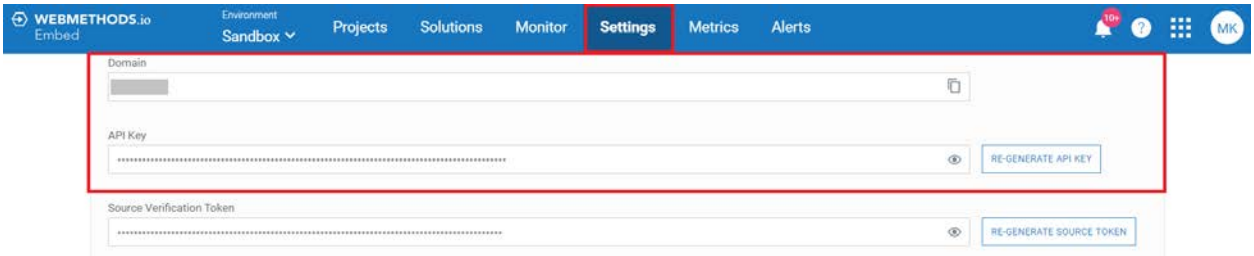
- Master Token
- Identifier



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



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.



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```
const express = require('express');
const path = require('path');
const fs = require('fs');
var token = process.env.API_KEY || "                                                                    " // Add API Key present inside
the embed settings tab of your embed portal
let app = express();
var bodyParser = require('body-parser'),
    jwt = require('jsonwebtoken'),
    basicAuth = require('express-basic-auth');

app.use(basicAuth({
    users: { '<USER_NAME>': '<PASSWORD>'}, // Add basic auth
    challenge: true,
    realm: '<RANDOM STRING>'
}));

app.use(bodyParser.urlencoded({ extended: true }));

app.get('/hello', (req, res) => res.send('Hello World!'));
app.use('/assets', express.static(path.join(__dirname ,'public','dist')));
app.use('/', express.static(path.join(__dirname ,'public')));
app.get('/services', (req,res) => res.sendFile(path.join(__dirname ,'public', 'partials', 'all-services.html')));
app.use('/integrations/:id/:uid/edit/:provider', (req,res)=>{
  return res.sendFile(path.join(__dirname ,'public', 'partials', 'edit-integration.html'));
})
app.use('/integrations/:id/:uid', (req, res) => res.sendFile(path.join(__dirname ,'public', 'partials', 'add-integration.html')));
app.get('/integrations/:id', (req,res) => res.sendFile(path.join(__dirname ,'public', 'partials', 'integrations-list.html')));
app.use('/my-integrations', (req, res) => res.sendFile(path.join(__dirname ,'public', 'partials', 'my-integrations.html')));

app.get('/execution-logs', (req,res) => res.sendFile(path.join(__dirname ,'public', 'partials', 'execution-logs.html')));
app.get('/login', (req, res) => res.sendFile(path.join(__dirname ,'public', 'partials', 'login.html')));
app.get('/postlogin', (req,res) => res.sendFile(path.join(__dirname ,'public', 'partials', 'post-login.html')))

app.post('/submit', (req, res) => {
  console.log(req.body);
    if(req.body.email && req.body.password && req.body.password == "<PASSWORD>" ){ // Add password for your demo site login
      const user = {
        email     : req.body.email,
        domain    : '        ', // Add Domain key present inside the embed settings tab of your embed portal
        plan      : '',
        account   : '',
      }
```

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.

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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.

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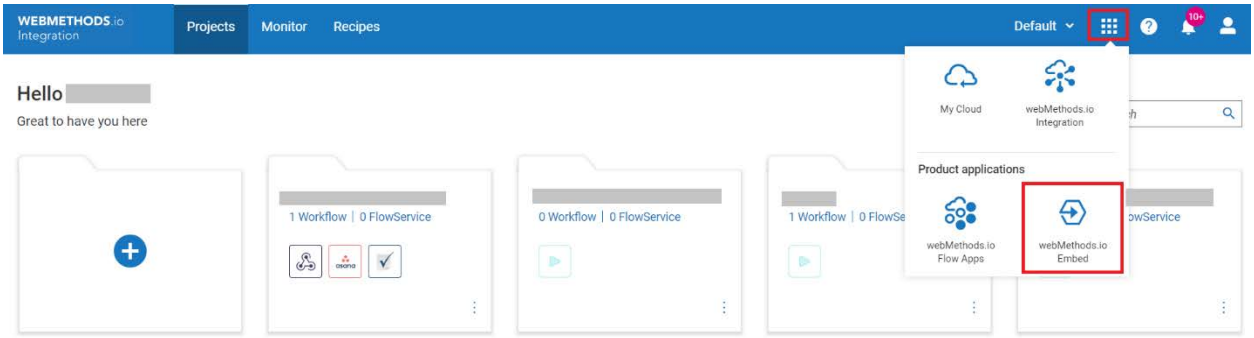
3 Understanding webMethods.io Embed Admin Portal

The webMethods.io Embed Admin portal allows you to integrate with your website/application. To access the webMethods.io 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 webMethods.io Embed Admin dashboard.

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

1. **Environment:** Set environment for webMethods.io Embed Admin
2. **Projects:** Create new projects and solutions
3. **Solutions:** Manage existing solutions
4. **Monitor:** Track tenant activities and view audit logs
5. **Settings:** Configure webMethods.io Embed Admin portal settings
6. **Metrics:** View app usage information
7. **Alerts:** Configure usage alert settings

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.

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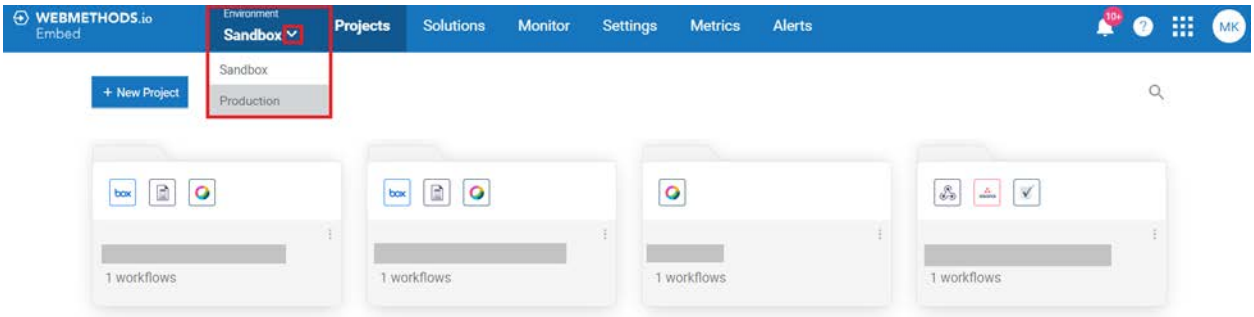


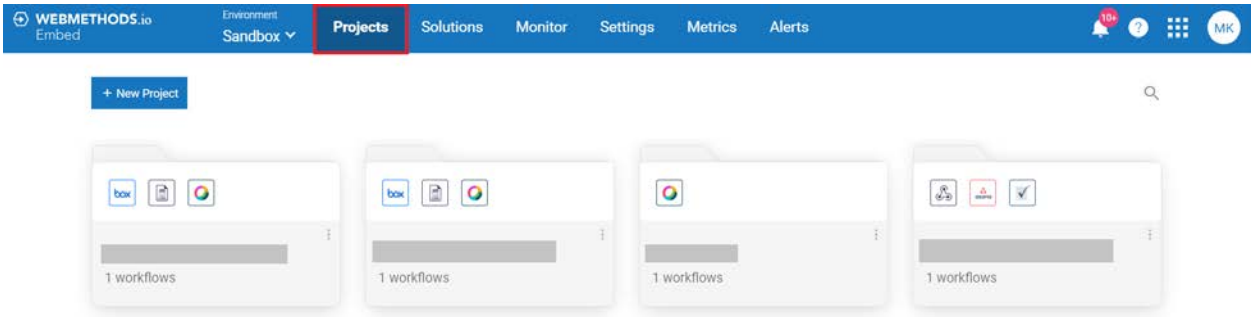
- Sandbox: Used to test your Embed Admin configurations
- Production: Used to manage Embed Admin settings for the live site

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.

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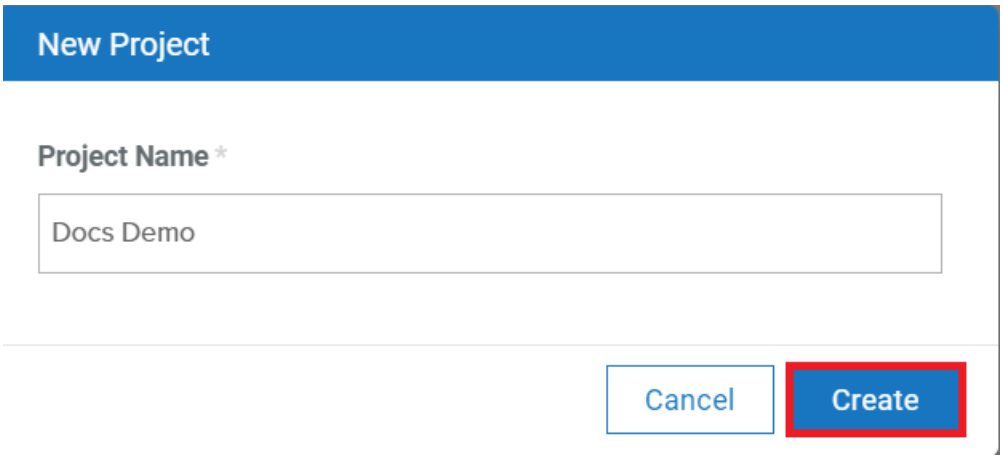
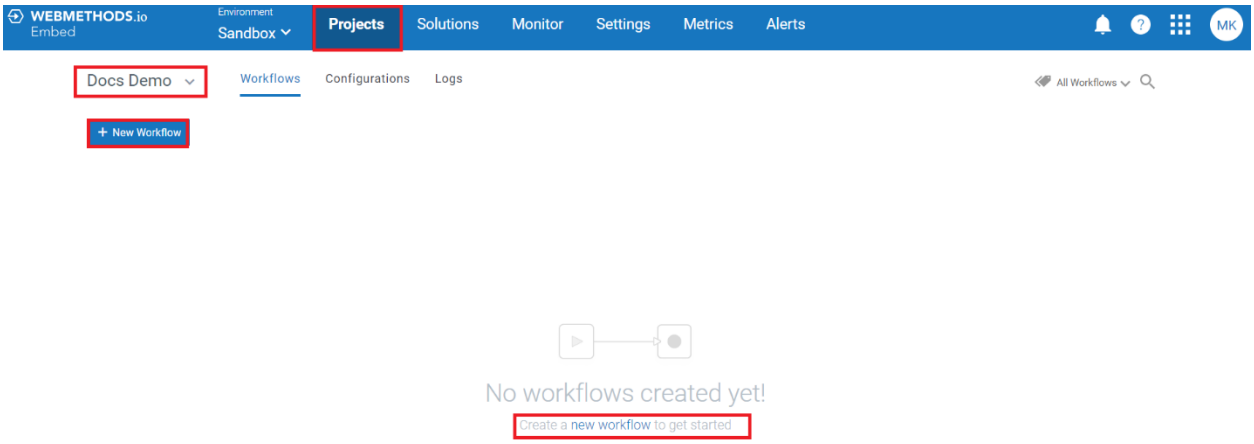


Once you have entered the Project Name, click ‘Create’. This will create a new project in your webMethods.io Embed Admin account.



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 webMethods.io Embed Admin and 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 in the top-right corner. From the list of options that appear, click on the ‘Create Solution’ option.

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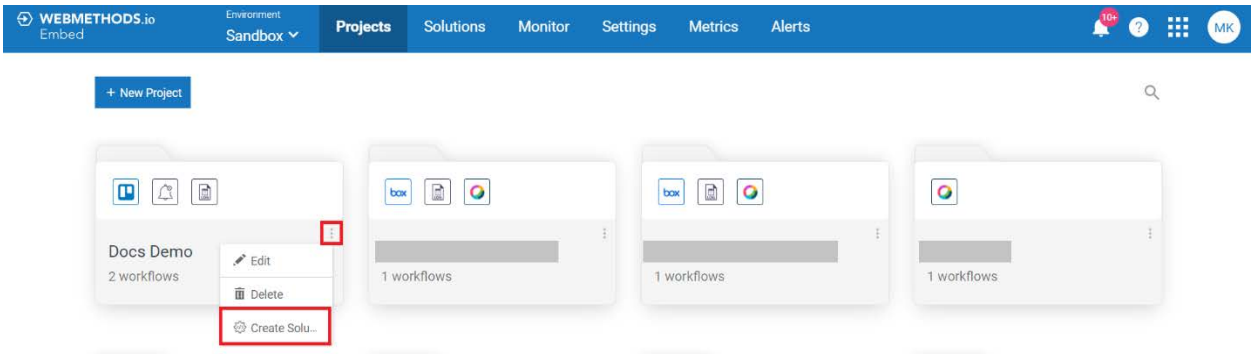
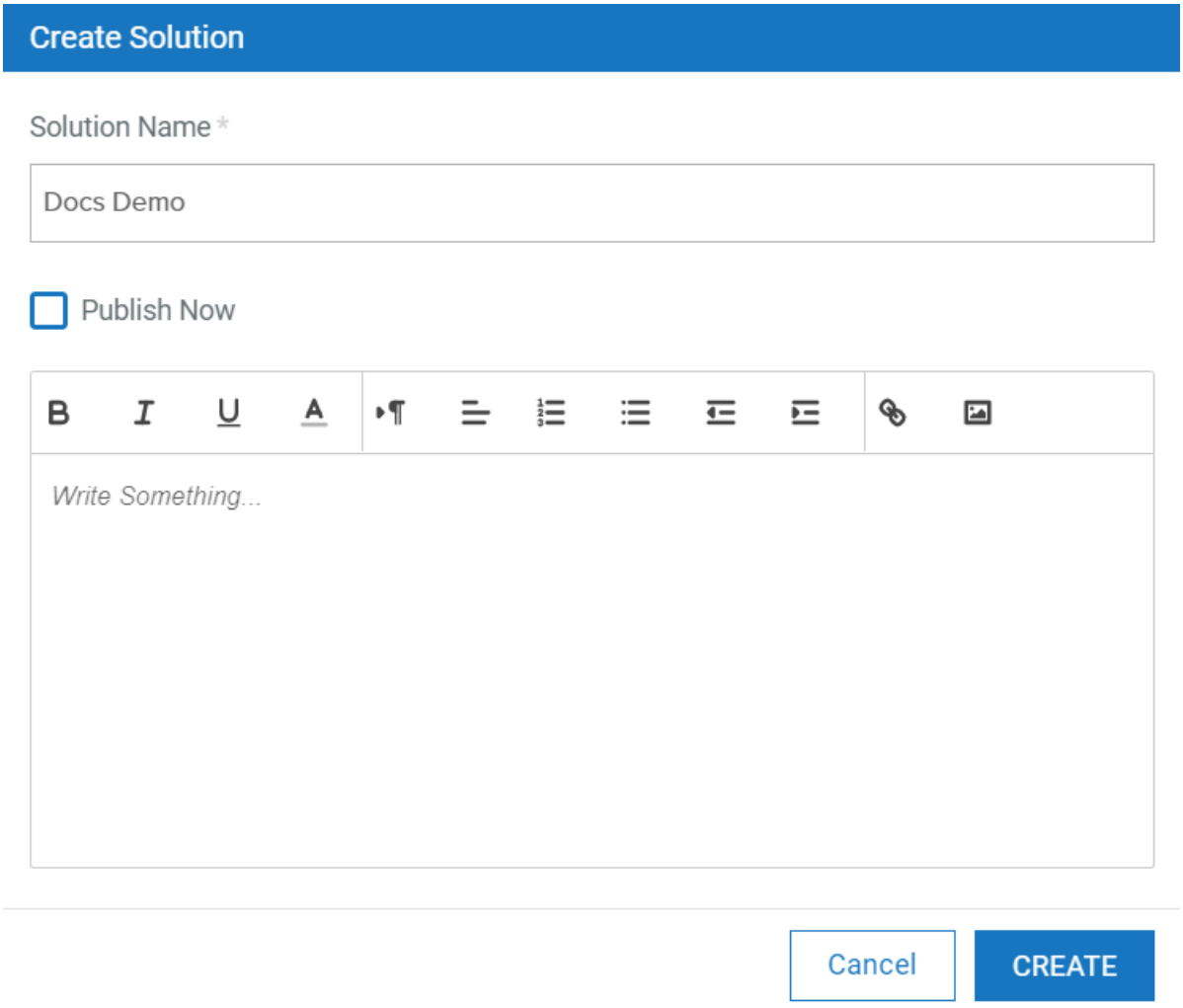


A ‘Create Solution’ dialogue box will appear on screen.



