software AG
Freedom as a Service

WEBMETHODS.IO EMBED USER GUIDE

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CONTENTS

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.

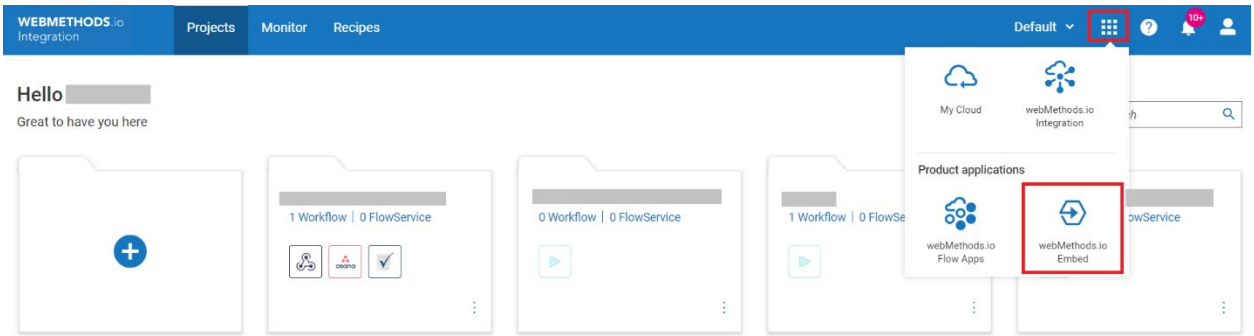
2.1 Set up webMethods.io Embed tenant

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.

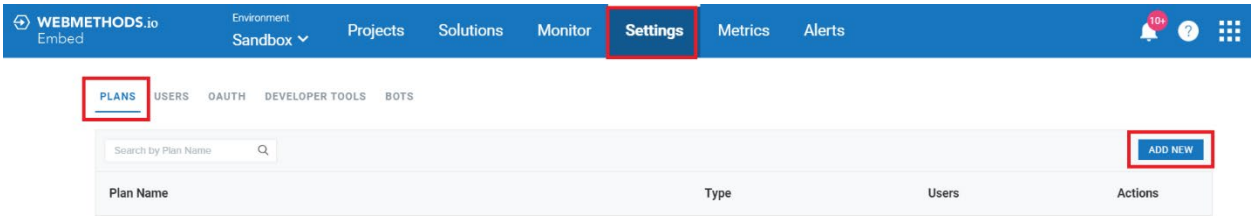


When you click on it, you will be redirected to the webMethods.io Embed admin portal. From here, you can configure the settings to integrate webMethods.io Embed with your application.

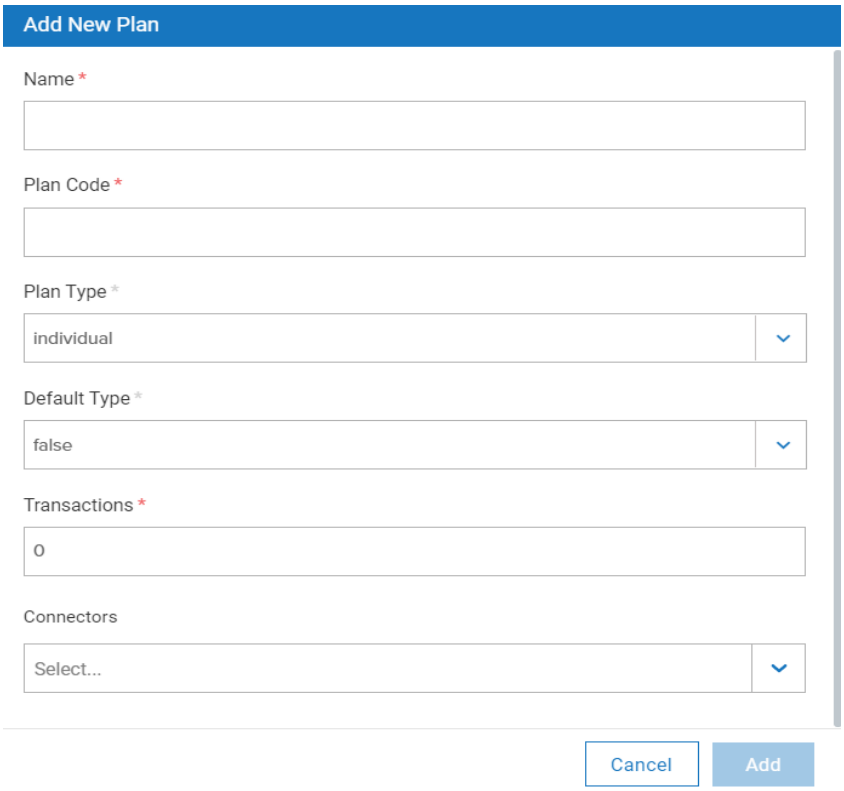
2.3 Create Default Plan in Admin Portal

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



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



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.

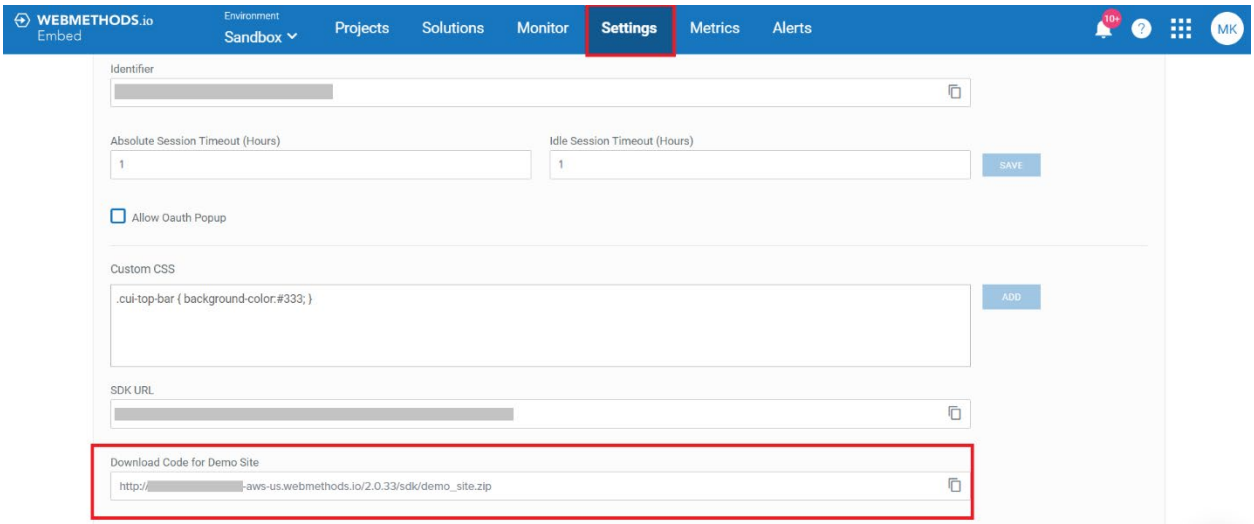
Connectors: Select the connectors you want to enable for this plan.

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.



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.

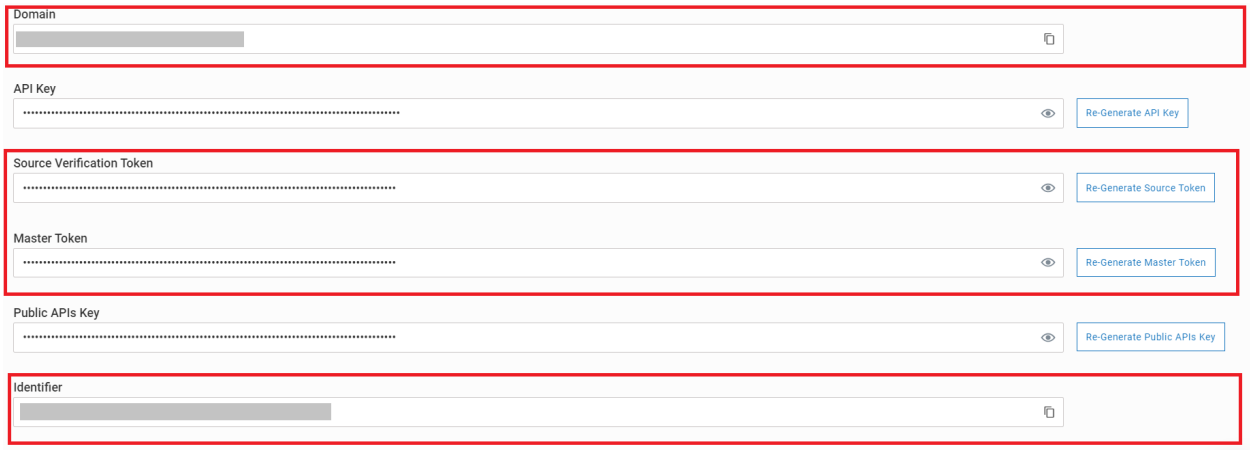
2.5 Connect Admin Portal with Demo Application

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.

```
/* ---------------- Setup following variables to initialize demo site ------------------ */

var domain = ""; /* DOMAIN VALUE */
var environment = "sandbox"//"ENVIRONMENT_VALUE"; /* sandbox or production */
var identifier = "" /* Identifier*/
var source_verfication_token = "" /* Source Verification Token */
var master_token = ""  /* Master Token */
var region = "us";

/* ----------------------------------------------------------------------------------*/

window.localStorage.setItem('domain', domain);
window.localStorage.setItem('environment', environment);
window.localStorage.setItem('region', region);

var initializationKeys = {}
initializationKeys[domain] = {}
initializationKeys[domain][environment] = {
            identifier : identifier,
            sv : source_verfication_token,
            mt : master_token
        }
```

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

- Domain
- Identifier
- Source Verification Token
- Master Token



From here, copy the Domain, Identifier, Source Verification Token, and Master Token keys and replace them with the corresponding placeholder values.

