

KRYON™

BE YOUR FUTURE

User Guide

Kryon Admin v5.25.1

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CHAPTER 1: Introduction

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An Overview of Kryon Admin

Kryon Admin is the application used by administrators to manage the Kryon RPA Platform: setting up companies, managing licensing and credentials, defining automation libraries and supported applications, etc.

After installation of the Kryon Application Server and clients (Kryon Robots and Studio), the next step is to set up the RPA environment using Kryon Admin. (For complete information on installing the Kryon Application Server and clients, see the *Kryon RPA Platform Installation & Upgrade Guide*).

These are the steps required to set up the Kryon RPA environment:

- [Create a company](#)
- [Activate the Kryon RPA license](#)
- [Enable the Kryon Credentials Vault](#)
- [Create users](#)
- [Define the business applications](#) that will be used in automations
- [Create libraries in the Catalog](#) (to house all automations)

Each of these steps is covered in a separate chapter of this guide.

Glossary

The following terms are essential to understanding Kryon RPA functionality and are used throughout this guide.

| Term | Description |
|---|---|
| RPA developer | A Kryon Studio user who creates, edits and manages Kryon automations |
| Robotic Process Automation (RPA) | <p>A form of process automation technology based on the notion of software robots. A software robot (Kryon Robot) is a software application that replicates the actions of a human being interacting with the user interface of a computer system. For example, the execution of data entry into an SAP system – or indeed a full end-to-end business process – would be a typical activity for a Kryon Robot. The robot operates on the user interface (UI) in the same way that a human would. In addition Kryon's technology can run background activities using web services, SQL queries, DLL and integration technologies (such as SAP, HTML, .NET, Excel, PDFs, emails, etc.)</p> <p>Kryon RPA can also assist human end users in performing their tasks, either by walking them through the task step-by-step or by performing the task for them right on their desktop</p> |
| Kryon Application Server | The Kryon RPA Platform is a client-server solution. Kryon Robots, running on client desktops/VMs, are connected to a central server (repository) to obtain and execute automation wizards. The Kryon Server is a central repository that stores all automations, collects end-user usage statistics, and manages licenses and permissions. |
| Robot | <p>A lightweight client that runs wizards on target applications</p> <ul style="list-style-type: none"> • Kryon Unattended Robot: installed on a virtual machine and runs wizards with no human intervention • Kryon Attended Robot: installed on an end-user desktop and runs wizards on the user's applications |
| Catalog | A hierarchical tree of libraries, categories and automations for predefined applications |
| Library | The top-level folder in the catalog, containing the categories that, in turn, contain automations |
| Category | A library subfolder that contains automations |

| Term | Description |
|--------------------|---|
| Automations | Wizards and sensors listed in the catalog |
| Wizard | <p>An intelligent pre-developed script – created using Kryon Studio, stored on the Kryon Server, and run by Kryon Robots</p> <ul style="list-style-type: none"> • In the context of Kryon’s unattended automation solution, Kryon Unattended Robots automatically run wizards on target applications • In the context of Kryon’s attended automation solution, human end-users run wizards on target applications using Kryon Attended Robots |
| Sensor | <p>A powerful guard that intervenes only when a predetermined criteria is met, as if there were a trainer watching over the user’s shoulder</p> <p>Sensitive to the context on the screen and to user behavior, sensors are used to push notifications and relevant information, as well as to validate user input and block user errors.</p> |

Accessing Kryon Admin

Kryon Admin is installed automatically on the server as part of the Application Server installation.

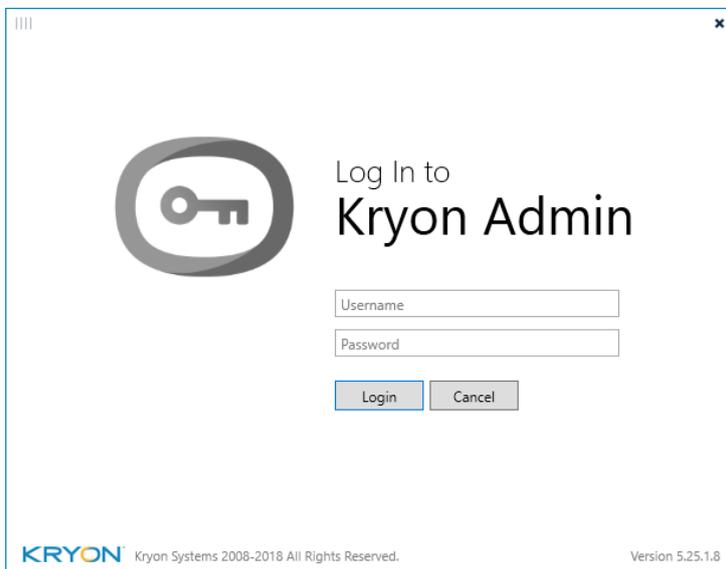


NOTE

The default installation path for the Kryon Admin application is `C:\Program Files\Kryon Application Server\Kryon Admin Client 64bit\`.