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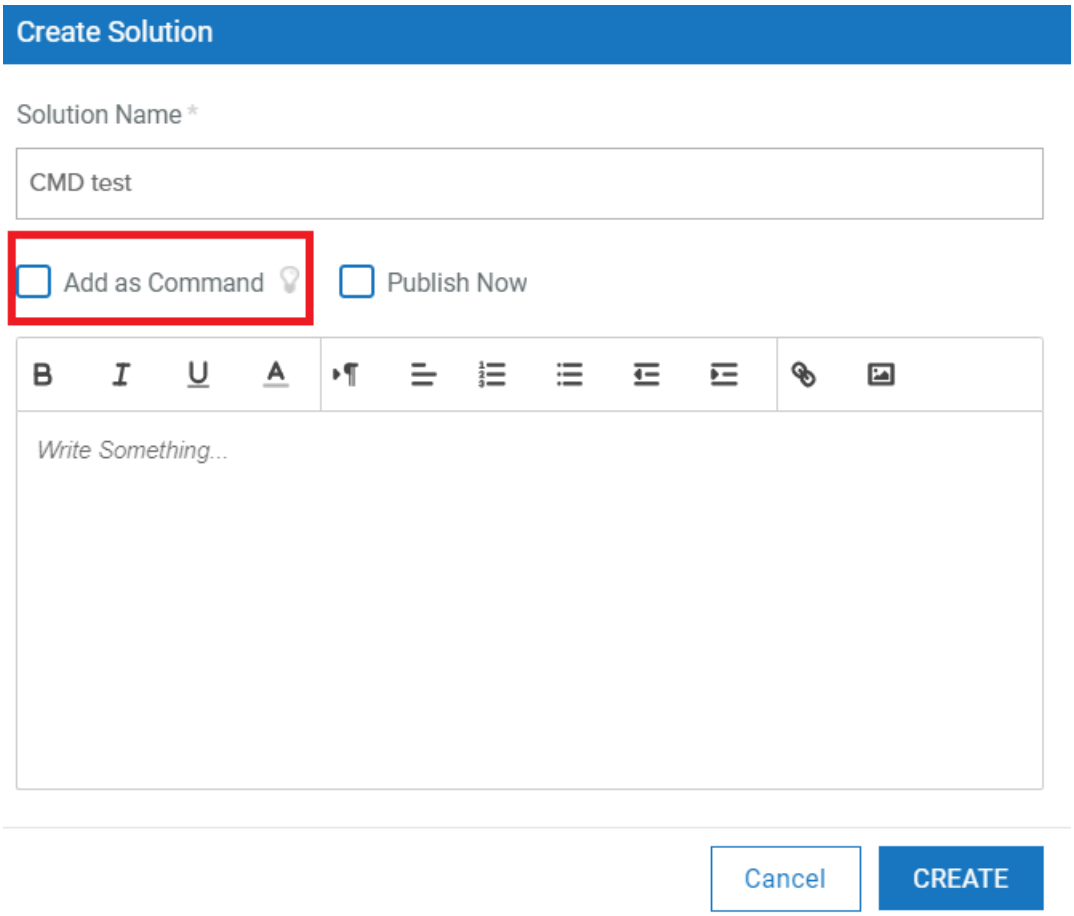
If your project runs on **webhook**, you will see an additional checkbox field 'Add as Command' in the 'Create Solution' window.

Commands are webhook-enabled workflows which are used to create interactive bots.



Solution Name: Provide a suitable name for the solution.

Add as Command: Select this checkbox if you want to add this solution as a command.

Publish Now: Select this checkbox if you want to automatically publish the solution (or command) to Sandbox environment after creation.

If you select this checkbox, you will need to provide input for the following field:

- **Select Bot(s) to which this solution should be added:** Select the bot(s) to which you want to add this solution

Description: Provide a short description for the bot.

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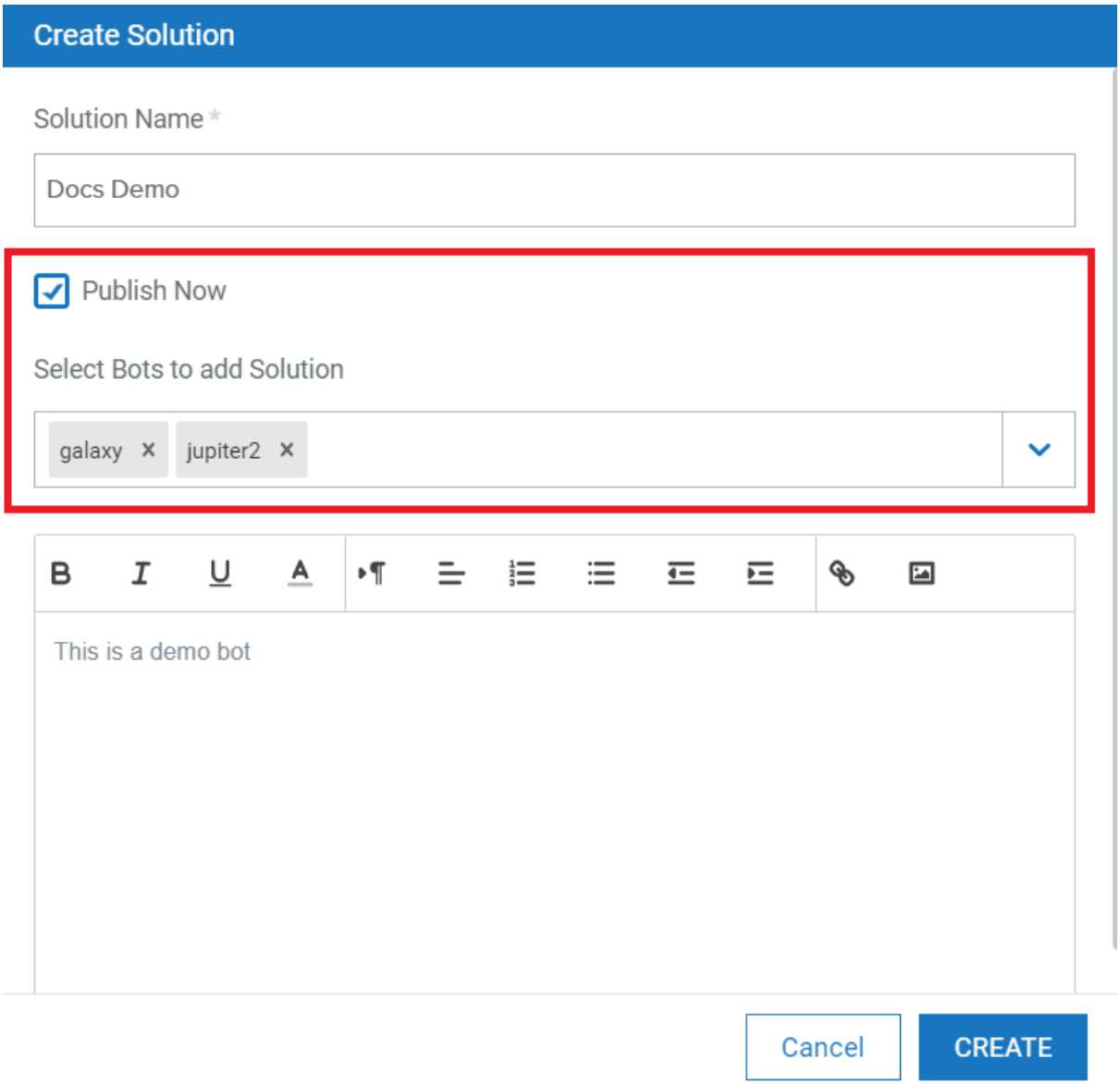

Once this is done, click CREATE. Based on the inputs provided, this will either create a solution/command or create and publish the solution/command.

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.

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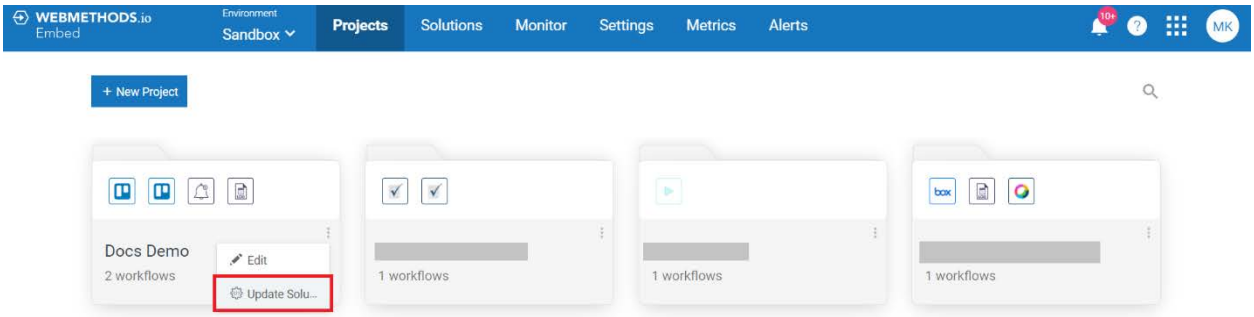
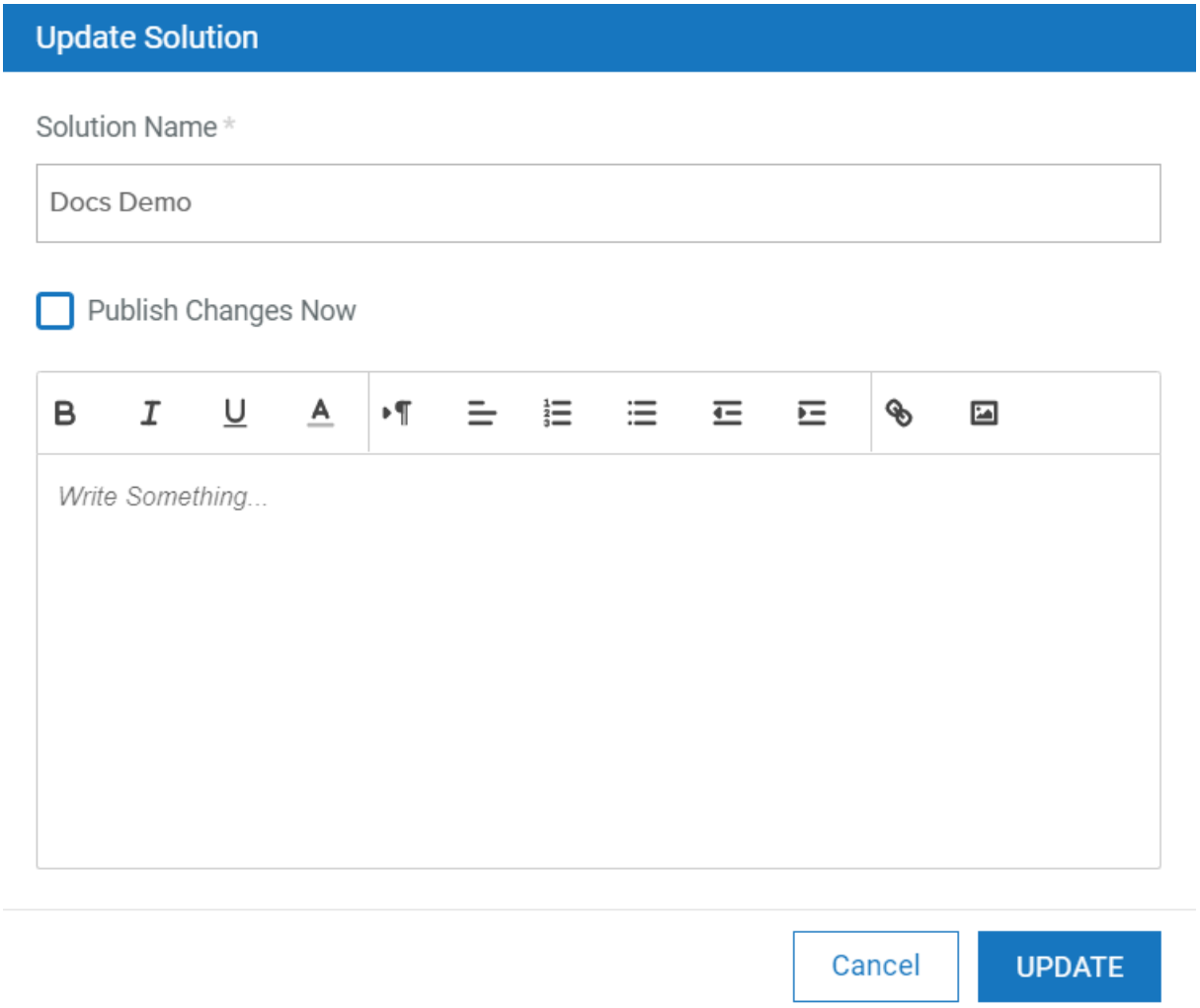


A new dialogue box appears where you can make relevant updates to your solution.



Once you have entered the details, click on ‘Update’ to update the solution details.

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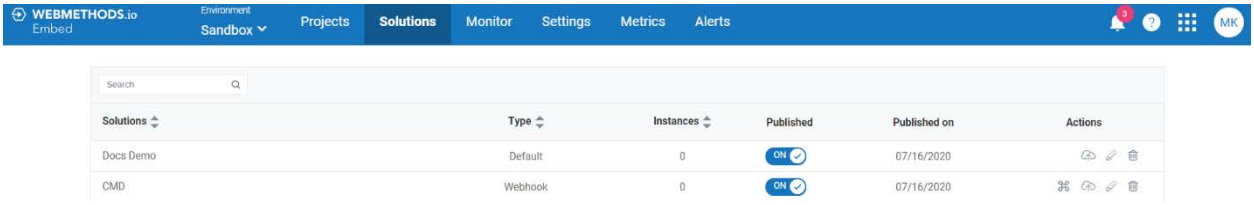
3.3 Solutions

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



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

- **Solutions:** Name of the solution
- **Type:** Type of the solution (Default/Webhook/Command)
- **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.
    - **Convert Solution to Command:** Convert an existing webhook solution to command. In order to convert a solution to command, the solution must fulfil the following prerequisites:
        - It must run on webhook
        - It shouldn't have been added to any bot
        - It shouldn't be published on production
        - It shouldn't have any user instances

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.