Set the value for **environment** key to required environment (Sandbox/Production) and the **region** key to the region associated with your tenant.

```
/* ---------------- Setup following variables to initialize demo site ------------------ */

var domain = "Acme"; /* DOMAIN VALUE */
var environment = "sandbox"//"ENVIRONMENT_VALUE"; /* sandbox or production */
var identifier = "123hfejffl6845ng" /* Identifier*/
var source_verfication_token = "dhskajlfk5y95049rf67056df546954edekflrv" /* Source Verification Token */
var master_token = "wrcjwc68507984khlgasdxkldj1463527634gfgmvrkg"  /* Master Token */
var region = "us";

/* ----------------------------------------------------------------------------------------*/
```

Next, navigate to the ‘demo_site’ folder and open the **index.js** file in the editor of your choice.

```
// /* --------------- Configure following varible to initialize demo site ------------*/
var API_KEY = "API_KEY"; /* API Key */;
  // username password for basic auth
var basicAuthCred = {
  username : "<USERNAME>",
  password : "<PASS>"
}
var userLoginPassword = "<PASSWORD>" /* Password for demo site login */
// /* ----------------------------------------------------------------------------------*/


const express = require('express');
const path = require('path');
const fs = require('fs');
let app = express();
var bodyParser = require('body-parser'),
    jwt = require('jsonwebtoken'),
    basicAuth = require('express-basic-auth');
```

Copy the ‘API Key’ from the Embed Admin Portal and replace it with the corresponding placeholder text value of the **API Key** key.

Under the **basicAuthCred** object, specify the basic authentication credentials for your demo application.

Using the userLoginPassword key, set the login password for your demo application.

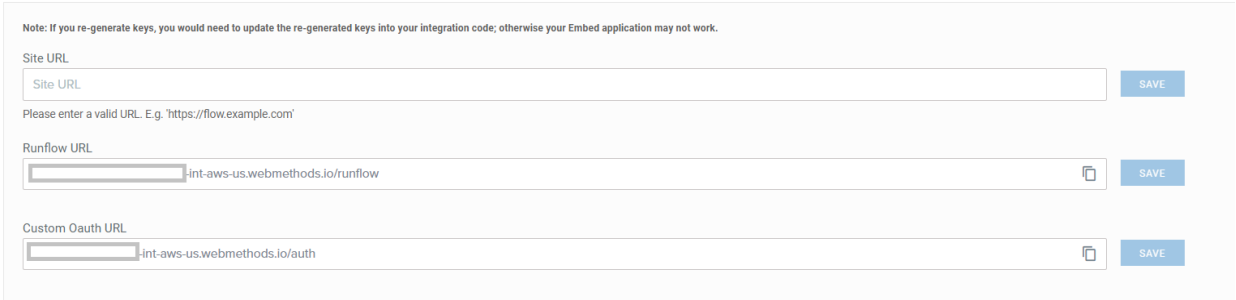

```
// /* --------------- Configure following varible to initialize demo site ------------*/

var API_KEY = "261723948fgfaddcjdkecfk658907lsqtsdhyl435dflg"; /* API Key */;
  // username password for basic auth
var basicAuthCred = {
  username : "acme",
  password : "samplepassword"
}
var userLoginPassword = "loginpassword@123" /* Password for demo site login */

// /* ------------------------------------------------------------------------------*/
```

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.



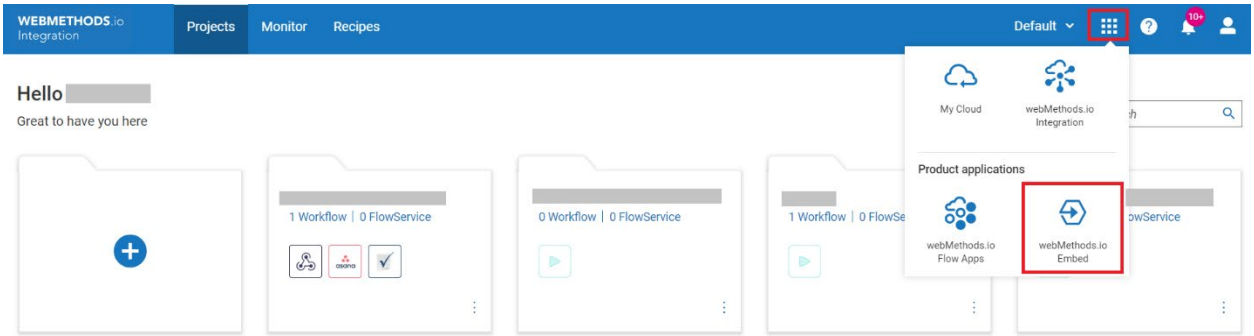
With this, your application is successfully integrated with webMethods.io Embed. You can now start creating solutions and publishing them on the sandbox and production environments of your application.

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 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.

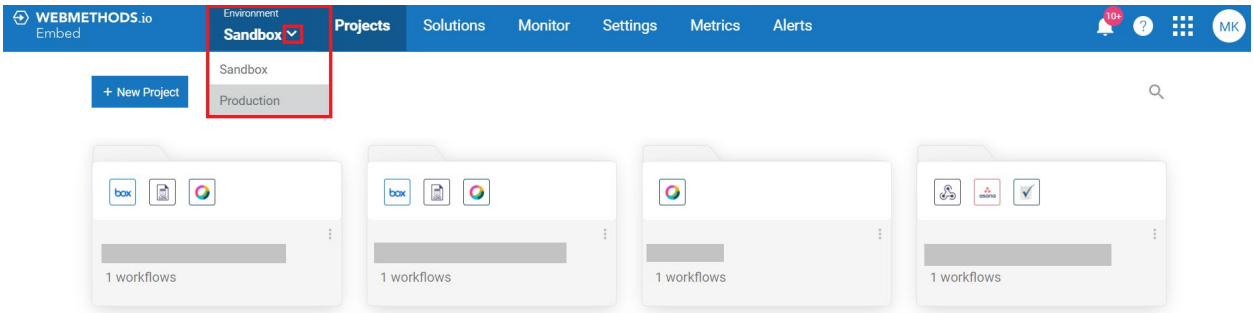
At the top of this dashboard, you can see seven main menus:

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.



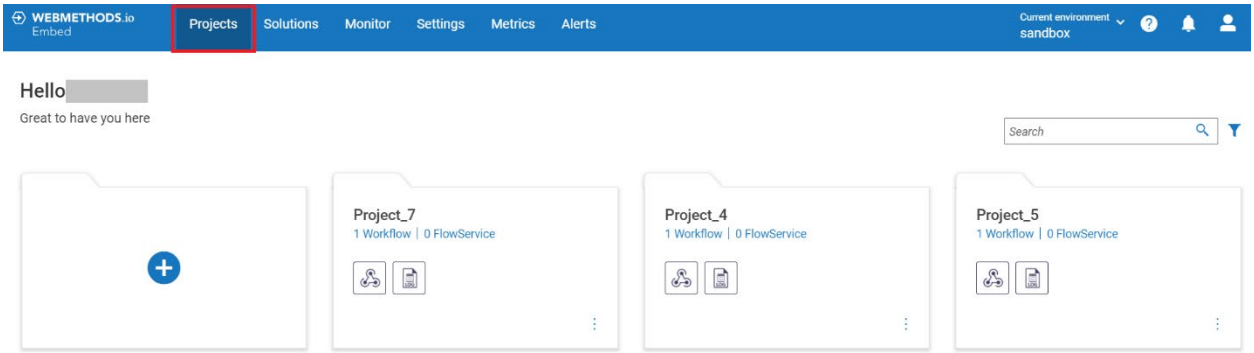
- Sandbox: Used to test your Embed Admin configurations
- Production: Used to manage Embed Admin settings for the live site

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.

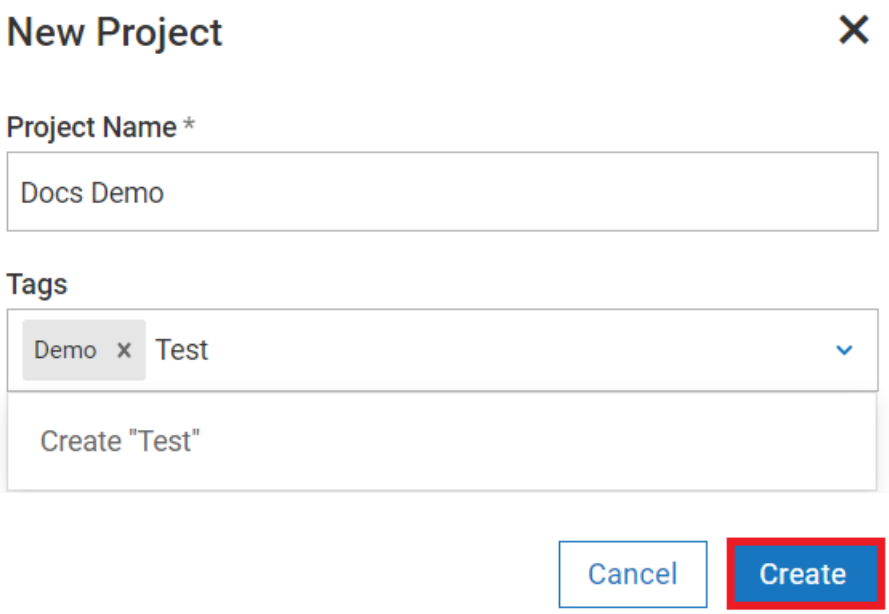
The **Projects** menu lets you do the following:

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

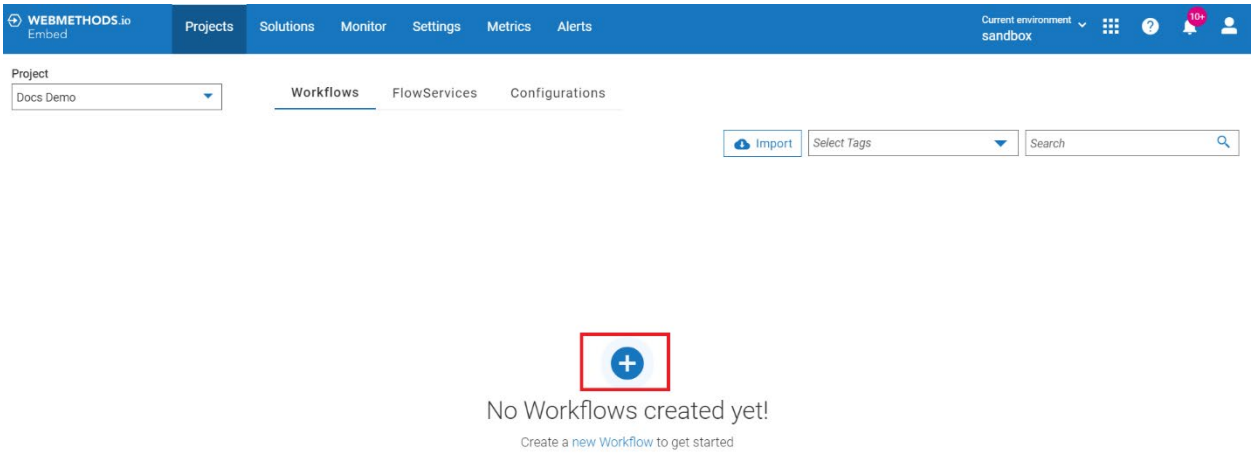


3.2.1 Creating or updating projects

To create a new project, click on the '+ New Project' button. You will be prompted to provide a name for the project and add/select tag(s) you want to associate with the project.