To launch Kryon Admin:

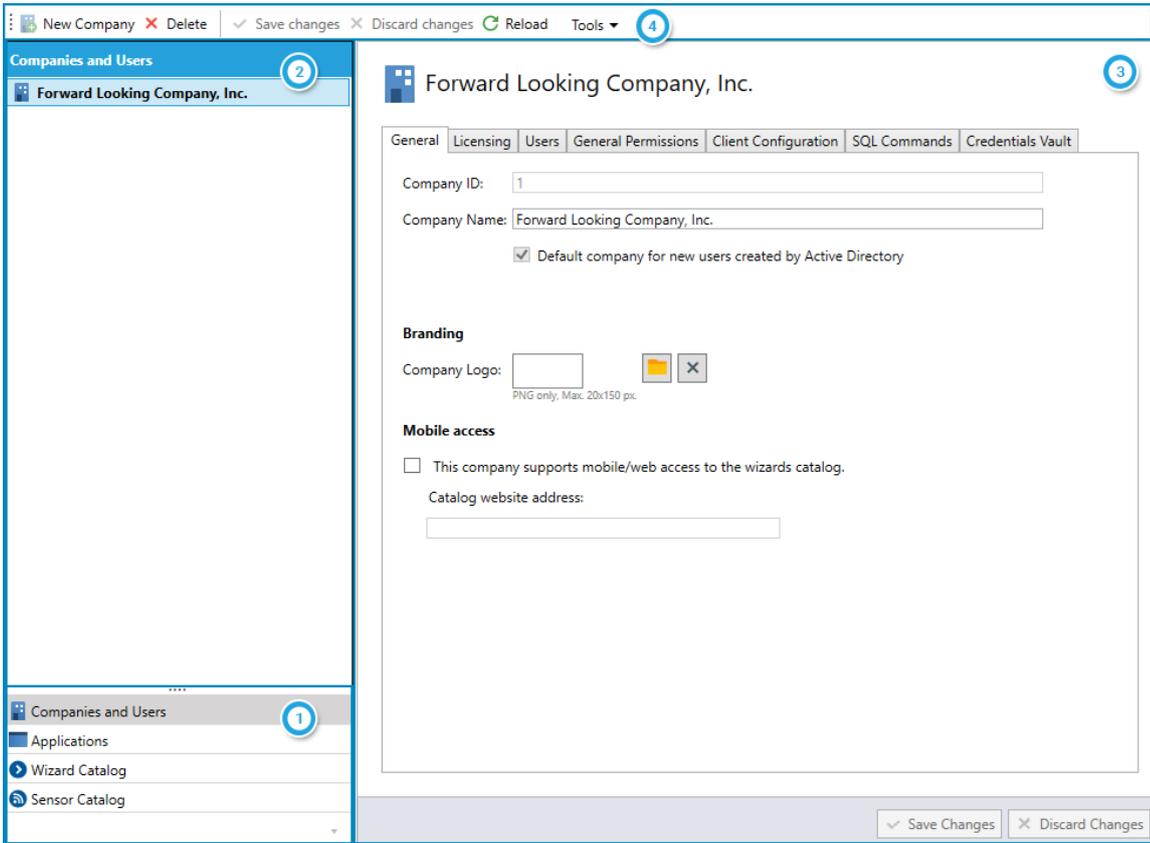
1. Go to the **Windows Start** button  and type `Kryon Admin` (or simply scroll down to its icon in the menu)



2. Enter the username and password provided to you by the Kryon Support Team

A Tour of Kryon Admin

The Kryon Admin main window is organized into panes, as further detailed below:



1 Menu Pane

Kryon Admin enables you to work with the main elements of the RPA platform:

- Companies and Users
- Applications
- Catalogs (i.e., the Wizard Catalog and the Sensor Catalog)

These main elements are listed in the **Menu Pane**

2 Entities Pane

When you select an element in the **Menu Pane**, the **Entities Pane** will list all the entities that have been created within that element:

- When you select **Companies and Users**, the **Entities Pane** will list all companies
- When you select **Applications**, the **Entities Pane** will list all applications
- When you select the **Wizard Catalog**, the **Entities Pane** will list all libraries in the wizard catalog and the categories within them
- When you select the **Sensor Catalog**, the **Entities Pane** will list all libraries and the categories within them

NOTE: The Wizard and Sensor Catalogs share the same libraries. Categories created within the libraries vary between the Wizard and Sensor Catalogs.



Properties Pane

When you select an entity in the **Entities Pane**, the **Properties Pane** will display all the properties relevant to the selected entity type. Properties are organized in tabs to make them easier to locate and navigate.

- For example, if you have selected **Applications** from the **Menu Pane**, then selected a specific application from the **Entities Pane**, the **Properties Pane** will display all of that application's properties



Toolbar

The toolbar located at the top of the Admin screen provides access to additional actions related to the type of element you are working with

CHAPTER 2: Managing Companies

A company is the basic organizational unit within the Kryon RPA Platform. A company can be an entire organization, or a division, unit, or team within that organization.

Each company has its own:

- [Users and user groups](#)
- [Kryon RPA license](#)