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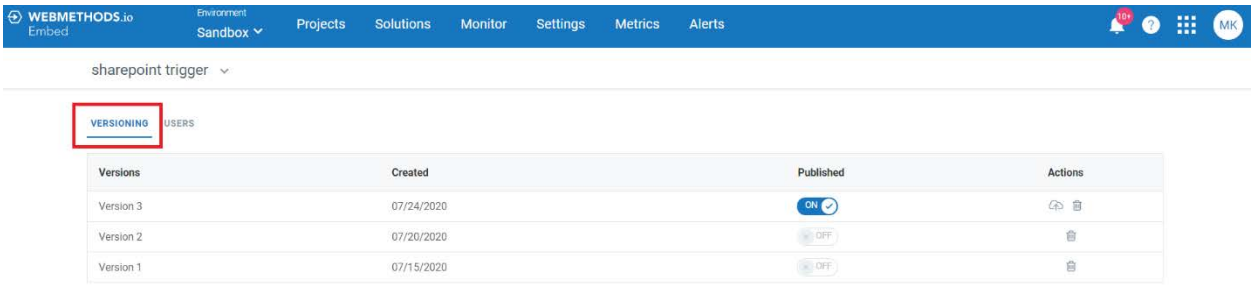

This page contains the following columns:

- **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 delete user instance associated with a solution.

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 user instance associated with the solution.

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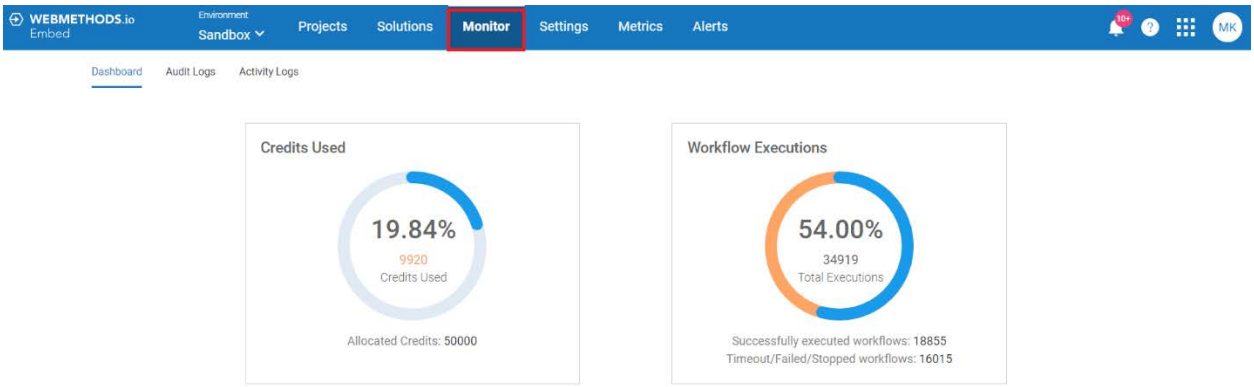
3.4 Monitor

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

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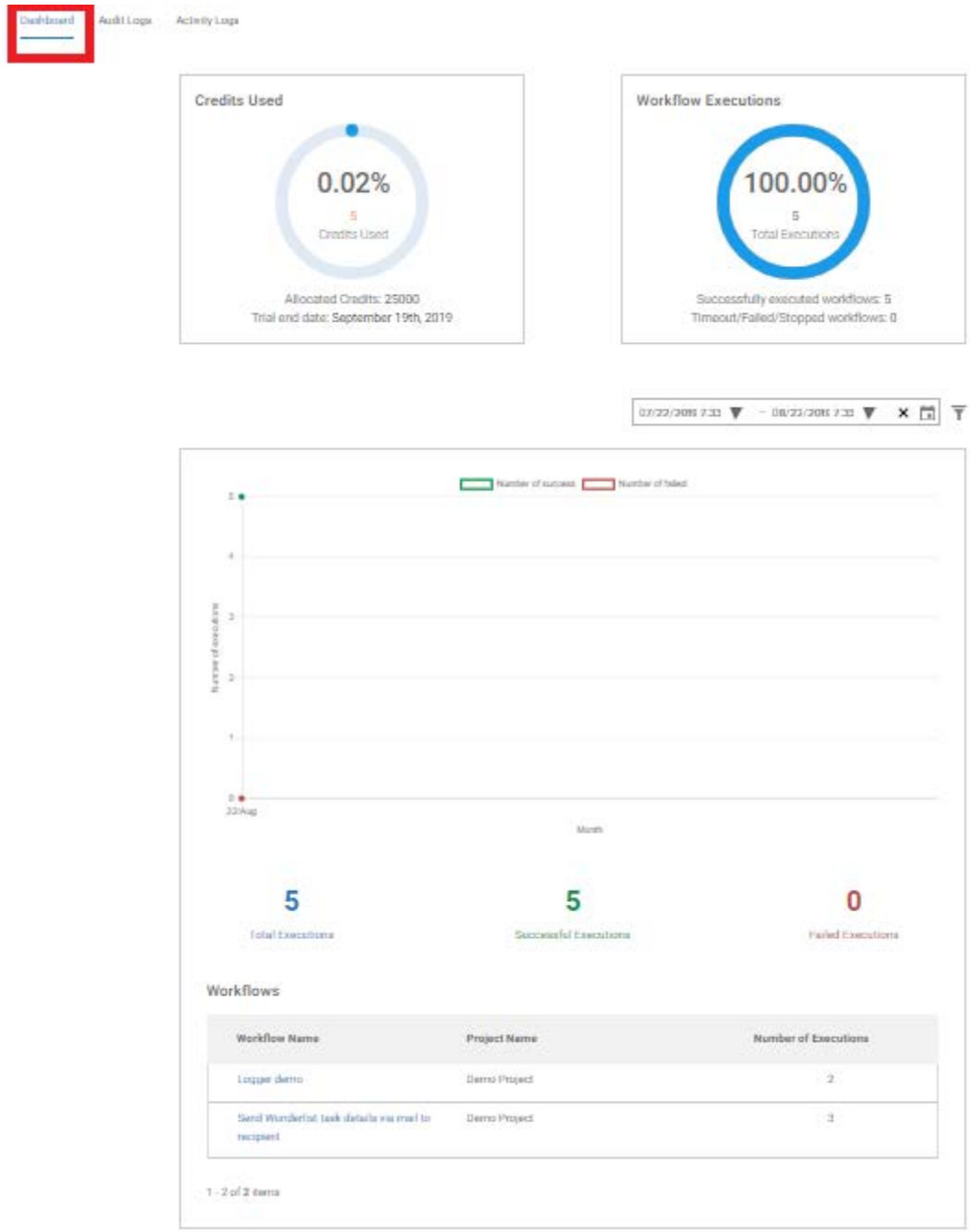

3.4.2 Embed Admin tenant audit logs

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.

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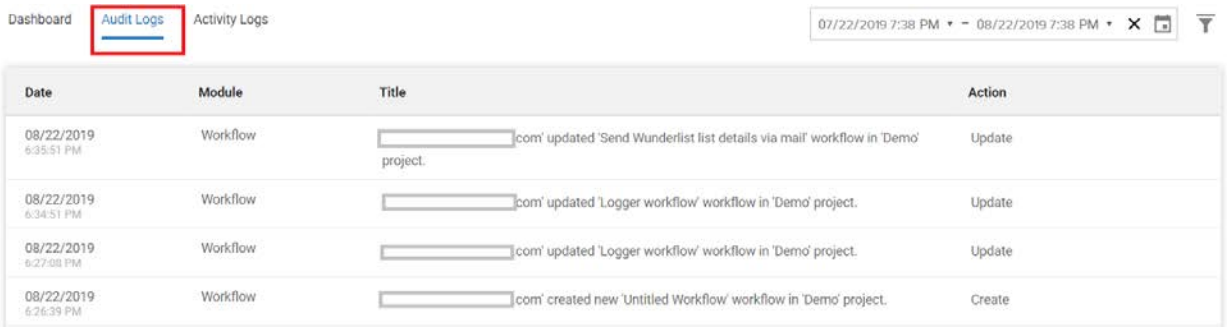
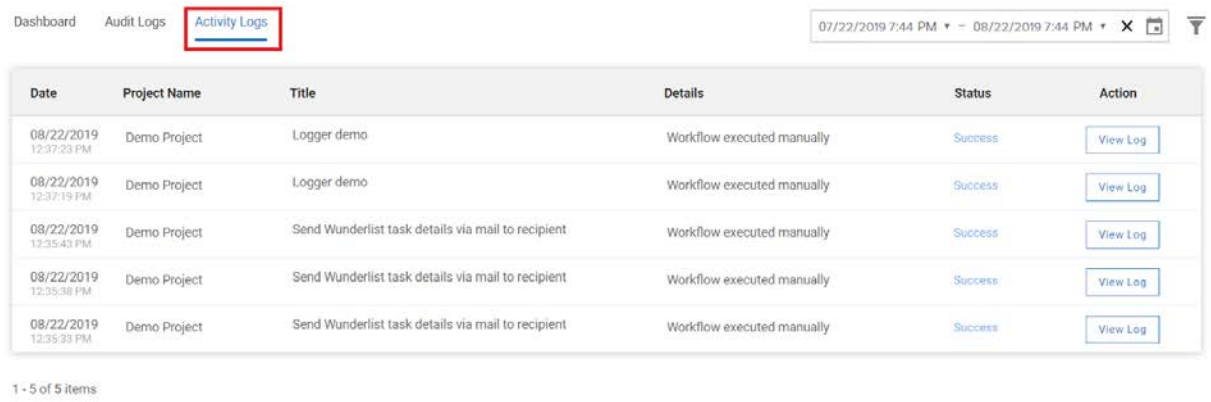


3.4.3 Embed Admin tenant activity logs

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.



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

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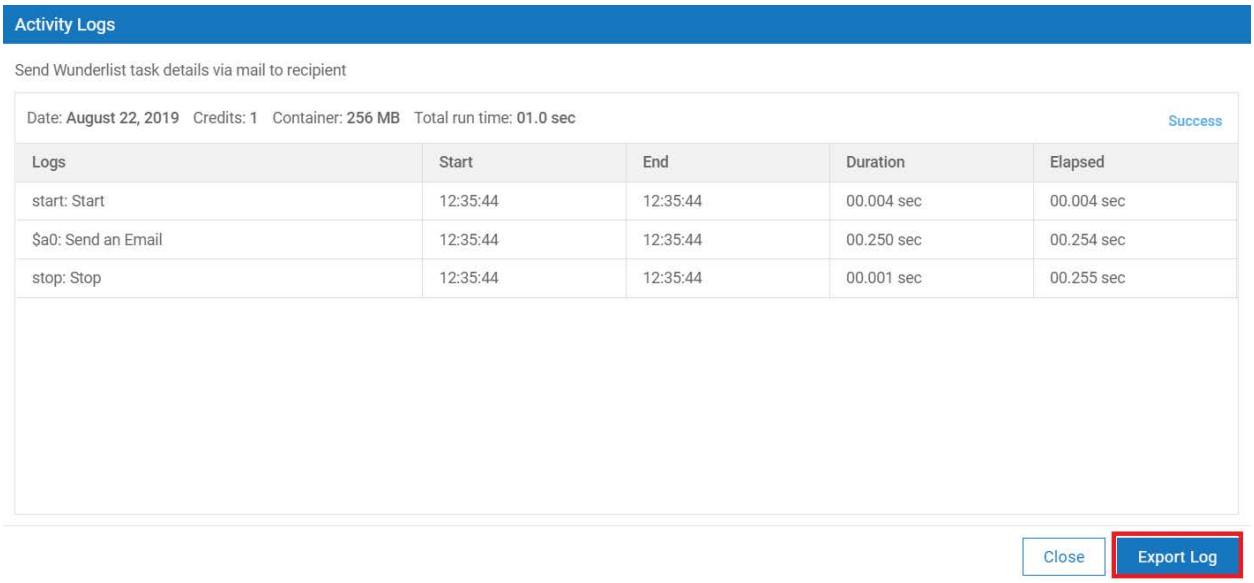
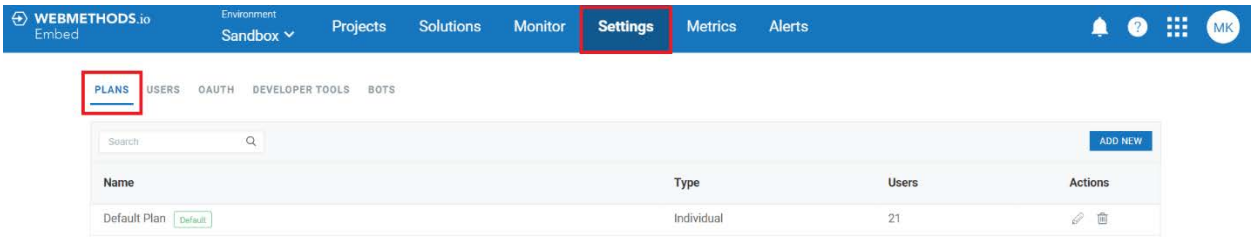


3.5 Settings

The **Settings** menu lets you configure the webMethods.io Embed Admin settings. When you click on the 'Settings' menu, you can see the various configuration options which enable you to create and manage plans, users, connectors, bots, and admin settings for your webMethods.io Embed Admin portal.

Let's look at these options in detail.

3.5.1 Plans



The 'PLANS' tab 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 up to 100 transactions each.

Using 'PLANS' tab, you can create multiple Individual plans.

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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.

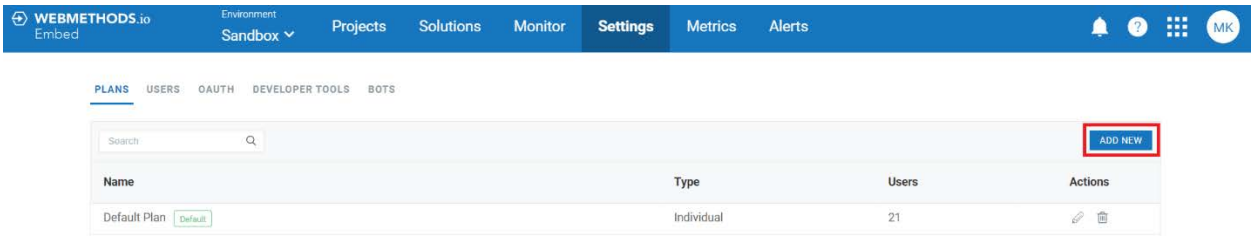
For example, suppose a Group plan, ‘Plan 2’ has a transaction limit of 200. When you assign this plan to 5 users, all of them can jointly execute up to 200 transactions.

Using ‘PLANS’ tab you can create multiple ‘Group’ plans.

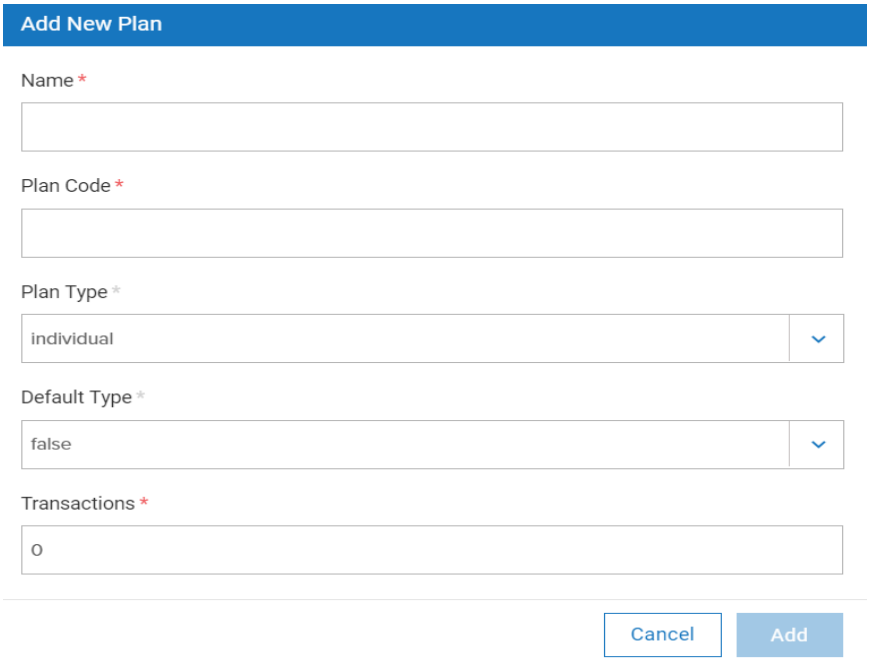
3.5.1.1 Adding new plans

To add a new plan, do the following:

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



A new window will appear.