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



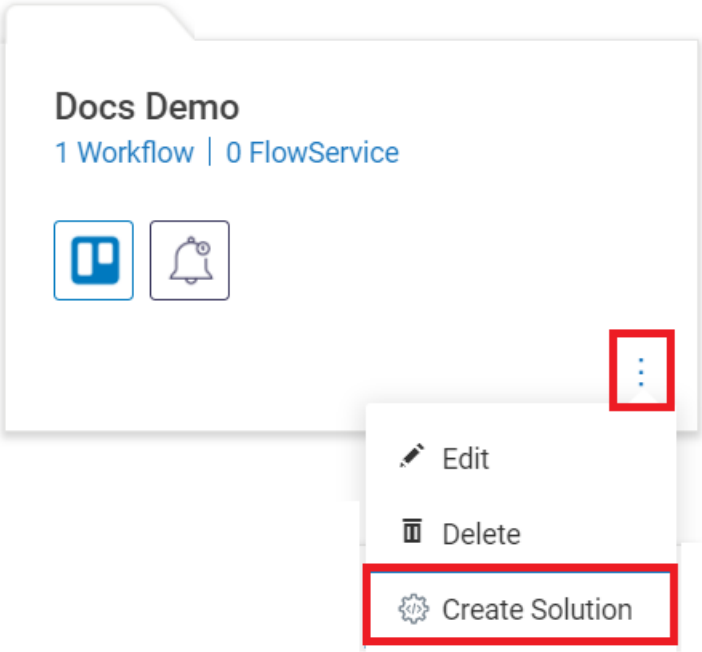
You can now start creating Workflows or FlowServices within this project and can make changes to the pre-existing project workflows. All the configurations such as certificates, triggers, webhooks, parameters, associated with your project workflows and FlowServices will be listed under the Configurations tab.

3.2.2 Creating and publishing solutions

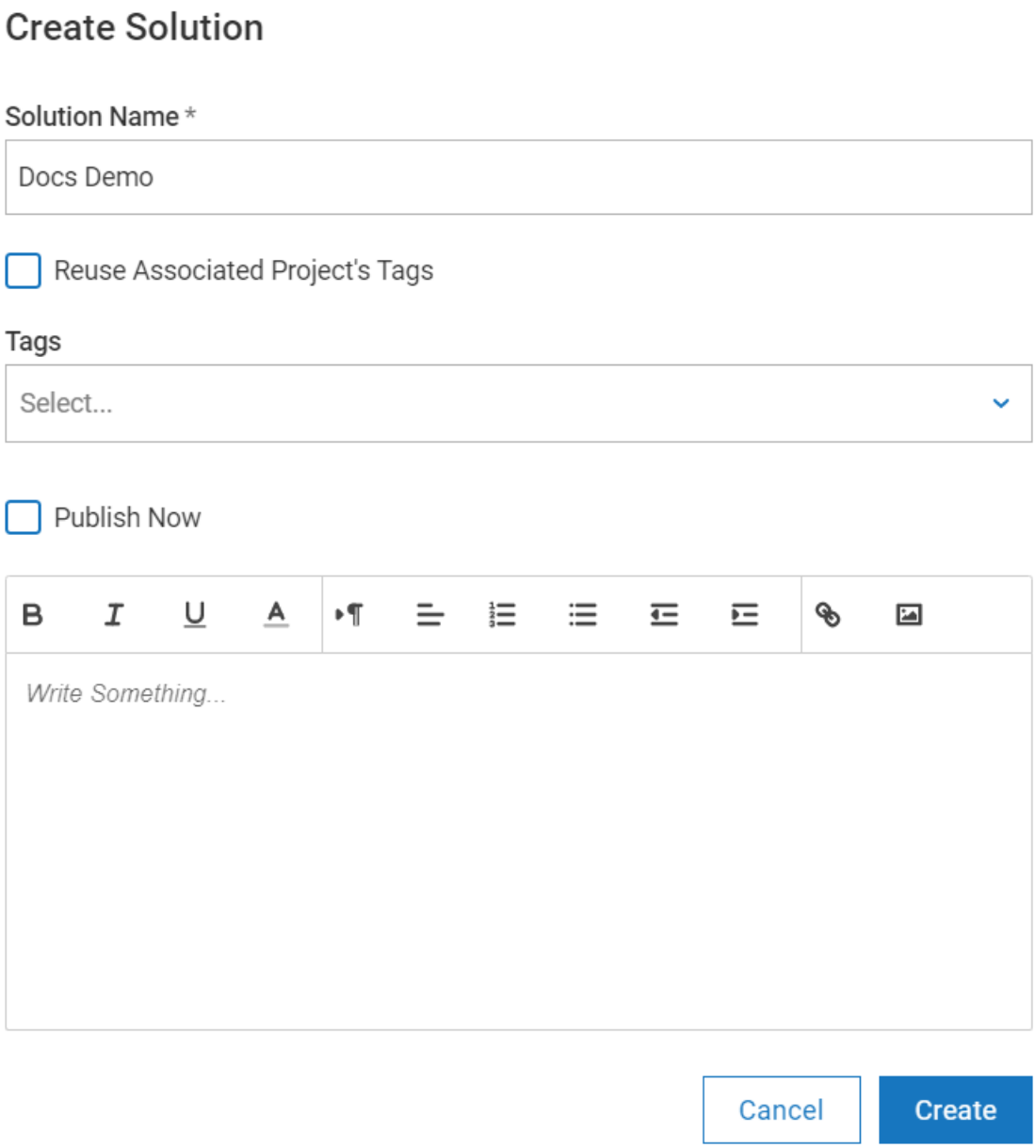
You can submit your existing projects as solutions to webMethods.io Embed Admin and publish those solutions on your app to enable them for your users.

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.

Note: Only projects containing workflows with either a webhook or service trigger can be published as a solution.

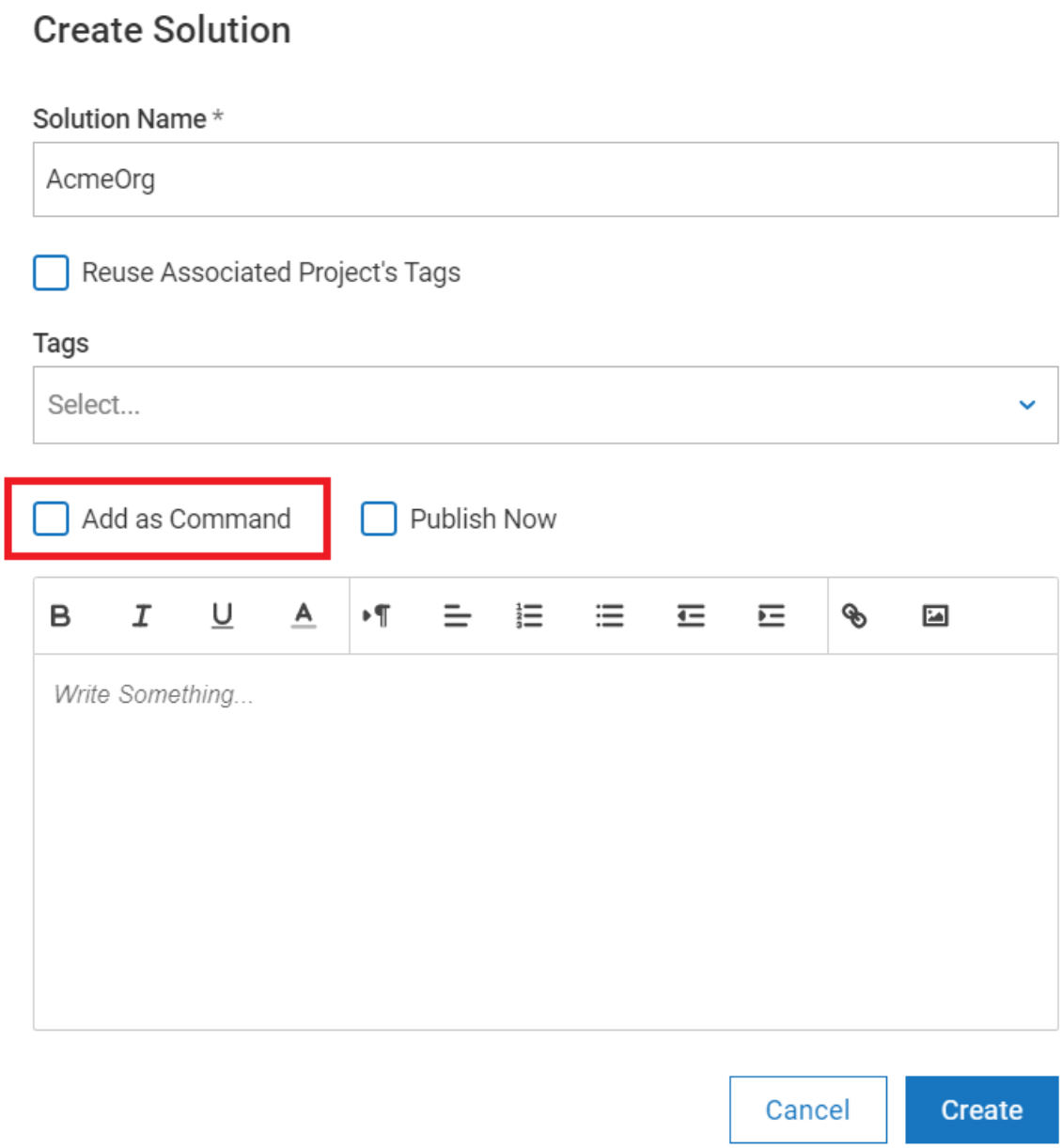


A 'Create Solution' dialogue box will appear on screen.



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.

Reuse Associated Project's Tags: Select this checkbox if you want to preserve the tags assigned to this project and reuse them for the solution.