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Creating a Company

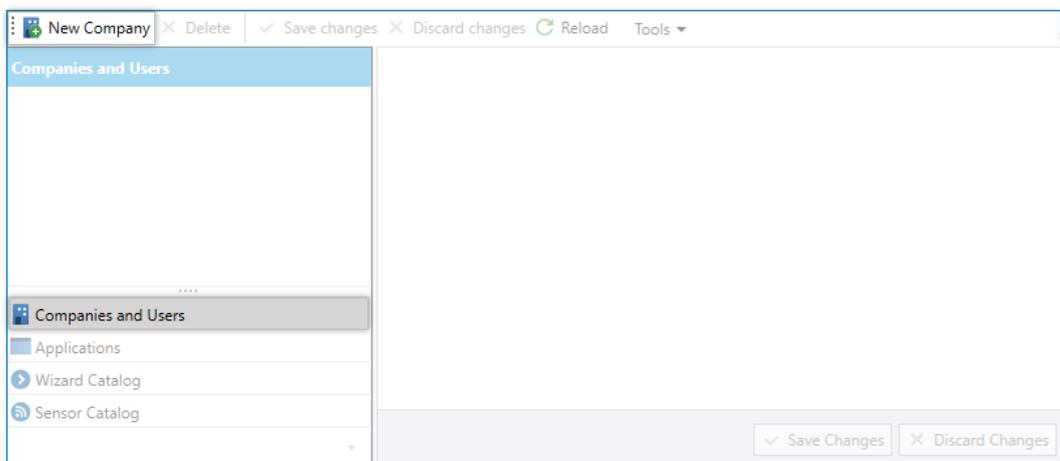


NOTE

This guide covers the setup of a single company per Kryon Application Server. If your organization requires more than one company per server, contact the Kryon Support Team for assistance.

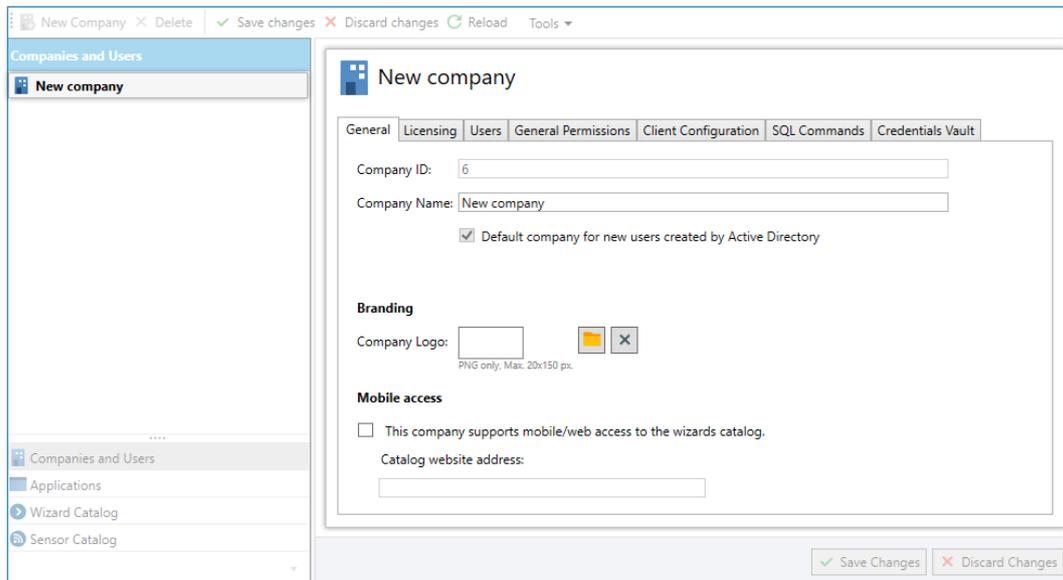
To create a company:

1. In the [Menu Pane](#), click **Companies and Users**
2. From the toolbar, click the **New Company** button



3. An company called **New company** is created in the [Entities Pane](#)

The new company is automatically selected, and its properties appear in the [Properties Pane](#), with the **General** tab active



4. Enter a name for the company in the **Company Name** field
5. Click the  button

Deleting a Company

To delete a company:

1. In the [Menu Pane](#), click **Companies and Users**
2. In the [Entities Pane](#), select the company you want to delete
3. From the toolbar, click the  **Delete** button
4. In the confirmation message, click **Yes**



CAUTION

When you delete a company, its users, user data, and license information are also deleted.

CHAPTER 3: Activating Your Kryon RPA License

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Two Methods of License Activation

In order to use the Kryon RPA platform, you must first receive a license file from your Kryon RPA sales contact. In the most cases, the license file requires activation via the Internet. However, if your Kryon Application Server does not have readily available internet access, you can receive a license file that does not require internet activation.

Activating via the Internet

If you will be activating your license via the Internet:

1. Follow the steps described in [Activating Your License](#).
 - Skip **Creating a Company Key**, as these steps do not apply to internet activation

Activating without the Internet

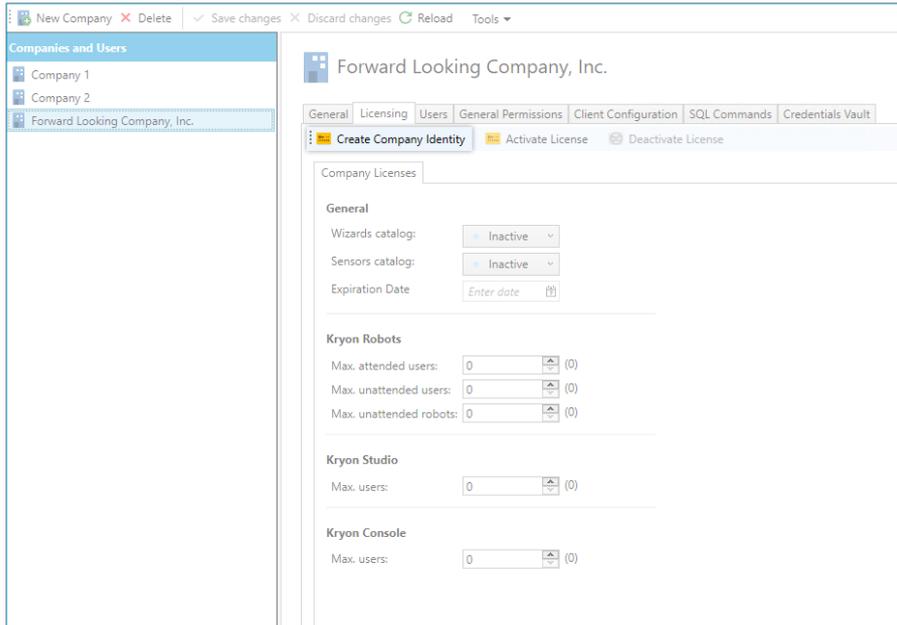
If you will be activating your license without an internet connection:

1. Follow the steps in [Creating a Company Key](#)
2. Then proceed to the steps in [Activating Your License](#)

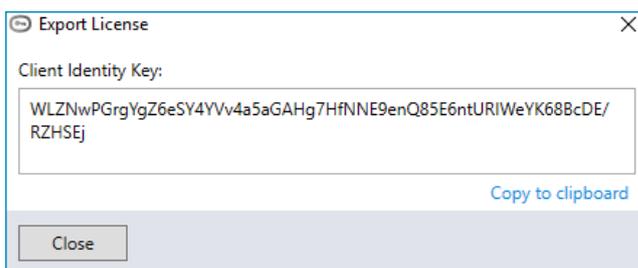
Creating a Company Key

To create a company key:

1. In the [Menu Pane](#), click **Companies and Users**
2. In the [Entities Pane](#), select the company for which you want to create a key and receive a license
3. In the [Properties Pane](#), select the **Licensing** tab
4. Click **Create Company Identity**



5. From the dialog box that opens, click **Copy to clipboard** to copy the generated company key



6. Send the company key to your Kryon RPA sales contact, who will use it to generate your license file
7. After you receive your license file, proceed to [Activating Your License](#)

Activating Your License

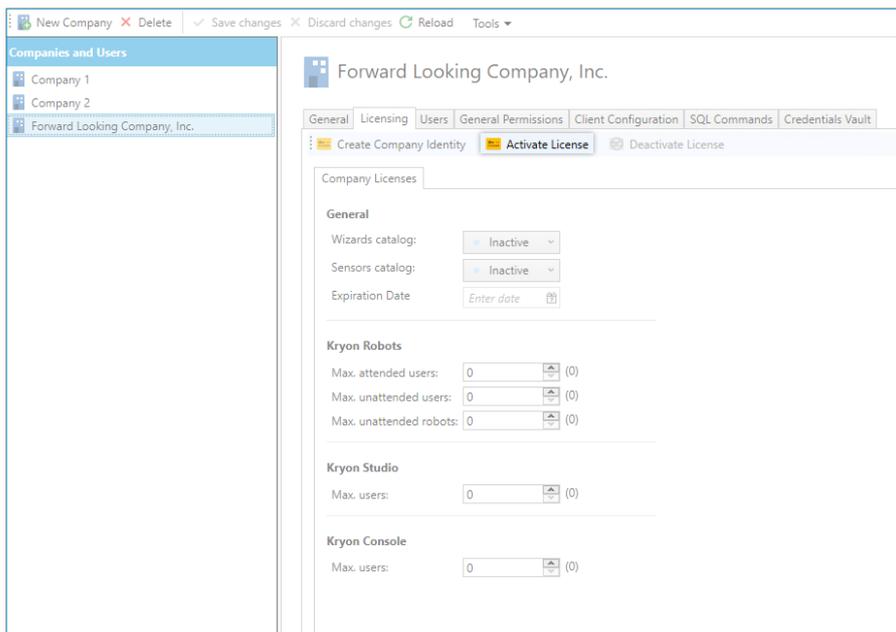


NOTE

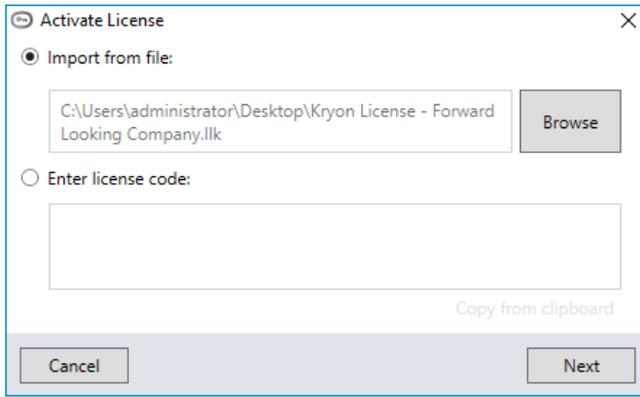
The following steps apply to **both license activation methods** (either with or without the Internet)

You will receive a license file – `Kryon License - {Company Name}.llk` – from your Kryon RPA sales contact. Save the file to a location from which you can easily access it on the Kryon Application Server, then follow these steps to activate it in Kryon Admin:

1. In the **Menu Pane**, click **Companies and Users**
2. In the **Entities Pane**, select the company for which you are activating the license
3. In the **Properties Pane**, select the **Licensing** tab
4. Click **Activate License**



5. From the dialog box that opens, select the option to **Import from file**, click and navigate to the license file you saved