Name: Provide a unique name for the plan.

Plan Code: Provide a unique ID for the plan.

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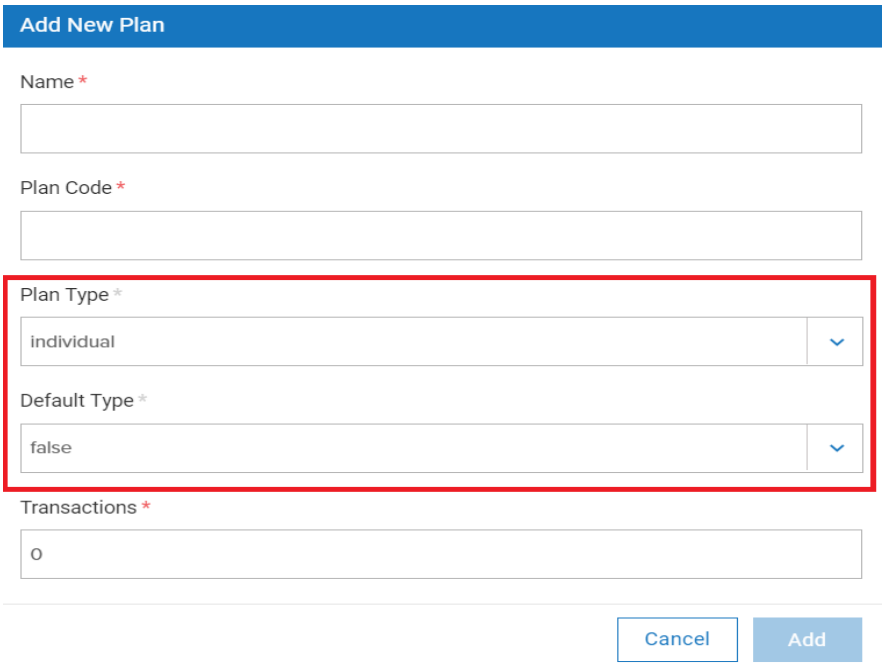
Plan Type: Select the type of plan (‘individual’ or ‘group’) you want to create.

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.

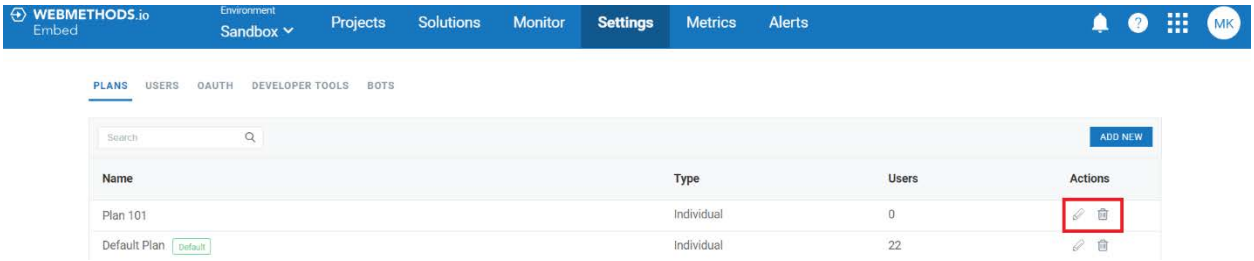
Connectors: Select the connector(s) you want to enable for this plan.



Once you have entered these details, click ‘Add’. This will create the specified plan.

3.5.1.2 Editing or deleting plans

You can also edit or delete an existing plan. To do so, navigate to ‘Settings > PLANS’.



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.

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- **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.

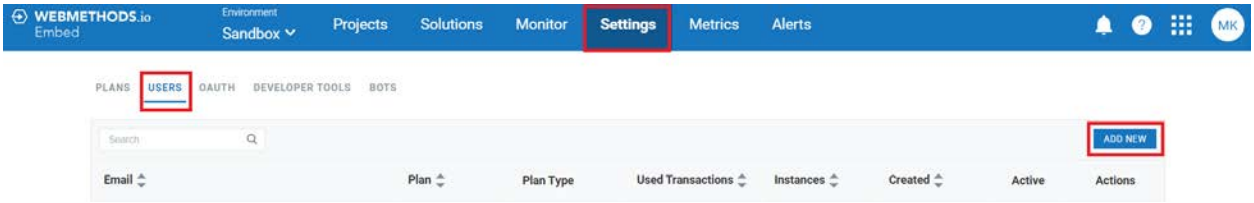
Click on the 'Edit' or 'Delete' options to modify or delete the plan from Embed Admin.

3.5.2 Users

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

3.5.2.1 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:

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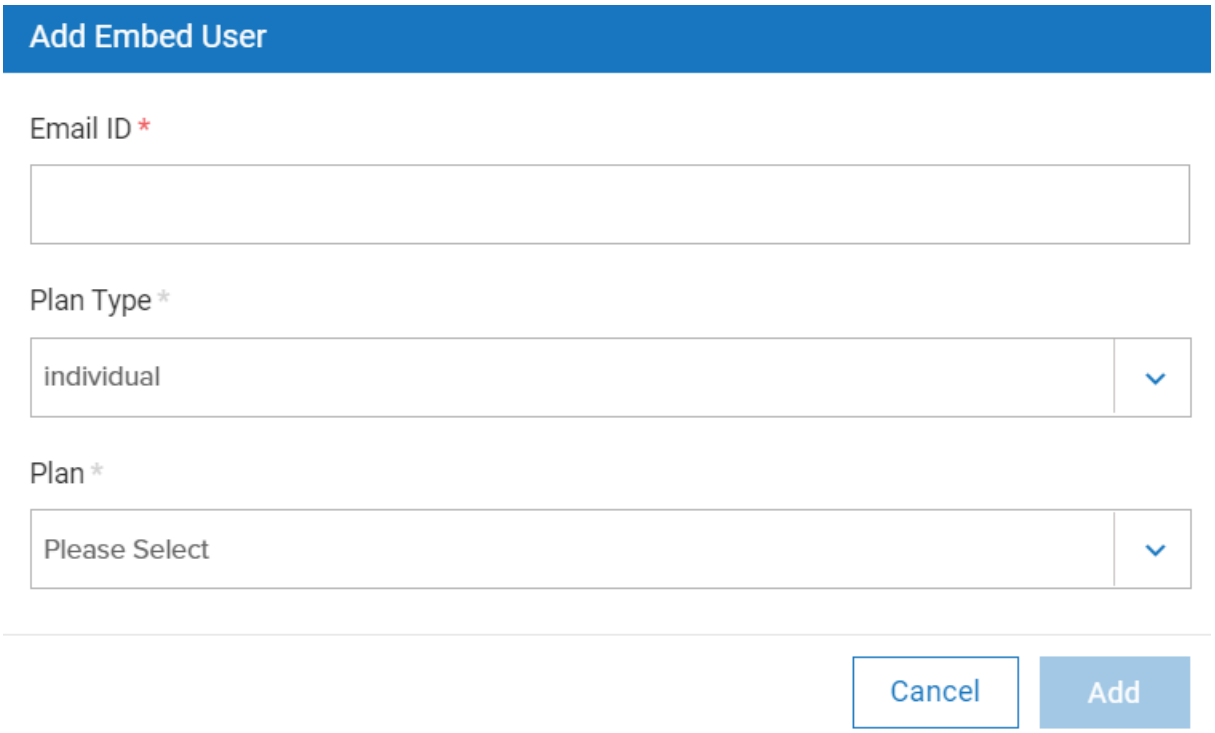
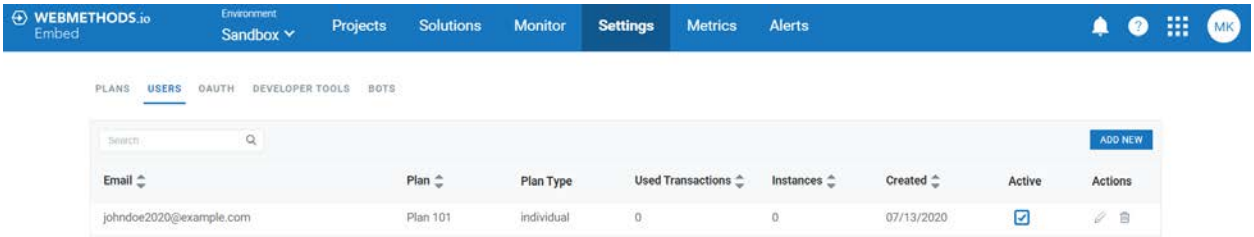


- **Email ID:** Enter the email ID of the user you want to add.
- **Plan Type:** Select the type of plan (individual/group) you want to assign to the user.
- **Plan:** Select the plan you want to assign to the user

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.



- **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.

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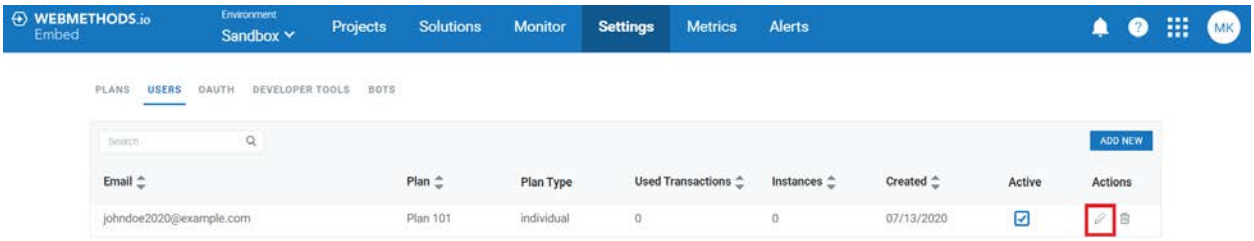
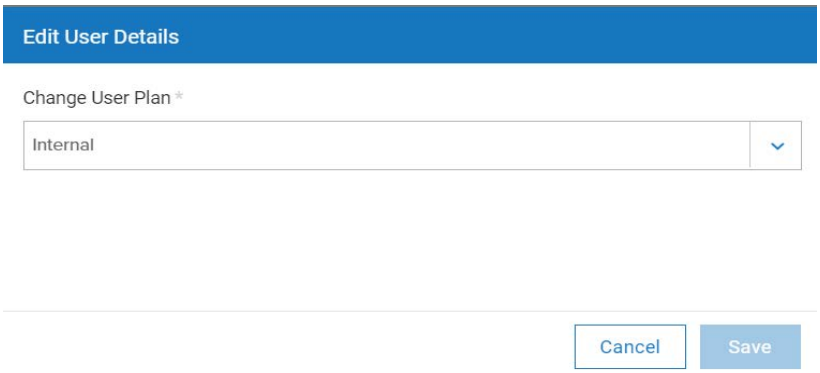
- **Active:** Activate or deactivate a specific user. If you deactivate a user, all their deployments will also be deactivated. Moreover, they will not be able to login to the associated application/website till the time they are activated again.
- **Actions:** Contains action controls to manage users.
    - **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.

3.5.2.2 Updating user plan

You can also update the plan assigned to a user at any time. To do so, click on the 'USERS' tab listed under the 'Settings' menu. 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.



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

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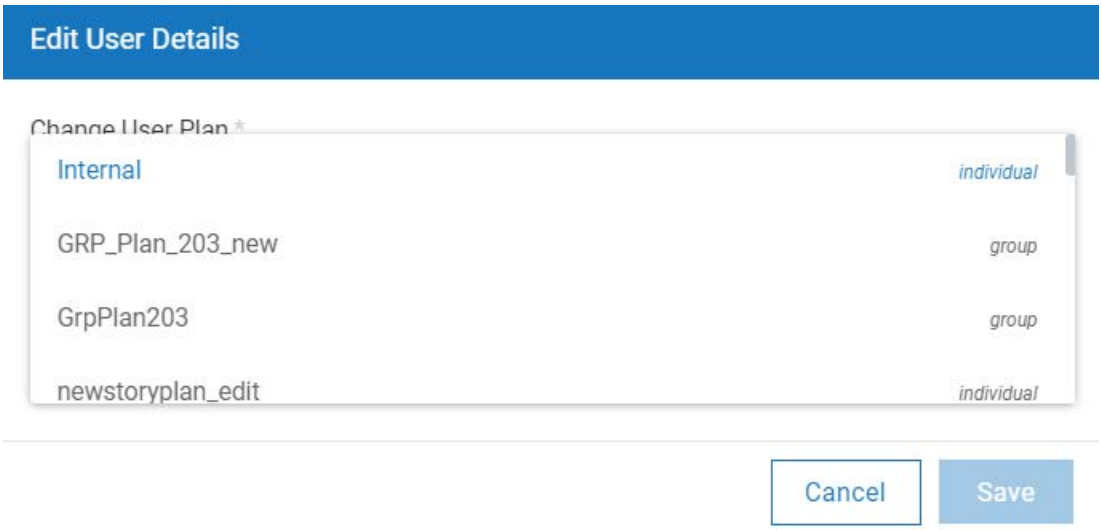
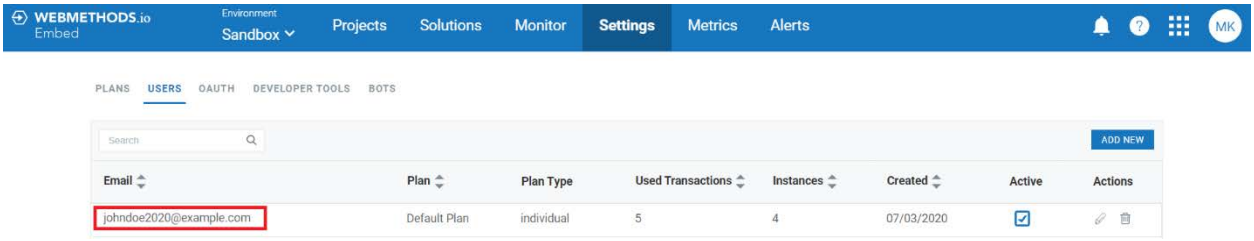


This will change the user's current plan.

3.5.2.3 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.



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.

- **User Execution Statistics:** Get the overall SDK deployment execution statistics of the selected user for the specified timeframe.

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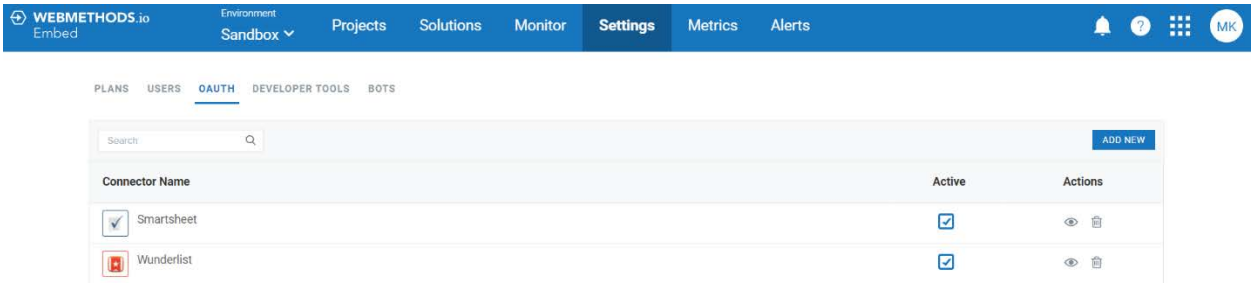
- **Export Deployment:** Download the JSON file for the selected SDK deployment as a backup to your local machine.