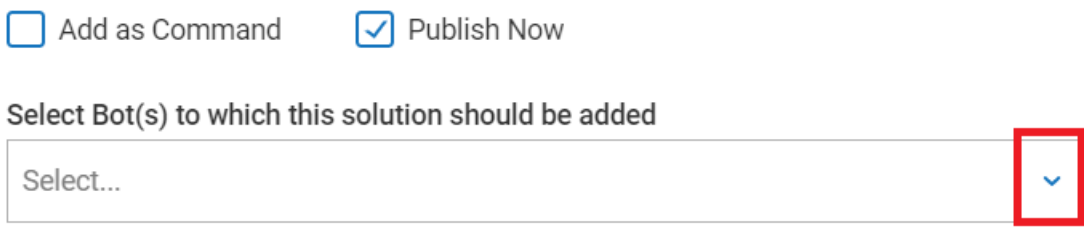
Tags: Add/select tag(s) you want to assign to this solution.

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.

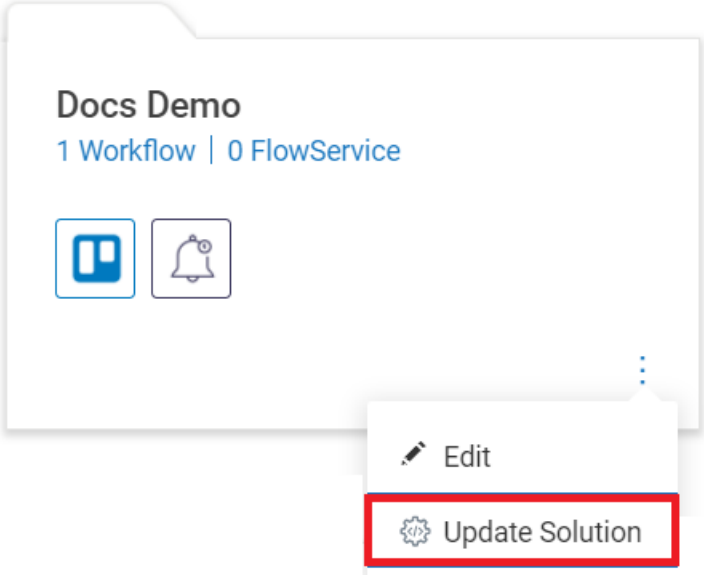


Description: Provide a short description for the bot.

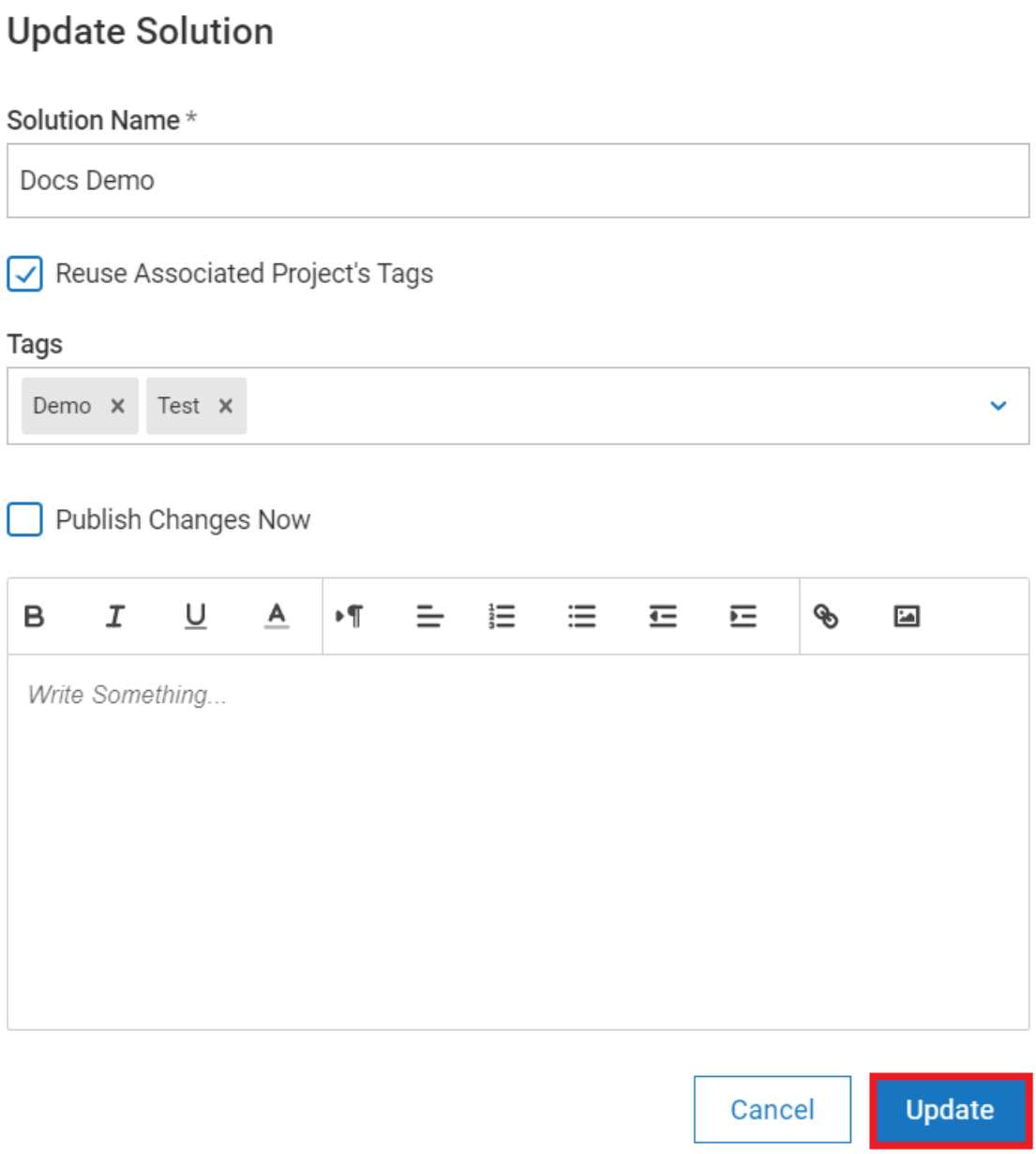
Once this is done, click CREATE. Based on the inputs provided, this will either create a solution/command or create and publish the solution/command.

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.



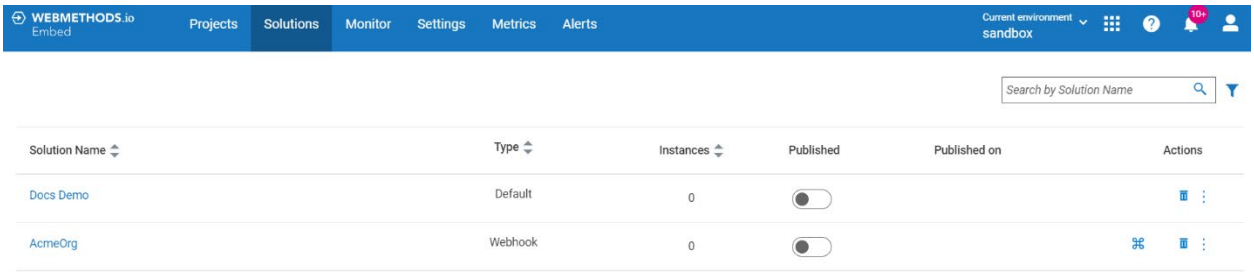
A new dialogue box appears where you can make relevant updates to your solution.



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

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:

- **Solution Name:** Name of the solution
- **Type:** Type of the solution (Default/Webhook/Command). (This field will not be visible in the subtenants)
- **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 solutions.
- **Published on:** The date on which the solution was published.
- **Actions:** Contains action controls to manage solutions. (Only certain actions will be available to subtenants for their custom solutions.
    - **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
    - **Deploy to Production:** Deploy the associated solution on to the production environment of your website/application.
    - **Delete Solution:** Delete the associated solution from Embed Admin.
    - **Edit Solution Schema**: Edit the solution schema.
    - **Add Tags:** Add tags to the solution.

> **Note**: Under subtenants, none of the action controls will be visible for master tenant solutions. Deploy to Production, Delete Solution, Edit Solution Schema, and Add Tags action controls will be visible only for the solutions created under the subtenant.

You can also use the search field located at the top-right corner of the page to search solutions by their names or filter out solutions using tag(s) by clicking the filter icon.

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.

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.

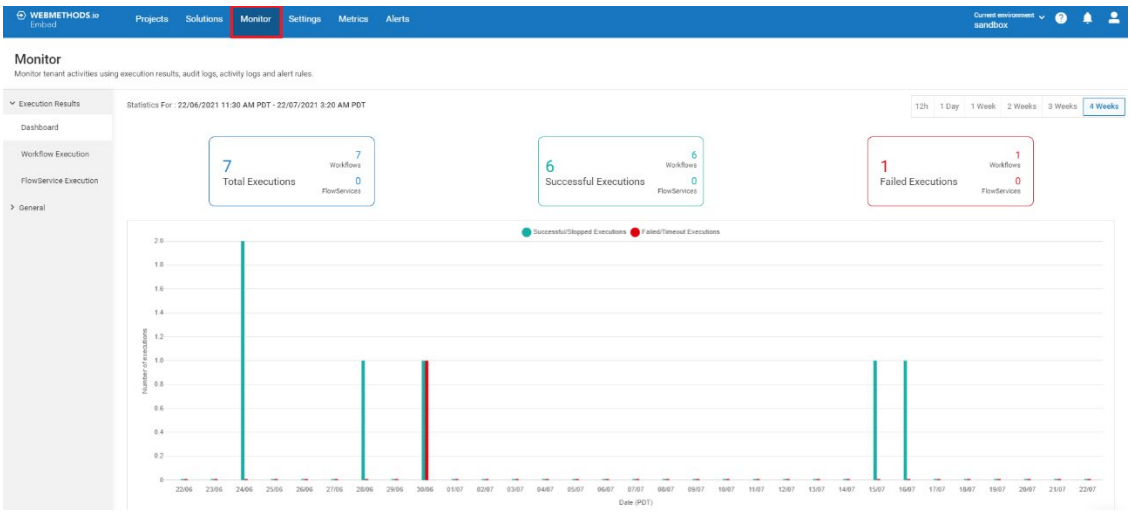
This page contains the following columns:

- **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.

3.4 Monitor

The 'Monitor' menu lets you track and monitor the overall Workflow and FlowService execution status, and user activities of your Embed Admin portal tenant. The Monitor screen has two tabs:

- Execution Results
- General



3.4.1 Execution Results

The Execution Results tab provides a quick overview of the statistics associated with the Workflow executions and FlowService executions (if enabled) along with their respective execution logs.