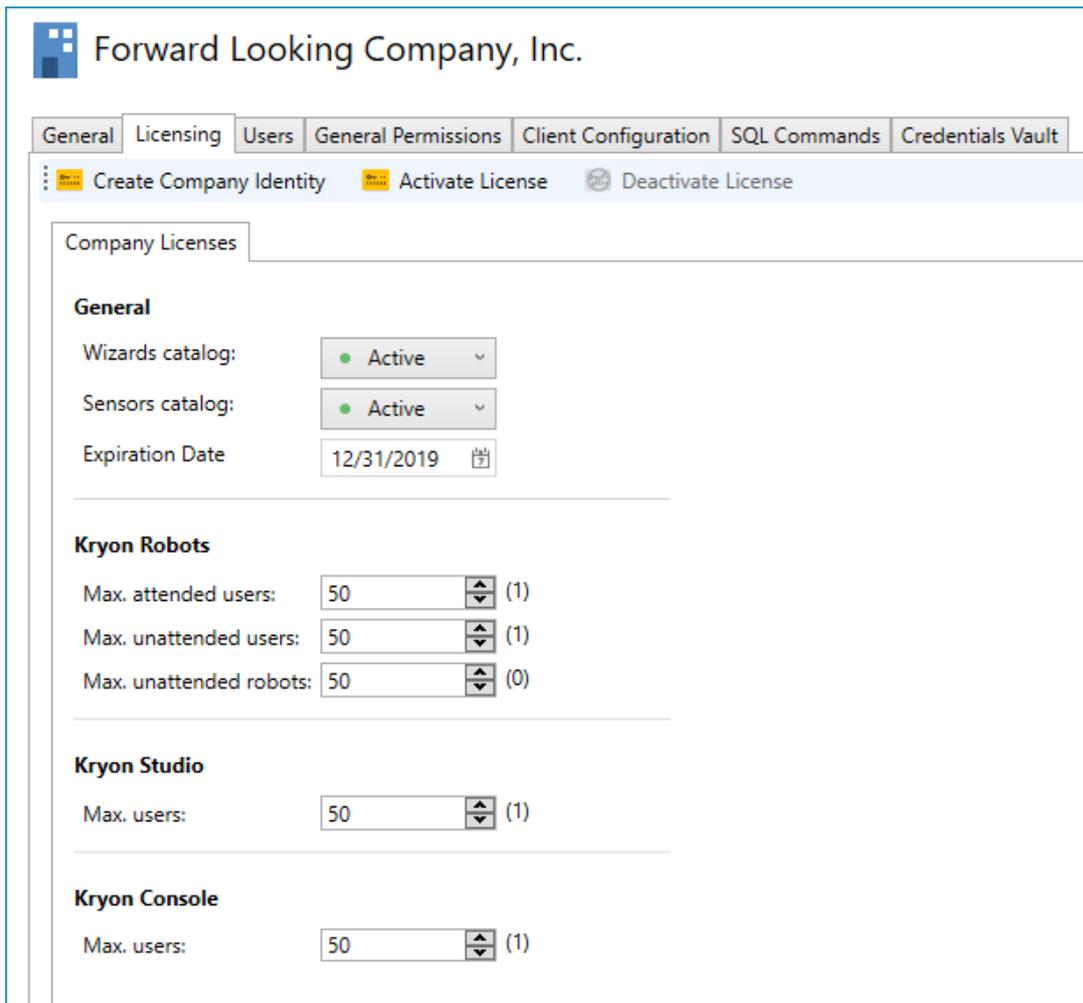


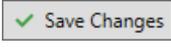
6. Click
7. For **internet activation licenses** (i.e, created without a company key), you will be prompted to activate via the Internet. Ensure that you are connected, then click .

- or -

For **non-internet activation licenses** (i.e., created **with** a customer key), you will be prompted simply to activate (without a required internet connection). Click .

8. You will receive a message that activation was successful, and all the relevant details of the license (expiration date, maximum number of users for platform components, etc.) will be automatically populated



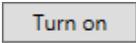
9. Click the  button

CHAPTER 4: Enabling the Kryon Credentials Vault

The Kryon Credentials Vault provides secure storage for the usernames and passwords used by robots. The credentials are stored using a 2-phase encryption mechanism, which allows only Kryon clients to retrieve and decrypt the data and enter the credentials when required.

When the Credentials Vault is enabled, the credentials themselves are managed through Kryon Console and/or Kryon Studio. For complete details, see the Credentials chapter of the *Kryon Console User Guide*.

To enable the Kryon Credentials Vault:

1. In the [Menu Pane](#), click **Companies and Users**
2. In the [Entities Pane](#), select the company for which you want to enable the Credentials Vault
3. In the [Properties Pane](#), select the **Credentials Vault** tab
4. Click the  button
5. Choose whether access to the Credentials Vault (from Console and Studio) should be password protected
 - If so, click the **Set Password** link to set the Credentials Vault password
6. Click the  button

CHAPTER 5: Managing Users

Each company in the Kryon RPA environment has its own authorized users. The company's [Kryon RPA license](#) determines the maximum number of authorized users for each platform component.

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Creating Users

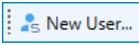
RPA Authentication Method

At the time of Kryon Application Server installation, one of two authentication methods is selected:

- **Domain Authentication** – client applications (including unattended/attended robots, Studio, and Console) will connect to the Kryon Application Server using network credentials defined in Windows Active Directory. When this method is used, users are automatically created according to domain rules the first time they access a Kryon client application.
 - When using the Domain Authentication method, users can also be [created manually](#) through Kryon Admin, but this is not generally required.
- **Username & Password Authentication** – client applications will connect to the Kryon Application Server using usernames/passwords configured specifically for the RPA platform and defined in Kryon Admin.