- **Show Workflow Execution Statistics:** Get the execution statistics of the selected sdk deployment for the specified timeframe (up to one month).
- **Delete Instance:** Delete the selected instance.

3.5.3 OAuth

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



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).

3.5.3.1 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.

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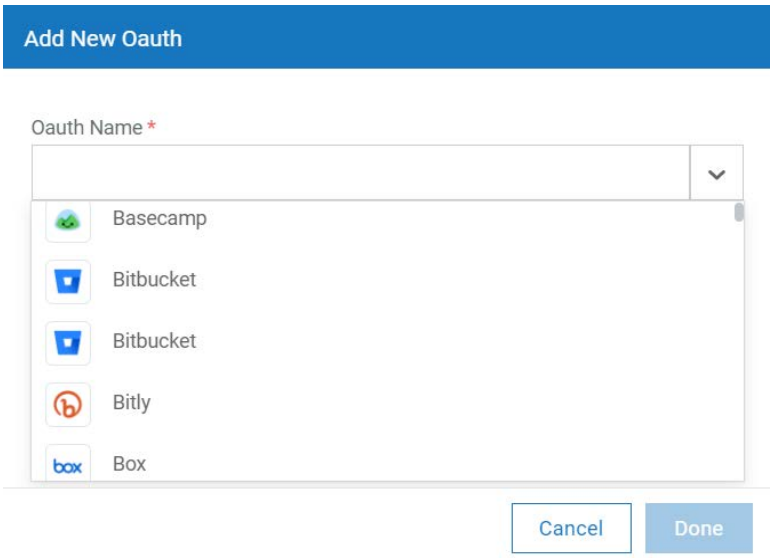
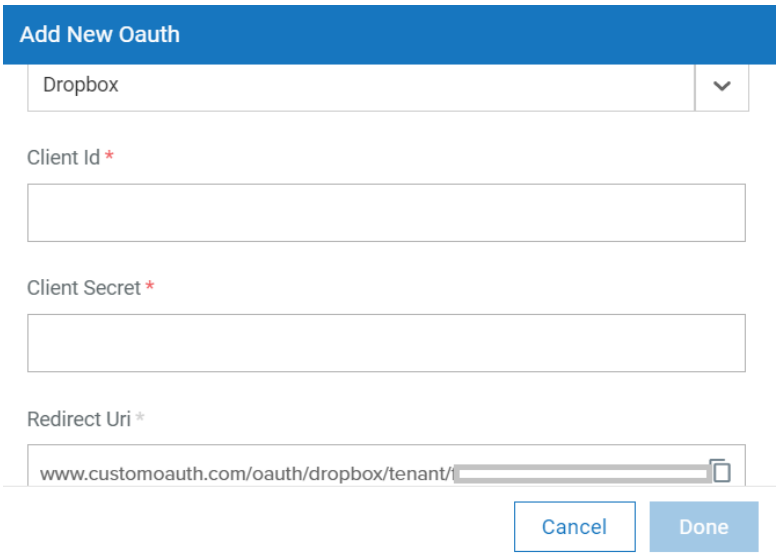


OAuth Name: Select/specify the name of the service for which you want to create an OAuth. Once you create an OAuth for a service, its name will be removed from the 'OAuth Name' drop-down list.

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



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.

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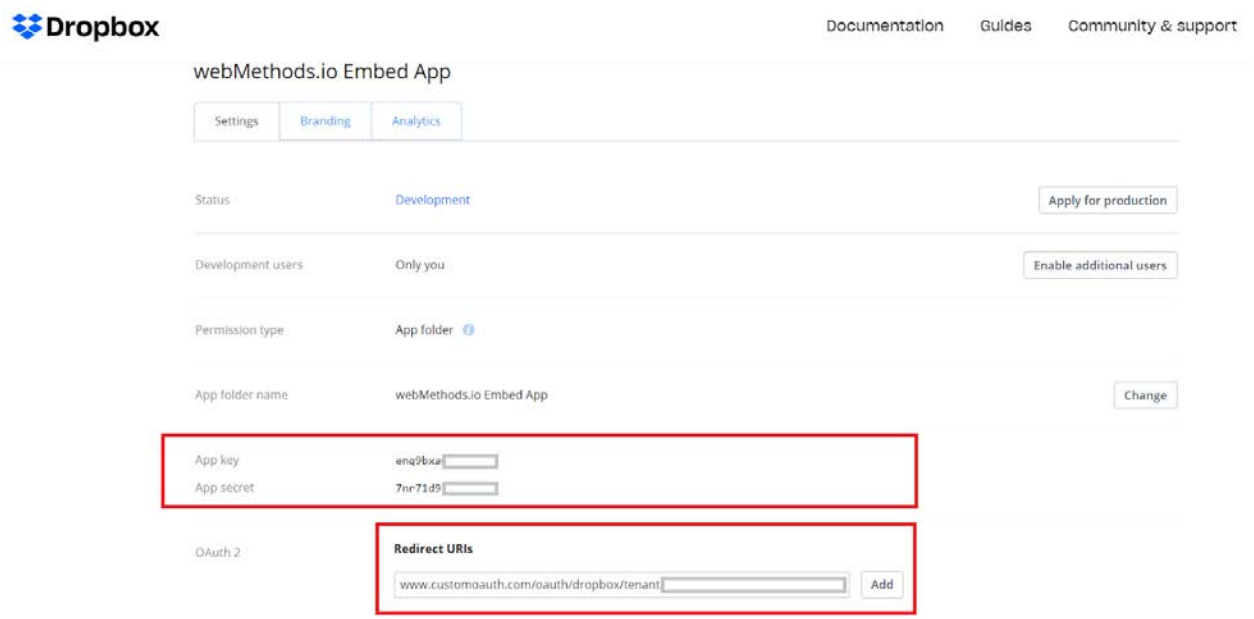
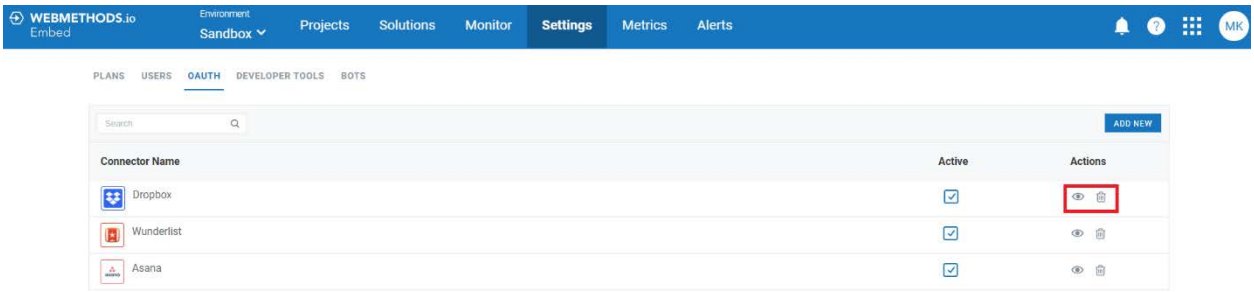


Once you have entered these details, click ‘Done’. This will create an OAuth for the specified service in your Embed Admin.

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

3.5.3.2 Viewing or deleting OAuth

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



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.

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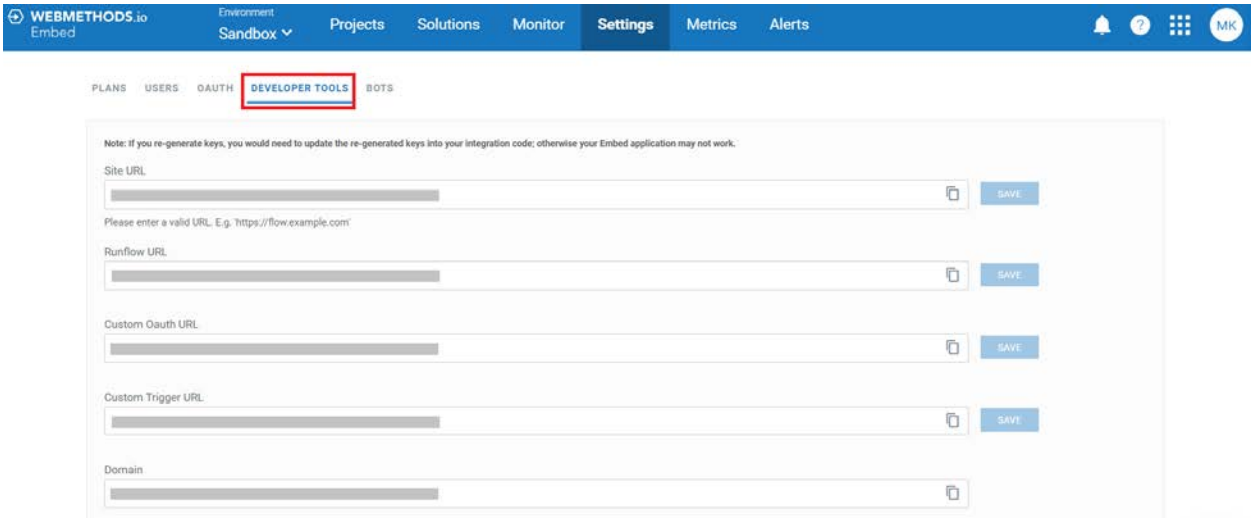
3.5.4 Developer Tools

This option lets you configure important settings of your partner integration account, add custom CSS to your Embed application website and download the code for Embed demo site to get started with custom site development quickly.



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 'RE-GENERATE 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.

Absolute Session Timeout (Hours): Specify the duration (in hours) after which the session will time out.

Idle Session Timeout (Hours): Specify the duration (in hours) during which if user doesn't perform any activity, the session will time out.

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Allow OAuth Popup: Select this checkbox if you want to OAuth creation to take place through a pop-up window.

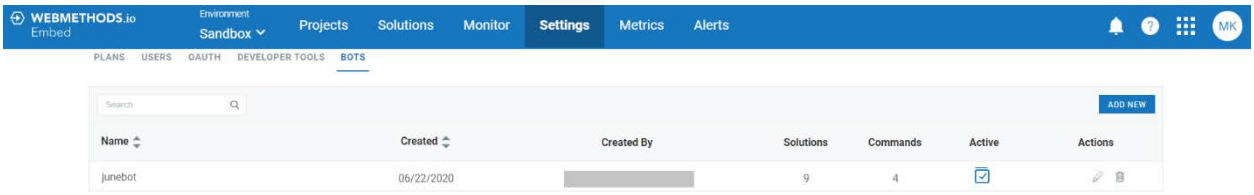
Custom CSS: Enter the custom CSS code in the given block and click 'Add'. This will automatically apply the specified CSS onto your Embed application website.

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.

3.5.5 Bots

You can set up bots for your Embed application. Once set up, they start listening for bot events or any commands sent by the user and perform relevant actions.
This tab lets you view and manage the bots of your Embed Admin account. To do so, navigate to 'Settings > BOTS'.



Here, you can see the list of all available bots of your webMethods.io Embed Admin account, along with the following details:

- **Name:** Name of the bot. Click on it to view and manage the solutions associated with the bot
- **Created:** Date on which the bot was created
- **Created By:** Email ID of the user who created the bot
- **Solutions:** Number of solutions associated with the bot
- **Active:** Whether the bot is active or not. Select or deselect the checkbox to activate or deactivate the bot
- **Actions:** Contains action controls to manage bots.
    - **Edit:** To modify the bot details
    - **Delete:** To delete the bot from Embed Admin
    - **Broadcast Message in 1:1 Space:**

3.5.5.1 Creating a new bot

To create a new bot, click on the 'ADD NEW' button in the top-right hand corner of the 'Bots' page. A new 'Add New Bot' window will appear on the screen.

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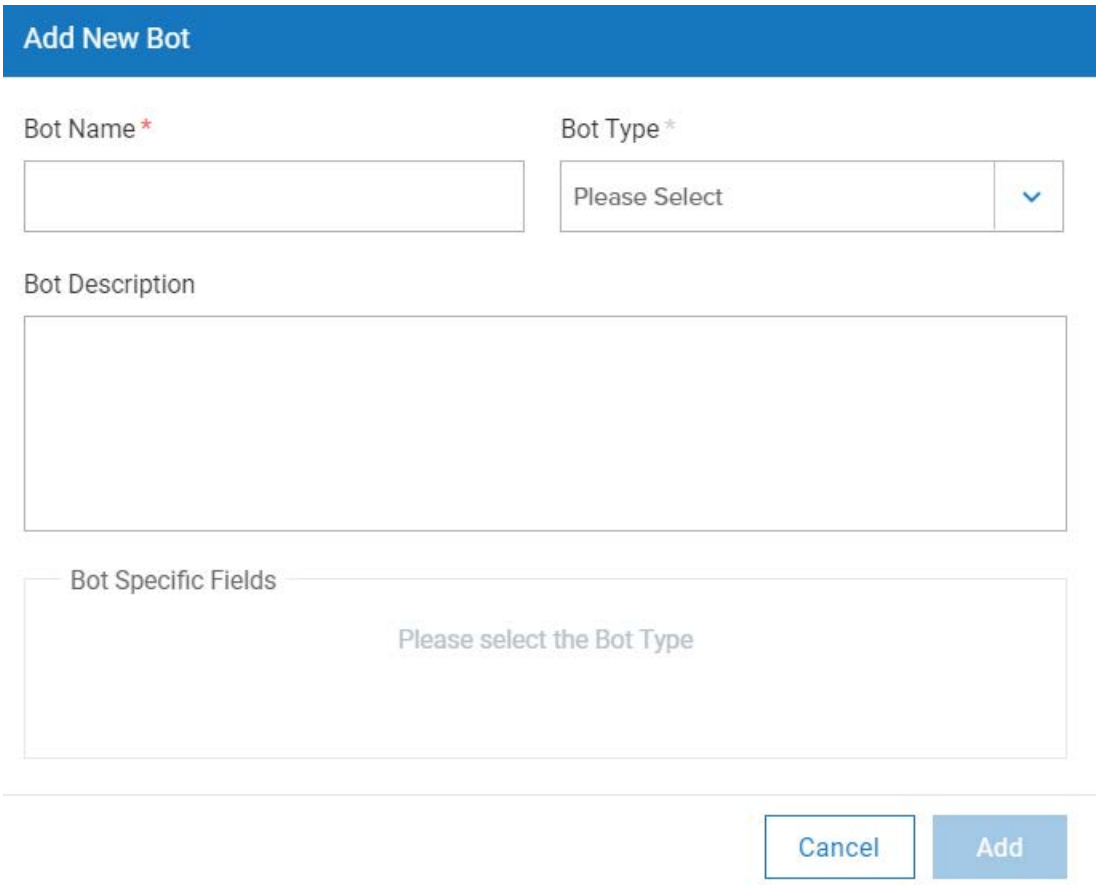

Bot Name: Provide a suitable name for the bot.
Bot Description: Provide a short description about the bot.
Bot Type: Select the type of bot (Cisco Webex 1 way bot/Cisco Webex 2 way bot) you want to add.
As soon as you select a bot type, other fields related to the selected bot will get rendered in the window.