Let's understand the options available under Execution Results.

3.4.1.1 Dashboard

Note: This option will only be visible for tenants where FlowServices feature is enabled.

The Dashboard option offers you a consolidated view of all Workflow and FlowService execution status for the selected time period along with a graphical representation for the same.

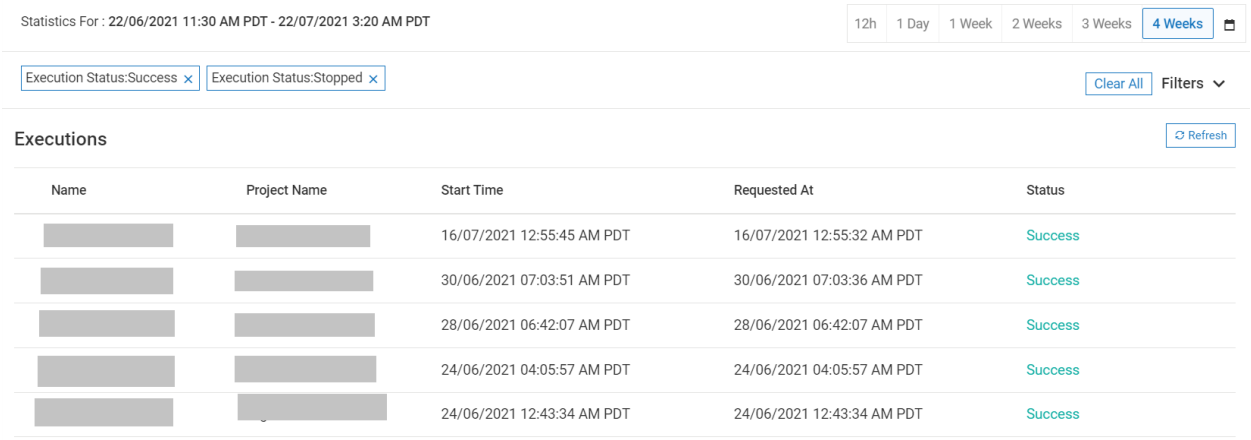
You can fetch the execution data for a specific duration by selecting the relevant time frame option given on the top-right corner of the screen.

- 12h: Fetch execution data for last 12 hours from the current time
- 1 Day: Fetch execution data for the entire previous day as well as the current time of the present day

- 1 Week: Fetch execution data for the previous week as well as the current time of the present day
- 2 Weeks: Fetch execution data for the last two weeks as well as the current time of the present day
- 3 Weeks: Fetch execution data for the last three weeks as well as the current time of the present day
- 4 Weeks: Fetch execution data for the last four weeks as well as the current time of the present day

You can also view the detailed execution logs for each successful/failed Workflow and FlowService by clicking on the relevant figures as shown below:

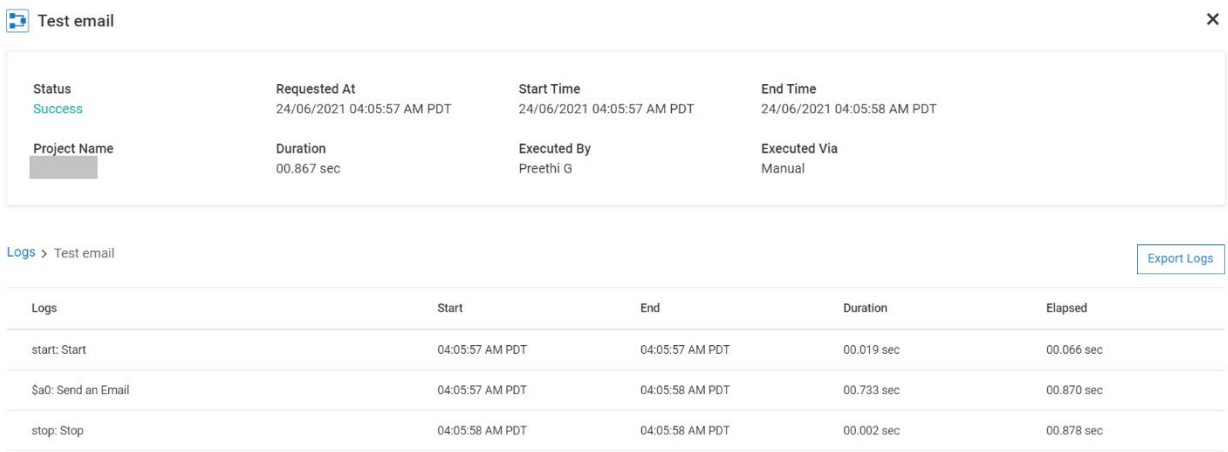
This will take you to a new screen where you can click the relevant Workflow or FlowService name to view the detailed execution log associated with it.



3.4.1.2 Workflow Execution

The Workflow Execution option lets you view and monitor workflow execution-related data in a detailed graphical format.

You can click on the workflow name to view the detailed execution information of a workflow.



Additionally, you can download the workflow execution logs by clicking the **Export Logs** button.

3.4.1.3 FlowService Execution

The FlowService Execution option lets you view and monitor FlowService execution-related data in a detailed graphical format.

Note: This option will only be visible for tenants where FlowServices feature is enabled.

Just like Workflow Execution panel, here you can click the name of the executed FlowService to view the detailed execution logs associated with it.

Additionally, you can download the FlowService execution logs by clicking the **Download Logs** button.

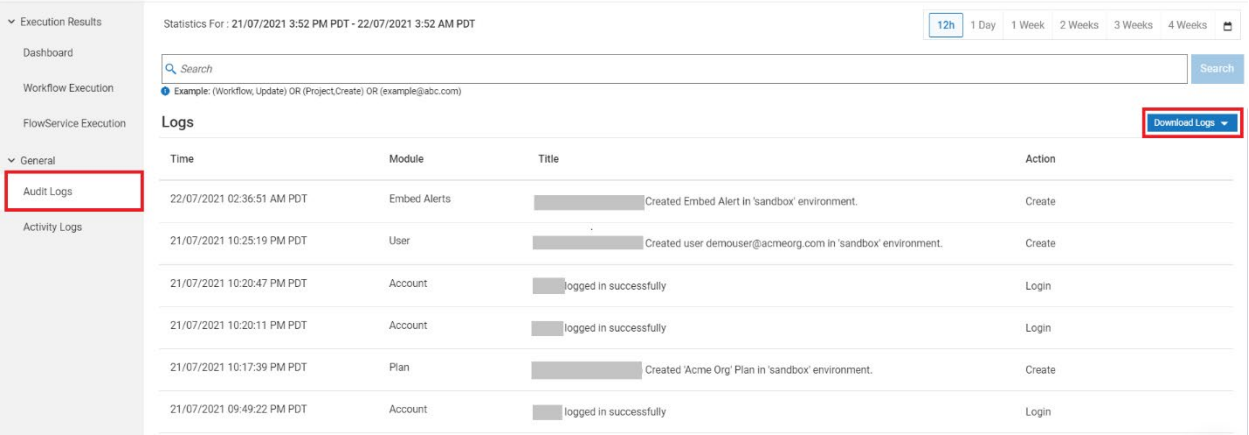
3.4.2 General

The General tab allows you to view, track, and monitor your embed tenant activities through the Audit Logs and view the current month's transaction usage statistics for your transaction-based tenants. It has following options:

- Audit Logs
- Activity Logs

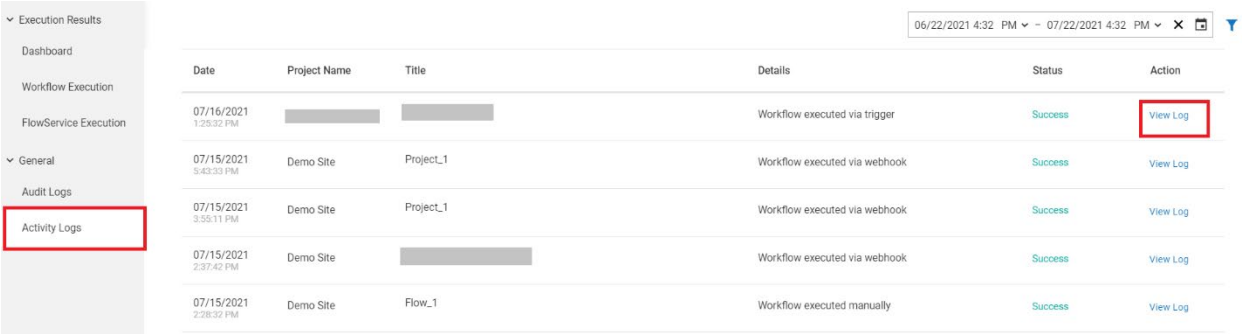
3.4.2.1 Audit Logs

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 time.