Creating a new user

To create a new user:

1. In the [Menu Pane](#), click **Companies and Users**
2. In the [Entities Pane](#), select the company for which you are creating a user
3. In the [Properties Pane](#), select the **Users** tab
4. Click the  button
5. Enter the required information in the [New User dialog](#) then click **Save**

New User dialog

New User

Username: ①

Full Name: ②

Email address: ②

Status: Active ③

User role: Attended Robot ④
 Unattended Robot ④
 Studio Developer ④
 Console User ④

New password: ⑤

Confirm new password: ⑤

Options

User must change password at next login ⑥
 The user must log out and then log in again for the change to take effect.

- ① Enter a username
- ② (optional) Enter the user's full name and email address
- ③ Select whether the new user will be active
NOTE: Generally, the default value of `Active` will be applicable to new users. However, the user status can be changed at any time.
- ④ Assign the user one or more [user roles](#)
- ⑤ Enter and confirm a user password
 - Password-related fields are not applicable to [Domain Authentication](#) and will not be visible when this [authentication method](#) is used
 - Passwords require a minimum of 8 characters and must include at least 2 of the following: uppercase letters, lowercase letters, numbers, and symbols
 - To create a random-generated password, click the button
 - To copy the password to the Windows clipboard, click the  icon



Select whether the user will be required to change the password the next time he/she logs in

NOTE: This is often appropriate for human users, but not for unattended robots

User Roles

Each user of the Kryon RPA platform is assigned one or more user roles. These roles determine which platform component(s) each user is able to access.

The screenshot shows a user profile configuration window for 'FDRoosevelt'. It includes fields for Username (FDRoosevelt), Full Name, and Email address. The Status is set to 'Active'. Under 'User role', there are four checkboxes: 'Attended Robot' (unchecked), 'Unattended Robot' (unchecked), 'Studio Developer' (checked), and 'Console User' (checked). A 'Supports API calls' checkbox is also checked and appears below the other roles. At the bottom, there are buttons for 'Reset Password', 'Save', and 'Close'.

| User Role | Description |
|-------------------------|--|
| Attended Robot | A human end-user who will run automations on his/her desktop via the Kryon Robot client |
| Unattended Robot | A virtual user that will run automations without human intervention via the Kryon Robot client (generally installed on a virtual machine) |
| Studio Developer | An automation developer who will record/create/edit automations in Kryon Studio |
| Console User | An RPA administrator who will schedule and manage unattended robot tasks using Kryon Console NOTE: This could also be a user created in order to schedule and manage tasks via API call. Assign this type of user the Console User role, then tick the Supports API calls checkbox that appears underneath. |

Importing Users

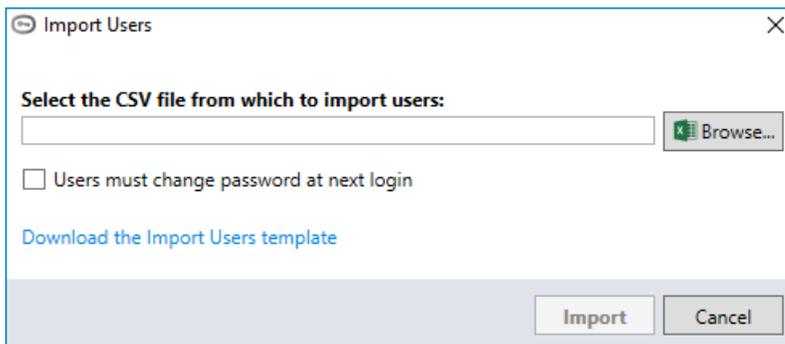
To make it easy to create a large number of users at one time, Kryon Admin allows you to import them from a CSV file. Doing so is a 3-stage process:

1. Download the **Import Users** file template
2. Fill in the template with user information
3. Import the file

Download the Import Users file template

To download the **Import Users** file template:

1. Go to **Companies and Users** and select the **General** tab
2. Click the  button
3. In the dialog box, click the link to **Download the Import Users template** and select a download location



Import the file

To import the completed Import Users file:

1. Go to **Companies and Users** and select the **General** tab
2. Click the  button
3. In the dialog box, click the **Browse** button and navigate to the **Import Users** CSV file you created
4. Tick the checkbox if you want to require users to change their passwords the next time they log in

NOTE: This is often appropriate for human users, but not for unattended robots
5. Click the **Import** button

The users listed in the file will be created.

CHAPTER 6: Managing Applications

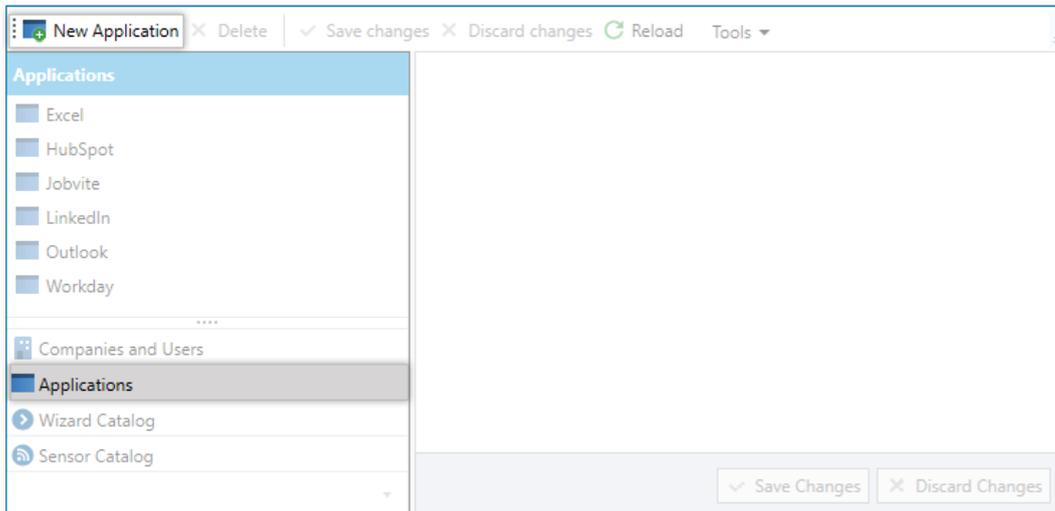
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Adding an Application