Cisco Webex 1 way bot specific fields

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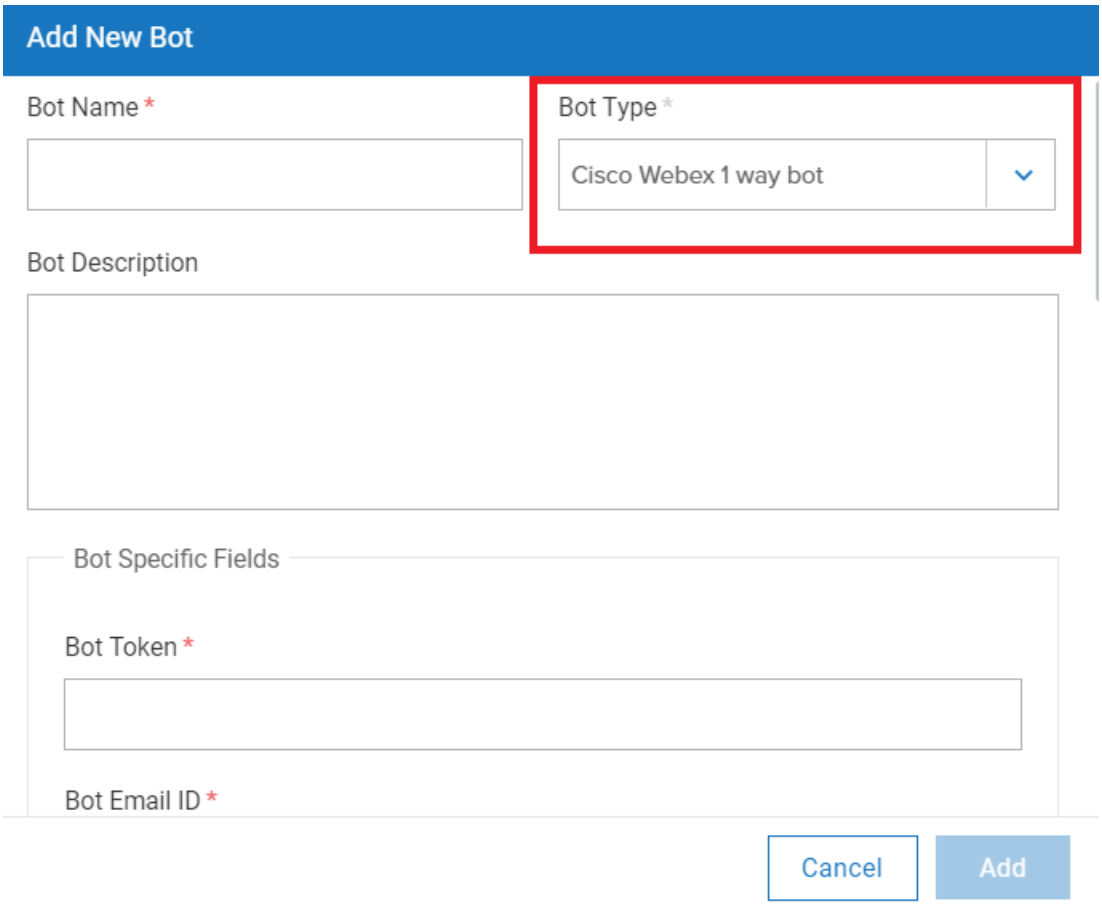

Bot Token: Enter the access token associated with the bot. You will get this access token at the time of creating the bot on Cisco Webex developer site.
Bot Email ID: Enter the email ID associated with the bot.
Bot Person ID: Enter the person ID associated with the bot.
App Hub Link: Enter the link for your App Hub page.
Welcome Message: Enter the welcome message you want the bot to post in Cisco Webex Teams group space when user sends a 'hi' command.
1:1 Welcome Message: Enter the welcome message you want the bot to post in Cisco Webex Teams 1:1 space when user sends a 'hi' command.
Help Message: Enter the help message you want the bot to post in Cisco Webex Teams group space when user sends a 'help' command.
1:1 Help Message: Enter the help message you want the bot to post in Cisco Webex Teams 1:1 space when user sends a 'help' command.

Cisco Webex 2 way bot specific fields

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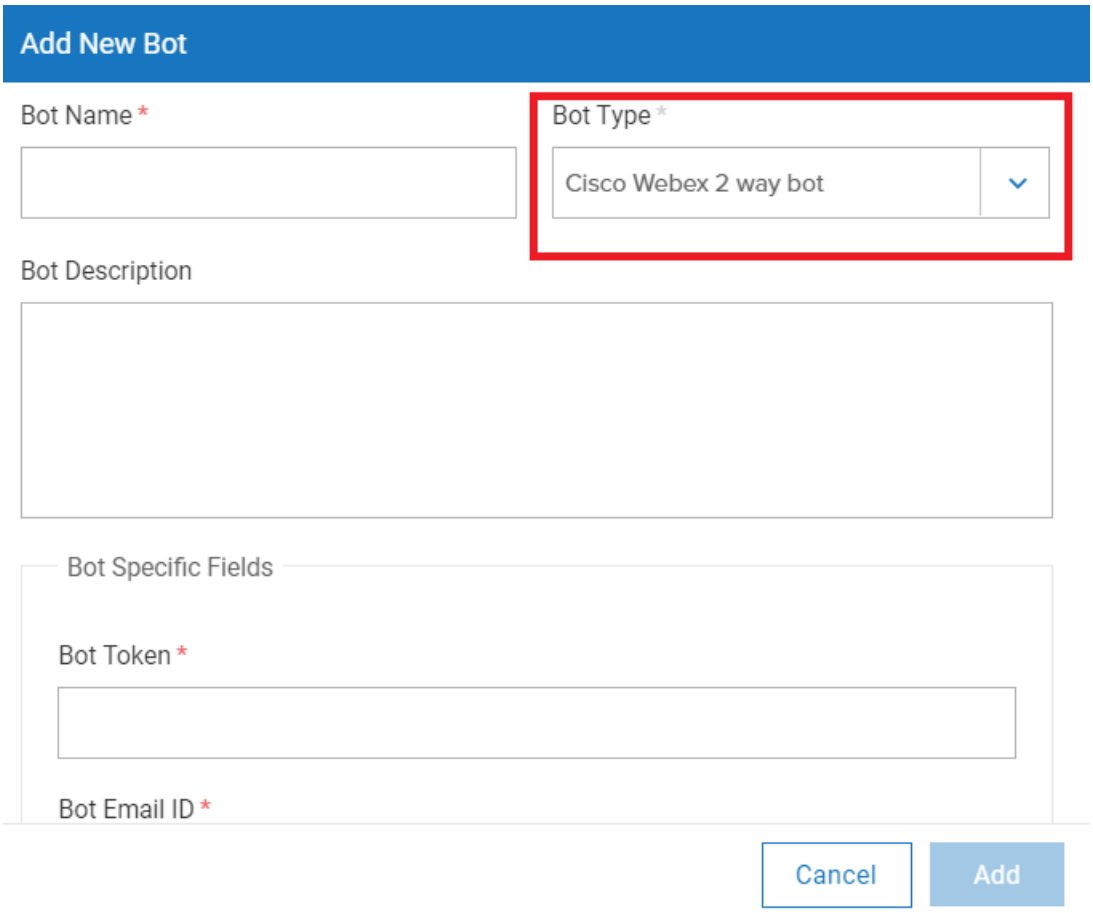

Bot Token: Enter the access token associated with the bot. You will get this access token at the time of creating the bot on Cisco Webex developer site.
Bot Email ID: Enter the email ID associated with the bot.
Bot Person ID: Enter the person ID associated with the bot.
App Hub Link: Enter the link for your App Hub page.
Welcome Card: Enter the message you want the bot to display on the welcome card in Cisco Webex Teams group space when user sends a 'hi' command.
1:1 Welcome Card: Enter the message you want the bot to display on the welcome card in Cisco Webex Teams 1:1 space when user sends a 'hi' command.
Help Message: Enter the message you want the bot to display on the help card in Cisco Webex Teams group space when user sends a 'help' command.
1:1 Help Message: Enter the message you want the bot to display on the help card in Cisco Webex Teams 1:1 space when user sends a 'help' command.
No Auth Welcome Card: Enter the message you want the bot display on the welcome card when service auth is not added to the bot.
Broadcast Card: Enter the message you want the bot to broadcast when it gets converted to an adaptive bot.
Auth Success Card: Enter the message you want the bot to display on the success card when an auth is successfully added to a space.
Bot Provider (ServiceNow, Salesforce): Specify the provider for this bot.

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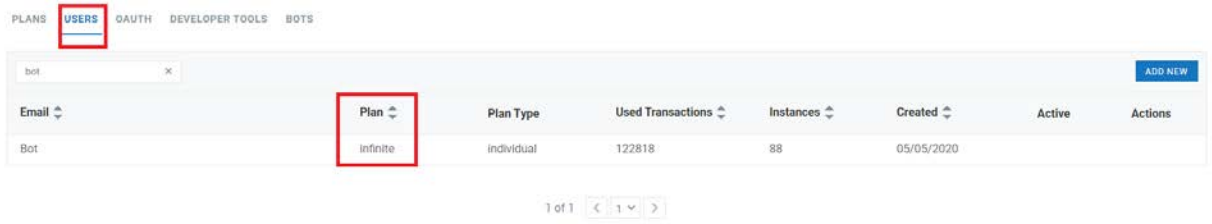
Command Mapping: Enter the JSON object that specifies the command and its corresponding workflow that should be triggered. For example, { "hi" : "asanahi", "help" : "asanahelp", "manage": "asanamanage"} where the words ‘hi’, ‘help’, ‘manage’ are actual commands and ‘asanahi’, ‘asanahelp’, ‘asanamanage’ are the names of the corresponding workflows which must be triggered.
Default Data: Enter the deployment object.
Enable Custom Auth Success Card: Specify whether you want to enable custom auth success messages for this bot.
Adaptive Custom Hi/Help Card: Specify whether you want to enable custom auth welcome/help messages for this bot.
Scope Changes: Specify whether you want to enable scope changes for this bot. If set to true, it allows you to update the existing auth scopes for this bot to match their modified service auth scope requirements.

Once you have entered these details, click on Add. This will add the bot to your webMethods.io Embed Admin account.

To manage bot commands, a default bot plan and a default bot user is created for your tenant by the webMethods.io Embed support team. The details of this default plan or user cannot be edited through the UI.



When you click on the default bot user email, you will see all the instances associated with it.

You can click the **User Execution Statistics** link to get the execution statistics of the default bot user or you can click the **Show Workflow Execution** Statistics icon given against each instance name to get the execution statistics of that instance.

3.5.5.2 Updating or deleting a bot

You can update or delete an existing bot. To do so, navigate to ‘Settings > BOT’. You will see the list of all available bots of your webMethods.io Embed Admin account. Locate the bot you

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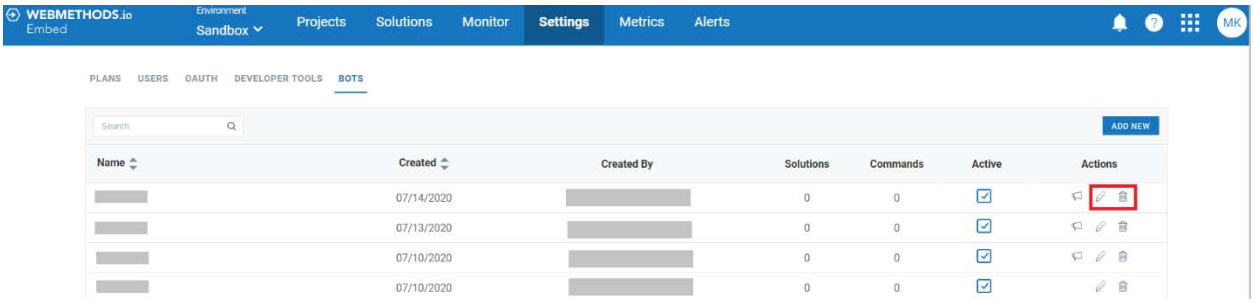
want to update. Click on the associated ‘Edit’ icon to update the bot details or click ‘Delete’ icon to delete the bot.

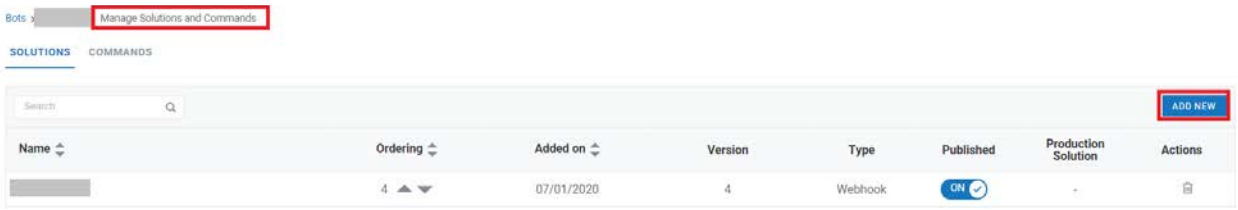
Note:

- You cannot edit the values for ‘Bot Email ID’, ‘Bot Person ID’, and ‘Bot Type’.
- The ‘Bot Token Field’ will not be visible in the ‘Edit Bot’ window.



3.5.5.3 Adding solutions to a bot

Once you have created a bot, you can add existing solutions of your webMethods.io Embed Admin account to a bot. To do so, navigate to ‘Settings > BOT’. You will see the list of all available bots of your account. Locate the bot to which you want to add a solution and click on it. You will be redirected to the ‘Manage Solutions and Commands’ window.



To add a solution to the selected bot, click on ‘ADD NEW’ button on the top-right corner of the window. A new ‘Add Solutions to Bot’ window will appear on screen where you can see the list of existing solutions of your Embed Admin account along with their versions.

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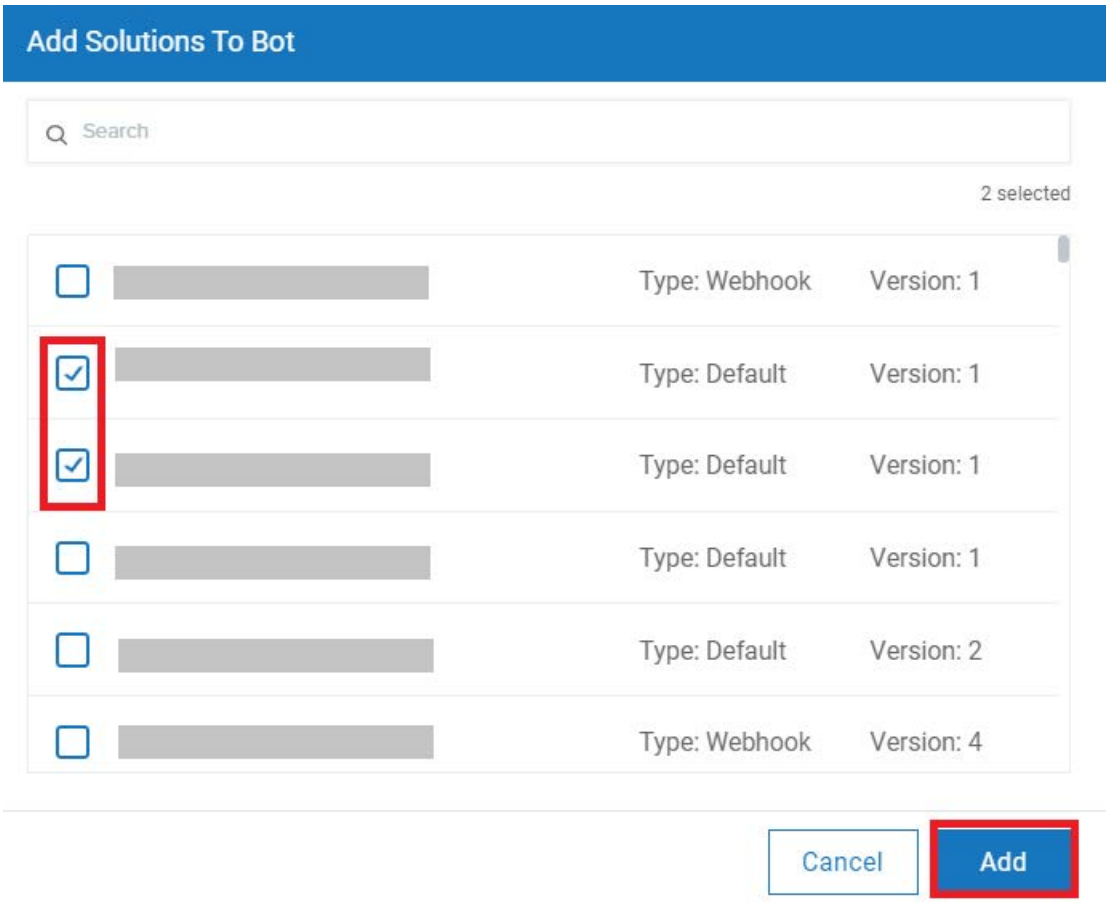
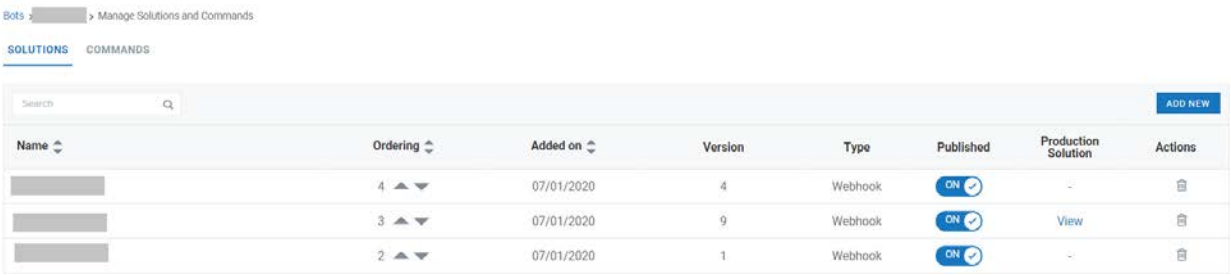


Select the checkbox given beside the solution name and click on ‘Add’. This will add the selected solution(s) to the bot.