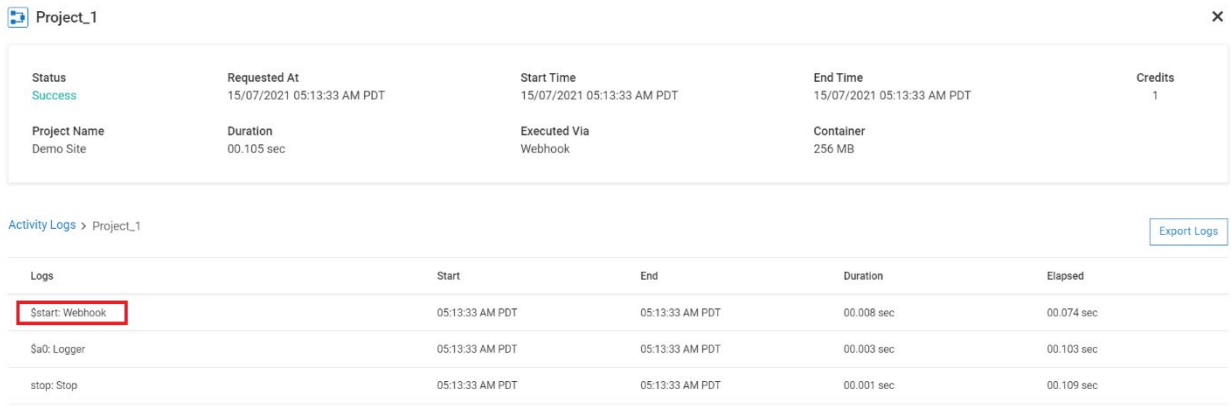


3.4.2.2 Activity logs

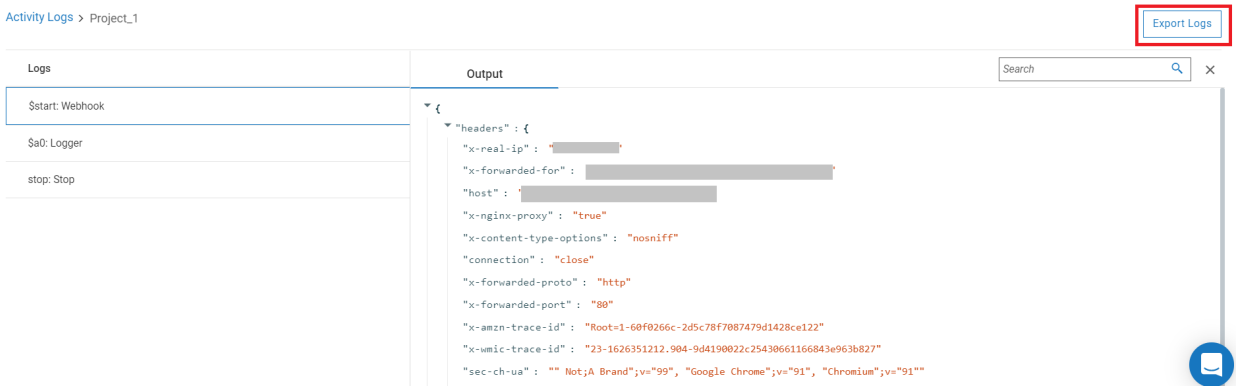
The **Activity Logs** tab lets you view the sequence of all the activities related to the workflows and FlowServices of your account. The log records include details such as the timestamp, project name, title, execution details, execution status, as well as an option to view the detailed log.



To view log associated with any workflow or FlowService, click relevant the **View Log** button.



Here, you can click the 'Webhook/Trigger Payload' key to view the webhook/trigger payload used in the workflow.



You can also export the execution logs of a specific workflow, by clicking the **Export Logs** button.

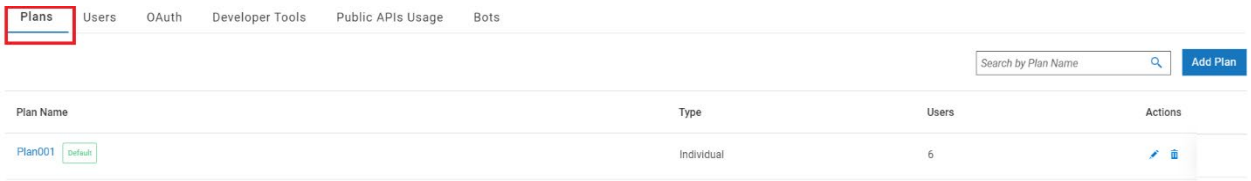
3.5 Settings

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.

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.

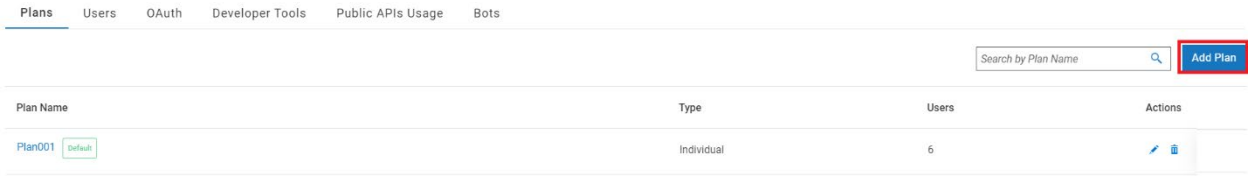
For example, suppose a Group plan, 'Plan 2' has a transaction limit of 200. When you assign this plan to 5 users, all of them can jointly execute up to 200 transactions.

Using 'PLANS' tab you can create multiple 'Group' plans.

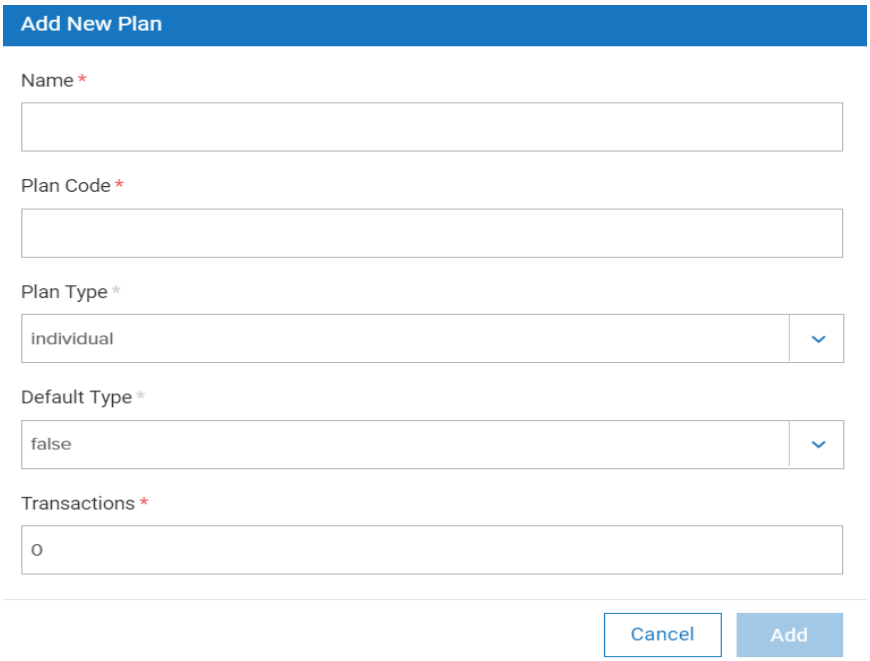
3.5.1.1 Adding new plans

To add a new plan, do the following:

1. Click on the **Add Plan** 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.

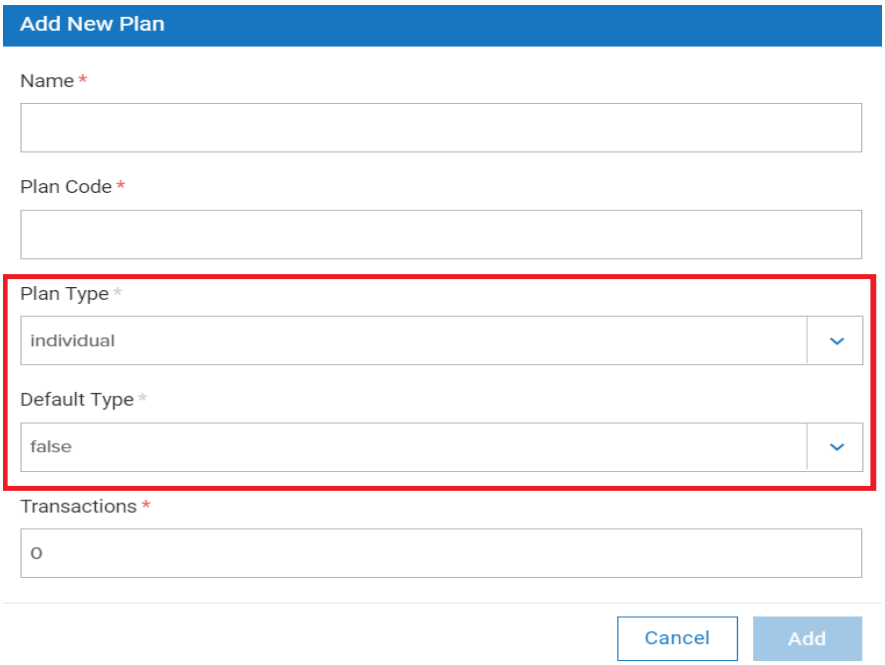
Plan Type: Select the type of plan ('individual' or 'group') you want to create.

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.

Limitation Type: Select the limitation type you want to associate with the plan.

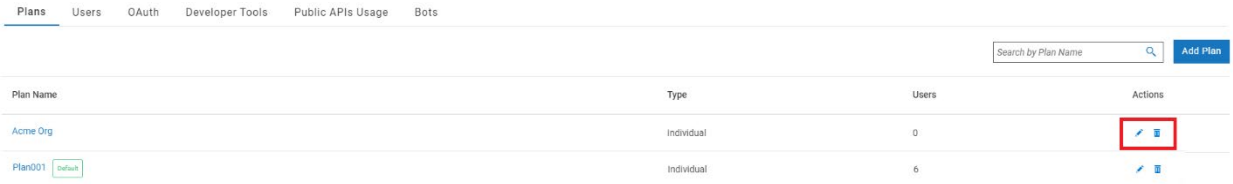
- If you set **Solutions** as the limitation type, you will need to select the solution(s) you want to make available under this plan in the **Solutions** field that appears.
- If you set **Solution Tags** as the limitation type, you will need to select the solution tag(s) in the **Solution Tags** field that appears. All the solutions associated with the selected solution tag(s) will be available under this plan.
- If you select Connectors as the limitation type, you will need to select the connector(s) you want to make available under this plan in the **Connectors** field that appears.



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:

- **Plan 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/solutions 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.

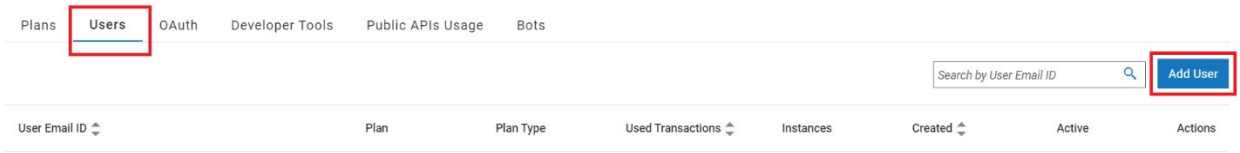
Click on the 'Edit' or 'Delete' options to modify or delete the plan from Embed Admin.