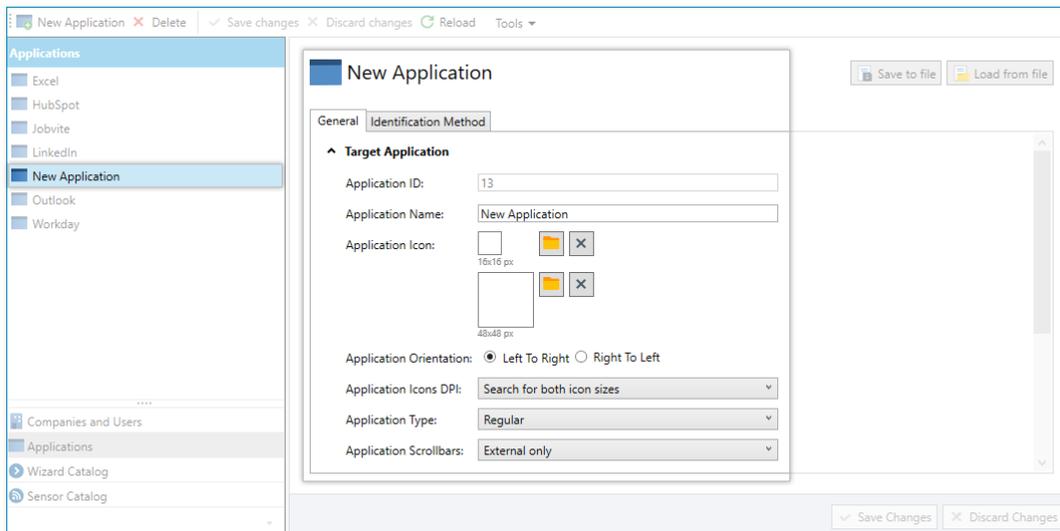
Any application that is used in an automation must first be defined in Kryon Admin. To add an application:

1. In the **Menu Pane**, click **Applications**
2. From the toolbar, click the **New Application** button



3. An application called **New Application** is created in the **Entities Pane**

The new application is automatically selected, and its properties appear in the **Properties Pane**, with the **General** tab active



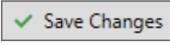
4. Enter a name for the application on the **General** tab



NOTE

Additional general properties

There are many properties available on the General tab. However, when adding an application, the only **General** tab field that is required is the **Application Name**.

5. Define the application's [identification methods](#) on the **Identification Methods** tab
6. When you have finished defining the application's properties, click the  button

Application Identification Methods

Application **Identification Methods** are the ways in which the Kryon RPA Platform identifies the application being used. In order to add an application, you must define **at least one** identification method.



NOTE

One or more? AND or OR?

There are numerous methods by which an application can be identified, and it is possible to specify more than one for each application. Additionally, within each method, one or more conditions can be specified.

- If more than one method is specified, **ALL** the specified methods must be satisfied in order for the application to be properly identified (i.e., each method is separated by an **AND**)
- If more than one condition within a single method is specified, **ONLY ONE** of the conditions must be met in order for the method to be satisfied (i.e., each condition is separated by an **OR**)

Adding identification methods and conditions

The screenshot shows the 'New Application' dialog box with the 'Identification Method' tab selected. A list of identification methods is shown with checkboxes. The 'Process name' checkbox is checked. Below it, a dropdown menu is set to 'Equals' and an empty text input field is provided for the condition. Blue arrows point from the labels 'Identification method' and 'Condition' to the checked checkbox and the dropdown menu respectively.

To add an identification method:

1. Tick its checkbox
2. Enter the details of the condition under that method

To add a condition under an identification method, click the  button

To remove a condition under an identification method, click the  button

Recommended identification methods

Best practice is to use one of the following identification methods (depending on whether the application is desktop- or web-based) and add [other identification methods](#) only as necessary.

Process name is the recommended identification method for desktop applications.

- In the condition, enter the application's process name as it appears in the **Windows Task Manager > Details** tab – without the .exe extension (e.g., outlook)

Application URL is the recommended identification method for web-based applications.

- To maximize the probability that the web application will be properly identified:
 - In the condition, enter the website's URL without the protocol (usually, http or https) and without the path (i.e., the section of the URL following the domain name)
 - Use an operator other than Equals (e.g., Contains, Starts With, etc.)

Additional identification methods

You can use additional identification methods either instead of or in addition to the recommended methods. These additional methods include:

- Installation registry values
- Company name
- Class name
- Application container
- Product name
- Product version
- Window caption
- Main module name
- Registry values

Exporting/Importing Application Properties

To facilitate migrating defined applications among different environments, Kryon Admin allows you to export an application's properties to an XML file and import them into the new environment.



NOTE

An application's general properties and identification methods are included when you export/import its properties.

Exporting application properties

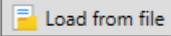
To export an application's properties:

1. In the [Menu Pane](#), click **Applications**
2. In the [Entities Pane](#), select the application whose properties you want to save
3. In the [Properties Pane](#), click the  **Save to file** button
4. Navigate to the location in which to save the file
5. Click **Save**

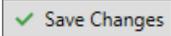
An XML file is saved to the selected location.