3.5.5.4 Managing solutions associated with a bot

Once you have added solutions to a bot, you can view and manage them through the ‘Manage Solutions and Commands’ screen. To do so, navigate to ‘Settings > BOT > Bot_Name’.

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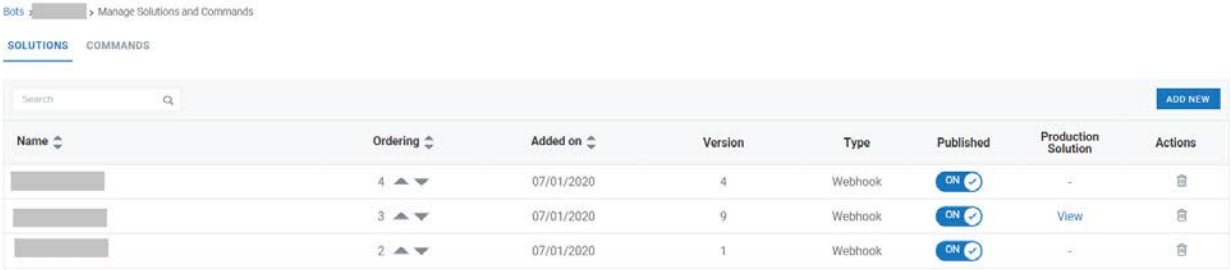


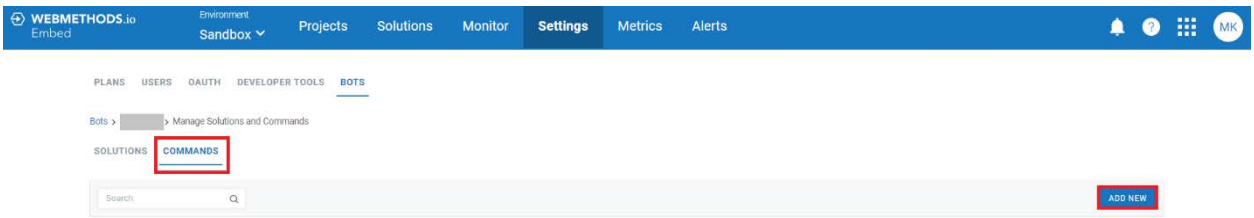
Here, you can view all the solutions associated with the selected bot, along with the following details:

- **Name:** Name of the solution
- **Ordering:** Specify the order sequence for solution
- **Added on:** Date on which solution was added to bot
- **Version:** Version of the solution
- **Type:** Type of solution (Webhook/Default)
- **Published:** Whether the solution is published on Sandbox environment or not. You can publish or unpublish the solution for the selected bot using the toggle button.
- **Production Solution:** Whether the solution is published on production environment or not. If the solution is published on production environment, you will see a 'View' link. Click on this link to automatically navigate to this solution version on production environment. Similarly, if you are working in the Production environment, you will see a view link which will automatically navigate you to this solution version in the Sandbox environment.
- **Action:** Contains action controls to manage bots.
    - **Delete:** Delete the solution from the selected bot.

You can also add more solutions to the bot using the 'ADD NEW' button.

3.5.5.5 Adding commands to a bot

Once you have created a bot, you can add existing commands of your webMethods.io Embed Admin account to a bot. To do so, navigate to 'Settings > BOT'. You will see the list of all available bots of your account. Locate the bot to which you want to add a solution and click on it. You will be redirected to the 'Manage Solutions and Commands' window. Click on the COMMANDS tab.



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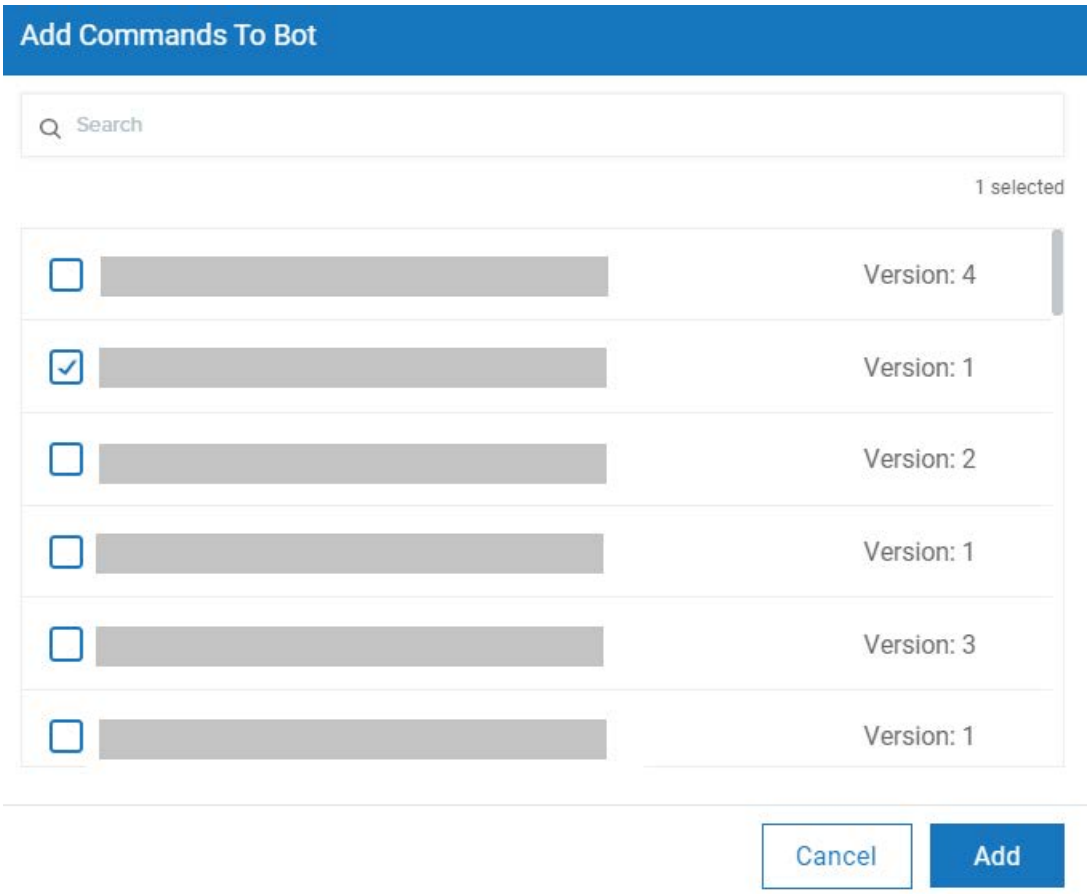
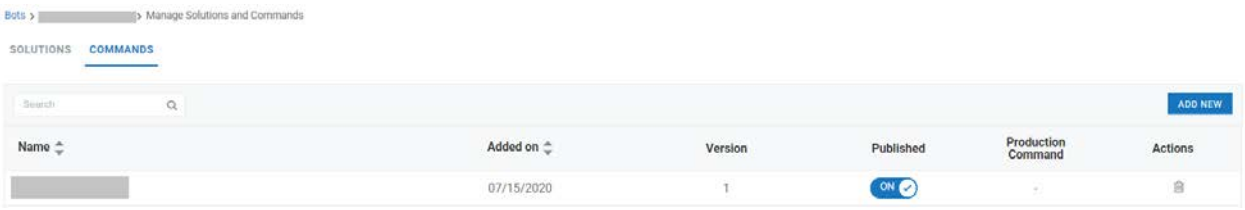
To add a command to the selected bot, click on 'ADD NEW' button on the top-right corner of the window. A new 'Add Commands to Bot' window will appear on screen where you can see the list of existing commands of your webMethods.io Embed Admin account along with their versions.



Select the checkbox given beside the command name and click on 'Add'. This will add the selected commands(s) to the bot.



3.5.5.6 Managing commands associated with a bot

Once you have added command(s) to a bot, you can view and manage them through the 'Manage Solutions and Commands' screen. To do so, navigate to 'Settings > BOT > Bot_Name' and then click on COMMANDS tab.

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Here, you can view all the commands associated with the selected bot, along with the following details:

- **Name:** Name of the command
- **Added on:** Date on which command was added to bot
- **Version:** Version of the command
- **Published:** Whether the command is published on Sandbox environment. You can publish or unpublish the solution for the selected bot using the toggle button.
- **Production Command:** Whether the command is published on production environment or not. If the command is published on production environment, you will see a 'View' link. Click on this link to automatically navigate to this command version on production environment. Similarly, if you are working in the Production environment, you will see a view link which will automatically navigate you to this solution version in the Sandbox environment.
- **Action:** Contains action controls to manage bots.
    - **Delete:** Delete the command from the selected bot.

You can also add more commands to the bot using the 'ADD NEW' button.

3.5.6 Metrics

The 'Metrics' option lets you view the usage statistics of your Embed enabled application/website. When you click on the Metrics menu, you will see the following tabs:

- EXECUTION OVERVIEW
- FILTER-BASED EXECUTION DETAILS

Let's know more about these tabs in detail.

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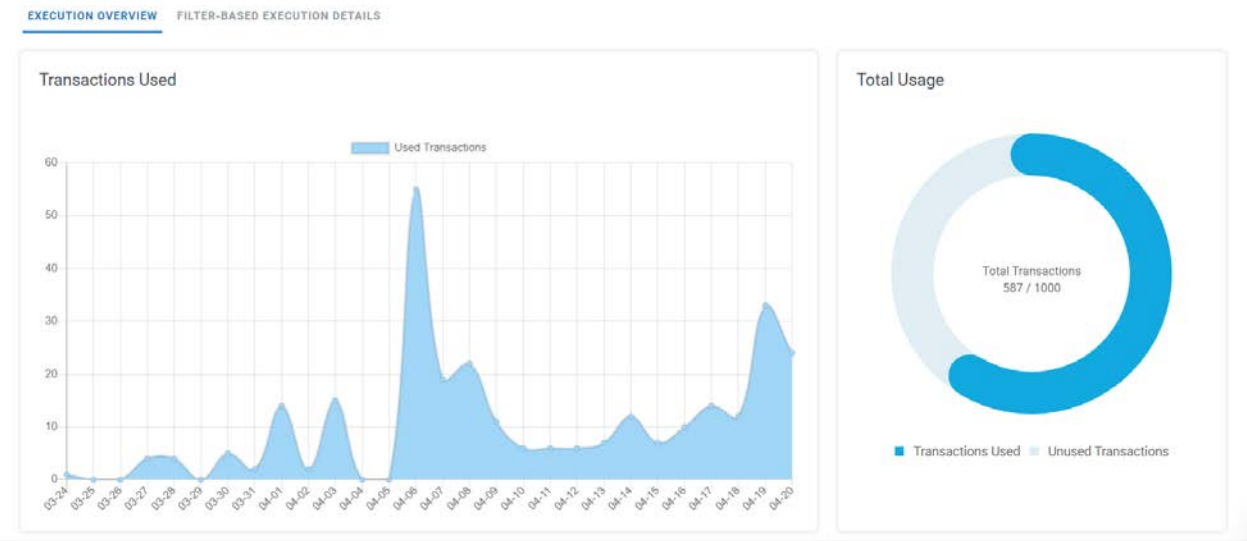

3.5.6.1 Execution Overview

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).