3.5.2 Users

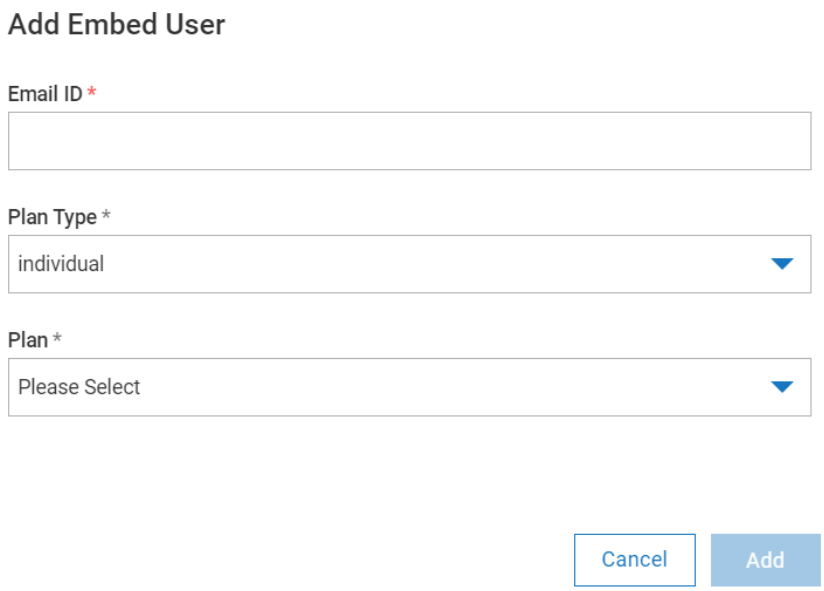
You can add, view and manage users of your application using the 'USERS' tab. To do so, navigate to 'Settings > USERS'.

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.



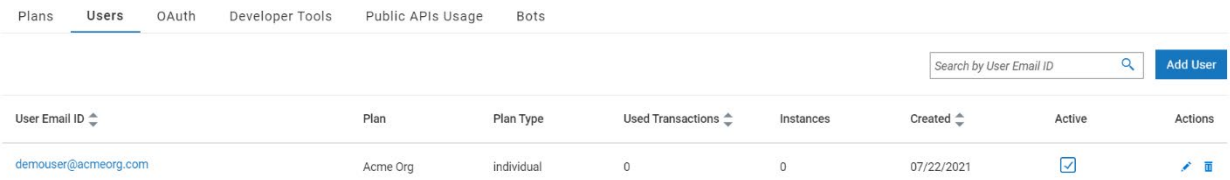
A new window will appear on screen, where you will be prompted to enter the following details:



- **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.

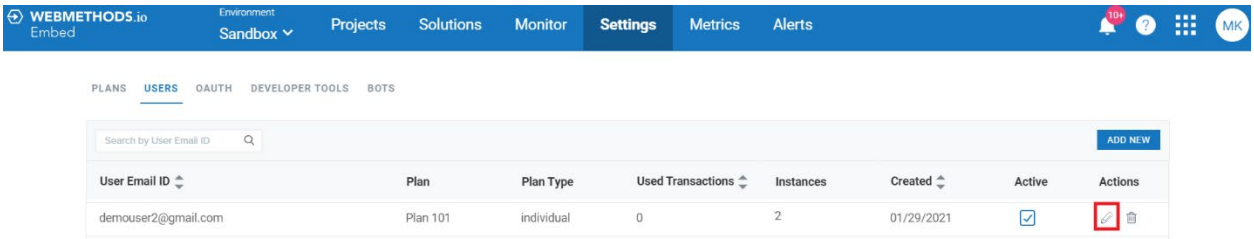
This will add the user to the list of Embed users. Now when you navigate to the USERS screen, you will see the following details associated with the added user.



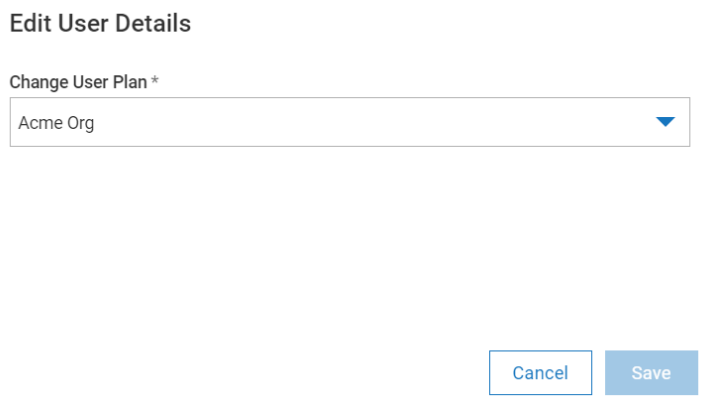
- **User Email ID:** Email address of the user.
- **Plan:** Plan assigned to the user.
- **Plan Type:** Type of plan (individual/group) assigned to the user.
- **Used Transactions:** Total number of transactions used by the user.
- **Instances:** Number of instances associated with the user.
- **Created:** 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 deployments, triggers, authorizations will also be permanently deleted from the Embed Admin portal.

3.5.2.2 Updating user plan

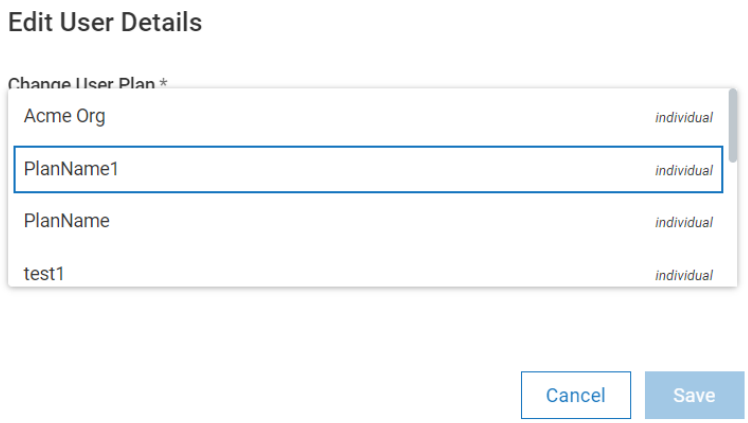
You can also update the plan assigned to a user at any time. To do so, click on the 'USERS' tab listed under the 'Settings' menu. You will see a list of all users of your application. Locate the user whose plan you want to change and click on the 'Edit' icon listed against the user's name.



A new window will appear on screen.



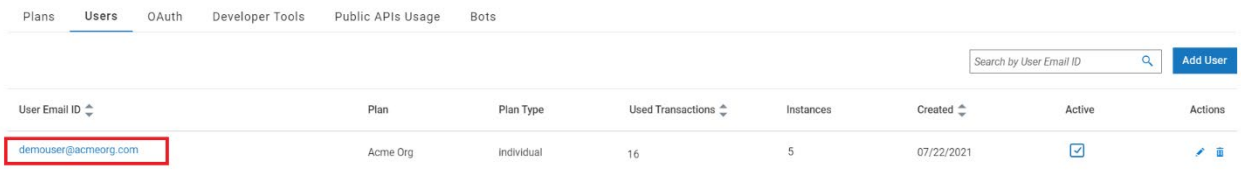
Select the plan you want to assign to the user from the **Change User Plan** drop-down list and click **Save**.



This will change the user's current plan.

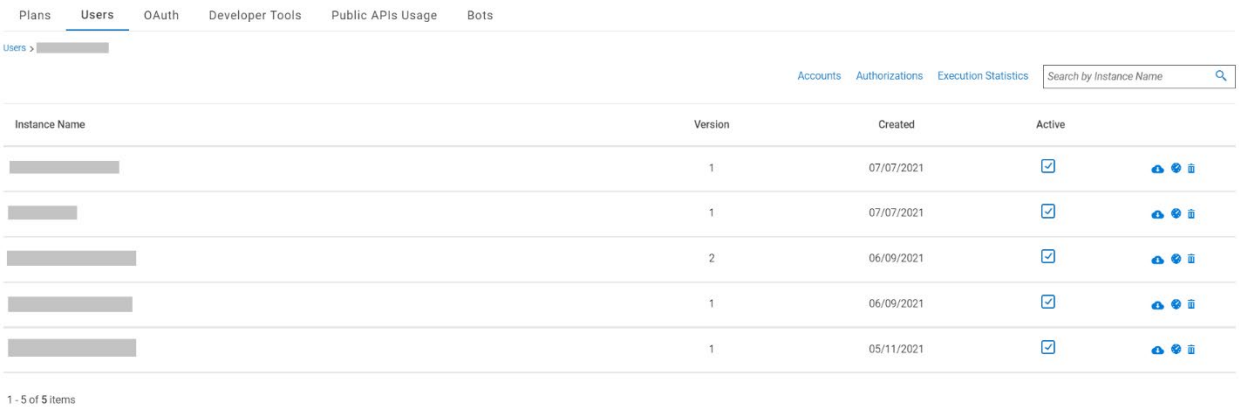
3.5.2.3 Managing user instances

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 can see the details such as user instances, their versions, status (active/inactive), and controls to perform operations on the instance.

Apart from this, you will also see three tabs namely, **Accounts, Authorizations,** and **Execution Statistics**. We will learn more about them later in this section.

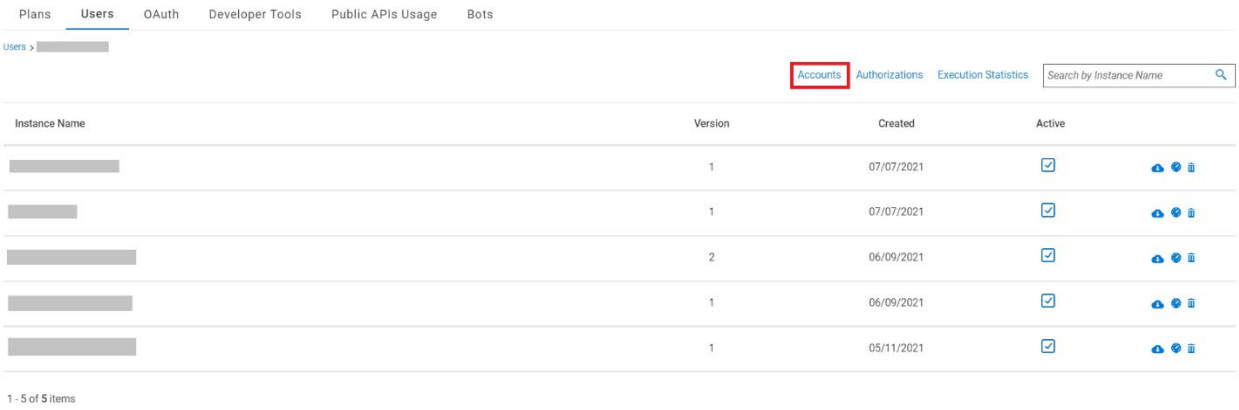


- **Instance Name:** Name of the user instance
- **Version:** Version of the instance
- **Created:** Date on which the instance was created
- **Active:** Activate or deactivate a user instance. If you deactivate a user instance from here, it will stay deactivated in your demo site application. This is useful in scenarios when a deployment goes in the infinite execution loop due to some reason.
  Apart from this, you can also perform below operations on the user instance by clicking the relevant icons:
  - **Export Deployment:** Download the JSON file for the selected user deployment as a backup to your local machine.
  - **Show Workflow Execution Statistics:** Get the execution statistics of the selected user deployment for the specified timeframe (up to one month).
  - **Delete Instance:** Delete the selected instance.