Importing application properties

To import an application's properties:

1. In the [Menu Pane](#), click **Applications**
2. From the toolbar, click the **New Application** button
3. In the [Properties Pane](#), click the  **Load from file** button
4. Navigate to the location of the saved XML file
5. Click **Open**

The application's general properties and identification methods are loaded into the [Properties Pane](#)

6. Click the  **Save Changes** button

CHAPTER 7: Managing Libraries

All wizards and sensors are housed on the Kryon Application Server in the wizard and sensor catalogs, respectively. Libraries are the top level in the catalog's hierarchy. Each library:

- Contains categories and subcategories, which, in turn, contain automations
- Is associated with its own set of [defined applications](#) for which automations can be recorded

Catalog structure

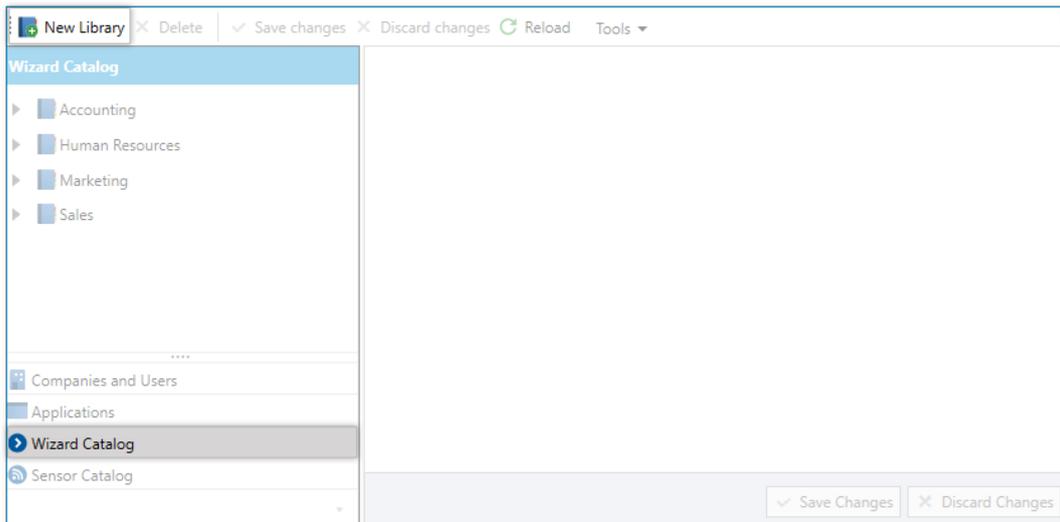
- By default, the wizard and sensor catalogs share an identical library structure
 - Libraries are [created](#) and associated with their supported applications in Kryon Admin
- The wizard and sensor catalogs have varying structure from the category level down
 - Categories and subcategories are created in Kryon Studio

For details, see the *Kryon Studio User Guide (Categories)*

Creating a library

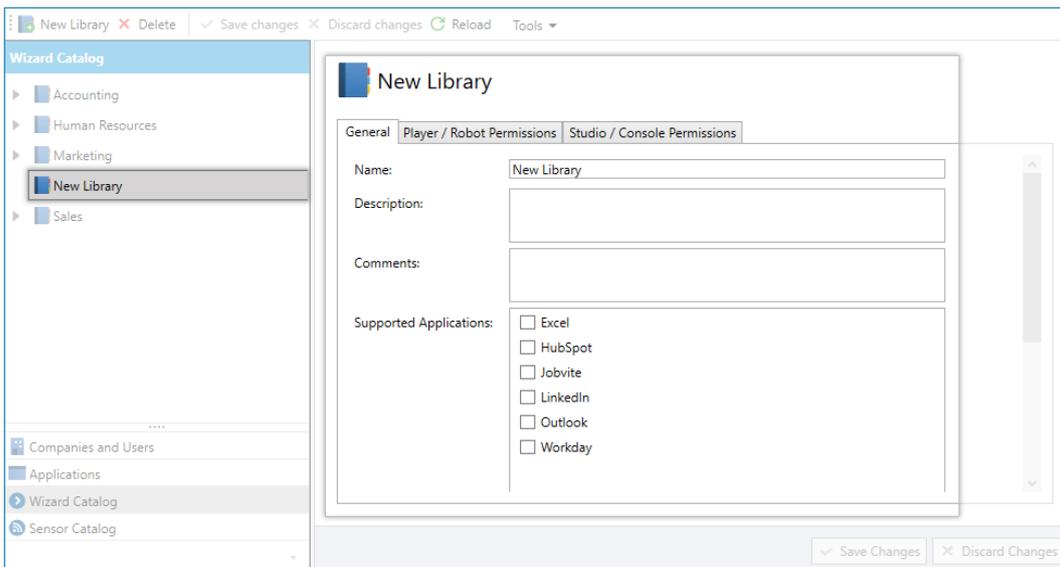
To create a library:

1. In the [Menu Pane](#), click either the **Wizard Catalog** or the **Sensor Catalog**
2. From the toolbar, click the **New Library** button



3. A library called **New Library** is created in the **Entities Pane**

The new library is automatically selected, and its properties appear in the **Properties Pane**, with the **General** tab active



4. Enter a name for the library in the **Name** field

5. In the **Supported Applications** field, check the boxes of all applications that will be used by that library's automations

- The list of supported applications includes [all previously defined applications](#)

6. Click the **Save Changes** button