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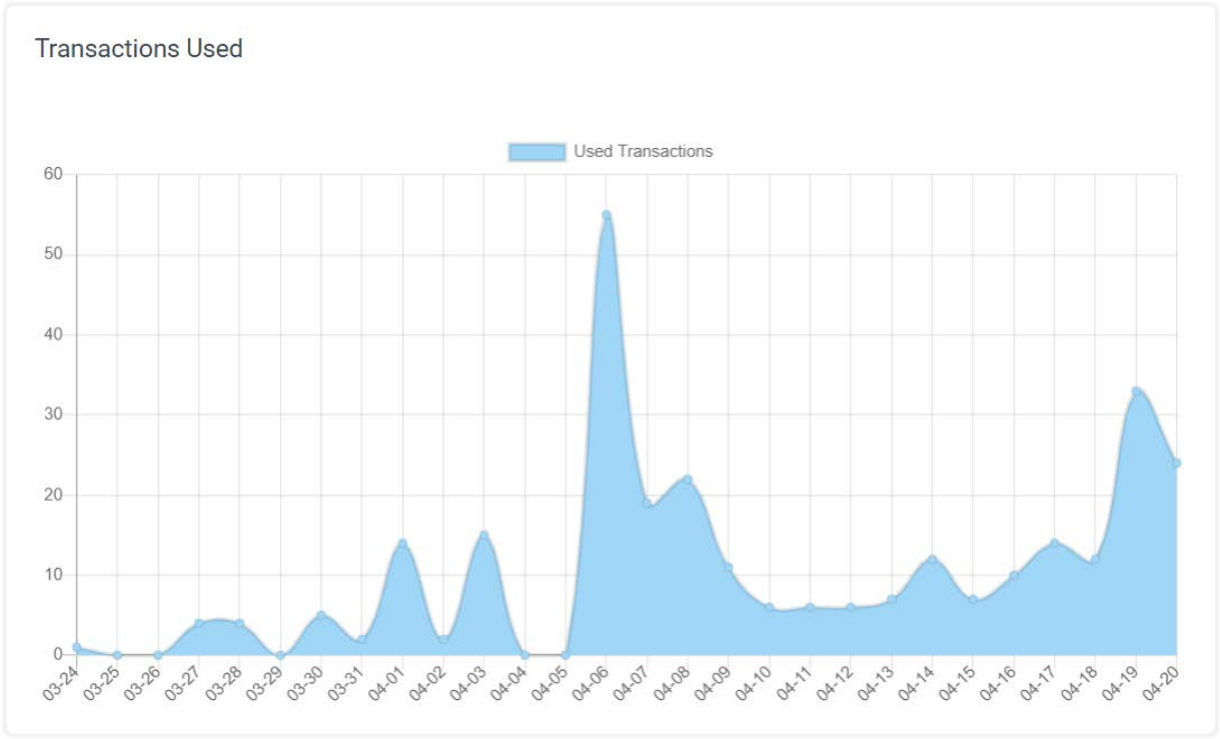

Total Usage

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

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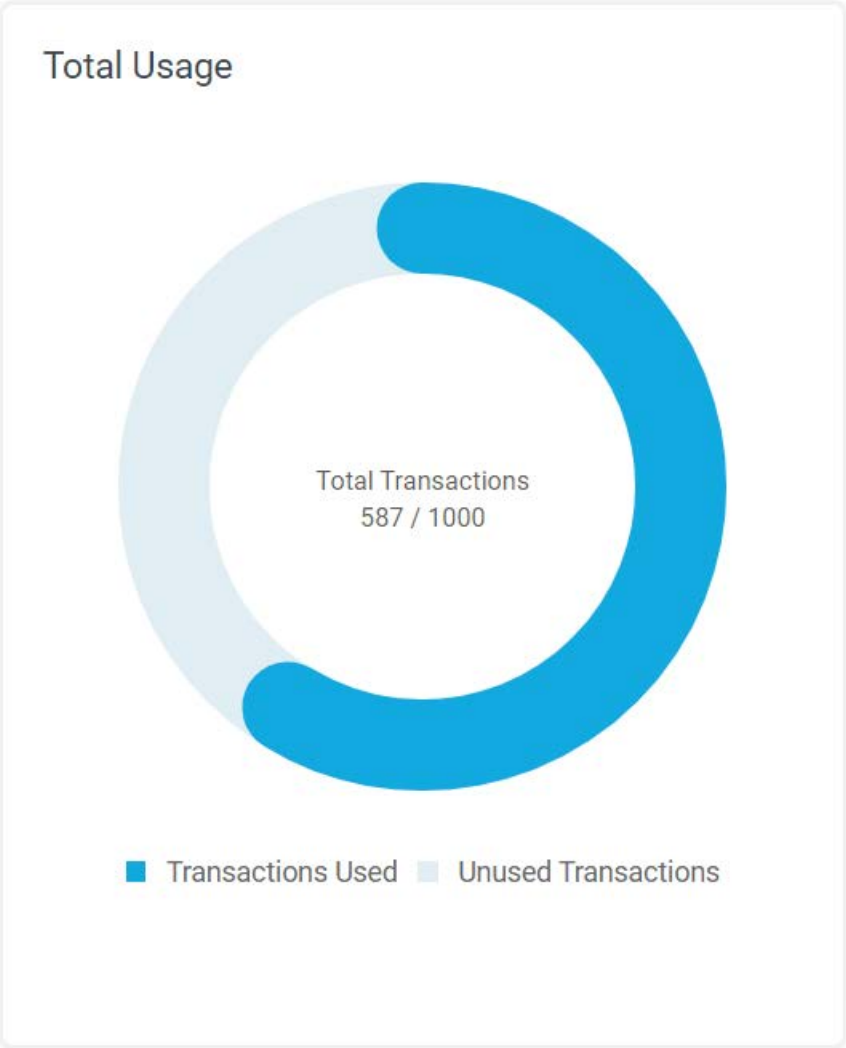

Top Active Integrations

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

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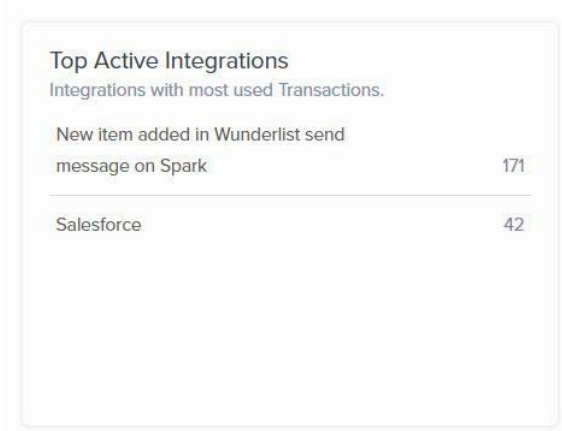
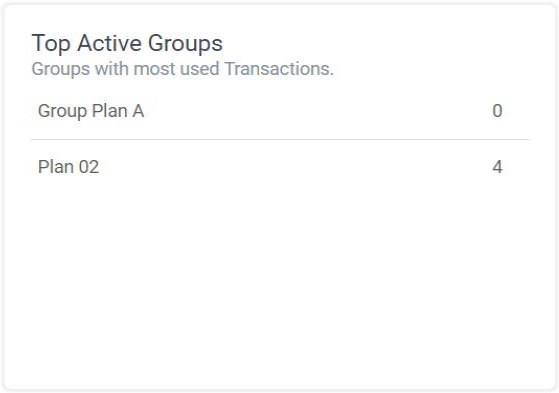


Top Active Groups

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



Top Active Users

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

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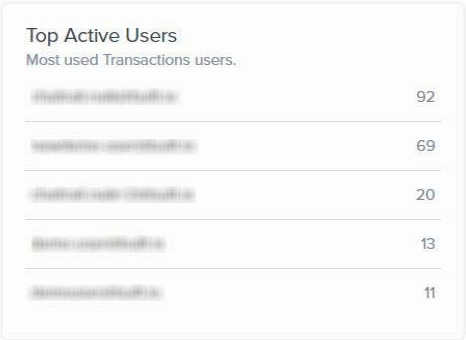
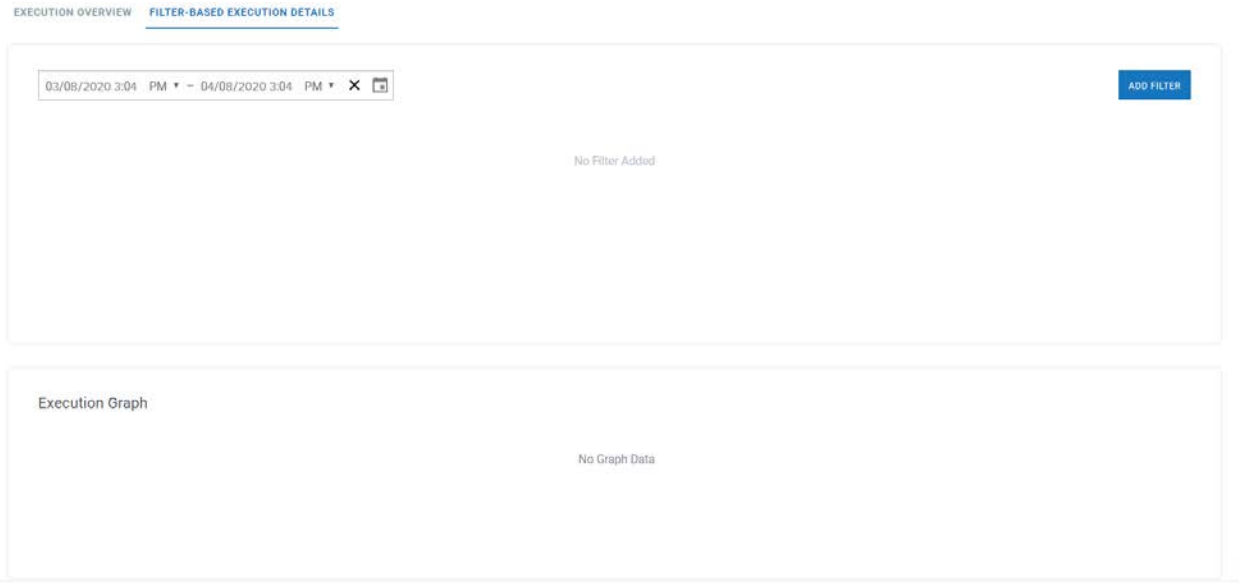


3.5.6.2 Filter-based Execution Details

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 'Metrics > FILTER-BASED EXECUTION DETAILS' page.



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.

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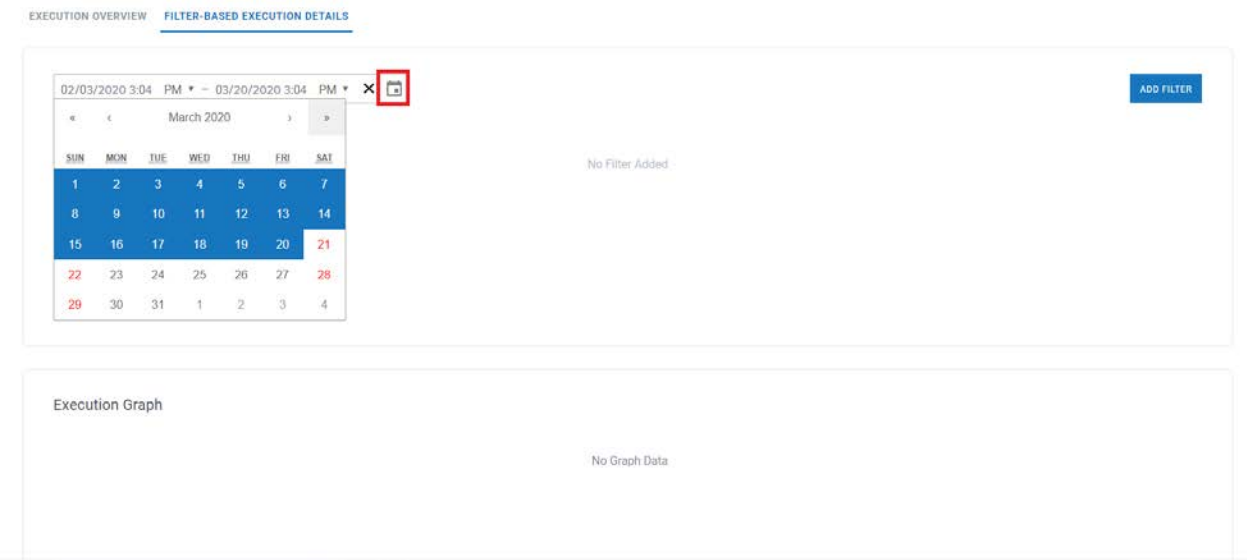
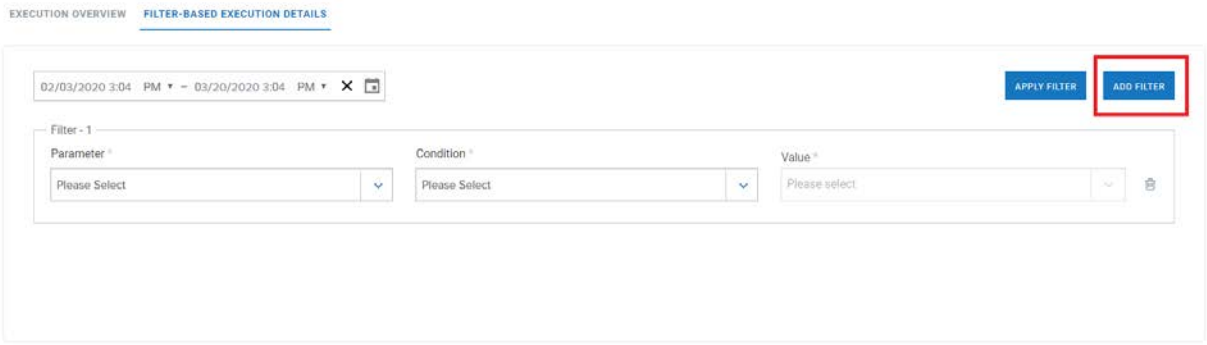


Adding Filters

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.



- **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.

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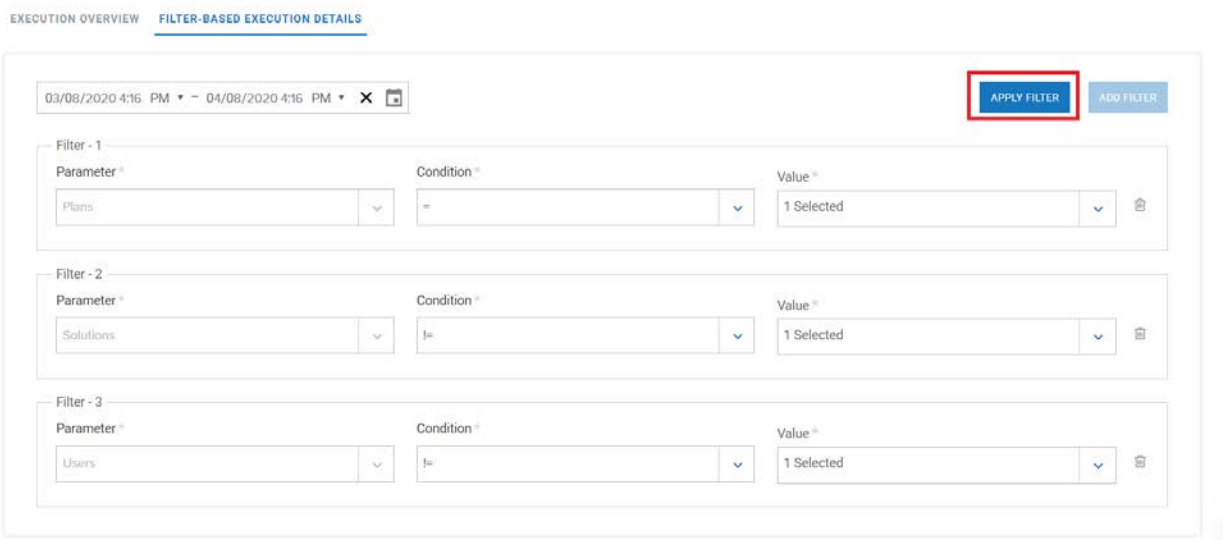
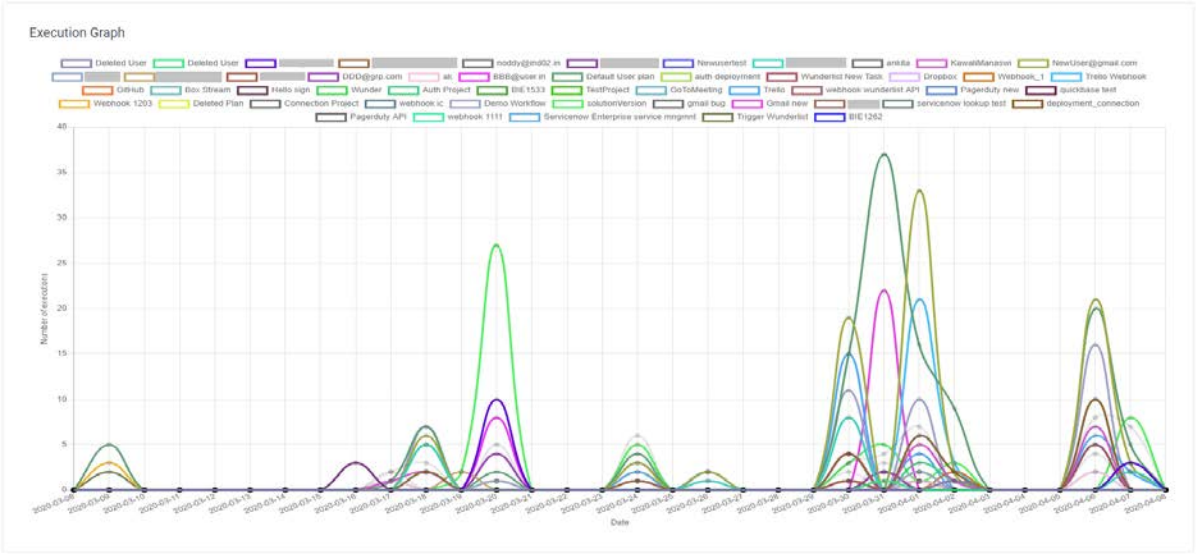


Once this is done, click on the APPLY FILTER button. You will see the execution graph for the selected filters.



3.5.7 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

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- 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, click on Alert menu.

- **Enable usage alerts:** Select the checkbox to enable usage alert emails for your webMethods.io 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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