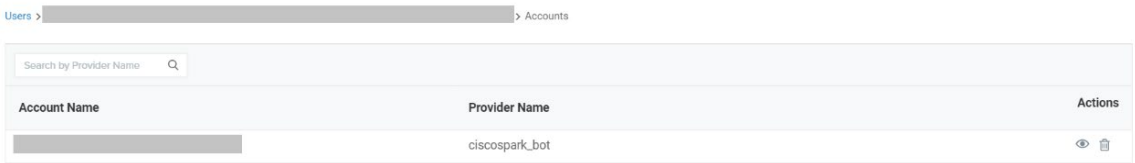
Accounts

Some connectors use connections for creating application accounts. These accounts are then used to perform actions in their associated applications on users' behalf.

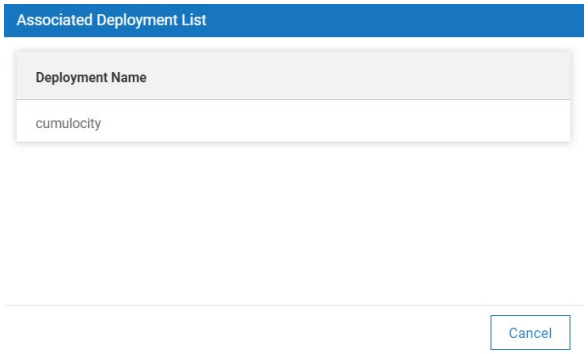
The 'Accounts' tab lists all such connector accounts that are created by the selected user. To view the user accounts, click the **Accounts** tab.



This will take you the ‘Accounts’ screen.



- **Account Name:** Name of the account
- **Provider Name:** Name of the provider
- **Actions:** Contains action controls to manage accounts
    - **View Associated Deployments:** To view the list of deployments where the selected account is being currently used.

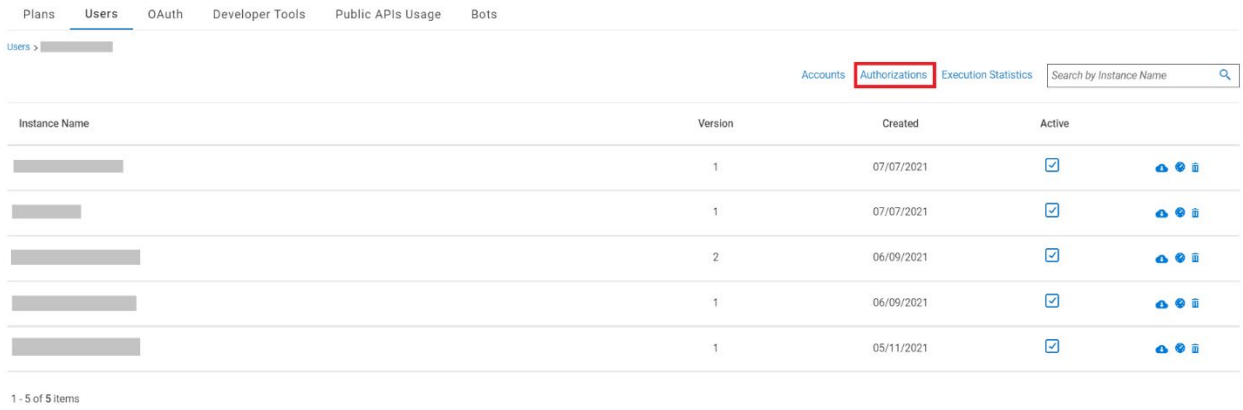


    - **Delete Account:** To delete the account. If you delete an account that is being used in a deployment, the account will be automatically disabled for that deployment In such a scenario, you will need to add another account for that deployment to execute the relevant action.

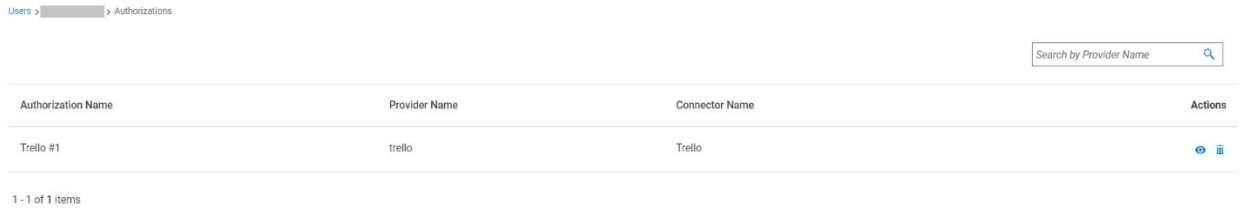
Authorizations

Some connectors use OAuth for creating application authorizations. These authorizations are then used to perform actions in their associated applications on users’ behalf.

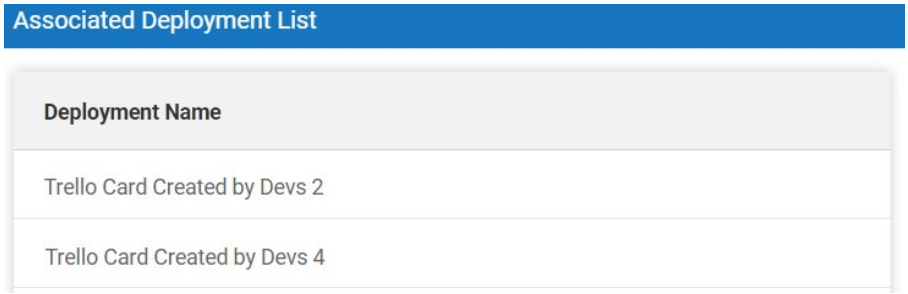
The ‘Authorizations’ tab lists all such connector authorizations that are created by the selected user. To view the user authorizations, click the ‘Authorizations’ tab.



This will take you the 'Authorizations' screen.



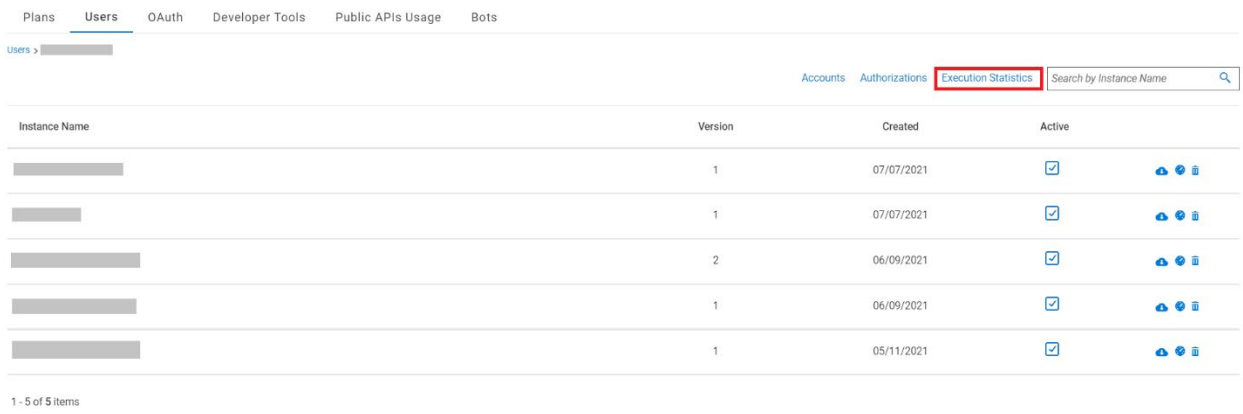
- **Authorization Name:** Name of the authorization
- **Provider Name:** Name of the provider
- **Connector Name:** Name of the connector
- **Actions:** Contains action controls to manage authorizations
    - **View Associated Deployments:** To view the list of deployments where the selected authorization is being currently used.



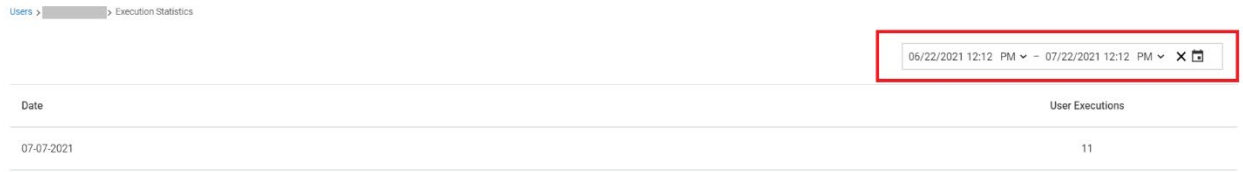
    - **Delete Authorization:** To delete the authorization. If you delete an authorization that is being used in a deployment, the authorization will be automatically disabled for that deployment. In such a scenario, you will need to add another authorization for that deployment to execute the relevant action.

Execution Statistics

This tab lets you view the execution statistics associated with the selected user (up to one month). To view user's execution statistics, click the 'Execution Statistic' tab.



This will take you the 'Execution Statistics' screen.

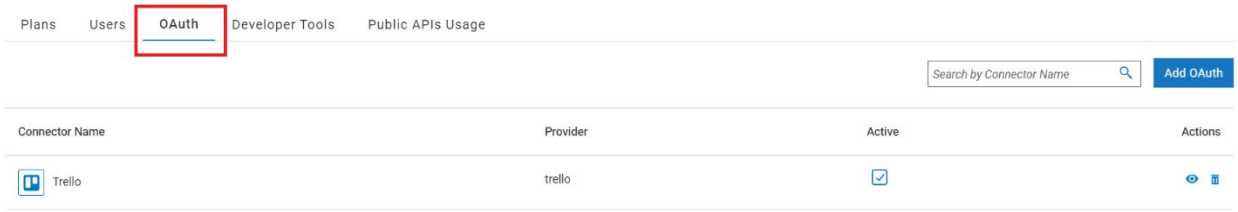


- Date: Date on which deployments were executed
- **User Execution:** Total number of deployment execution for the selected user

You can use the date and time picker on the right-hand corner to set a custom time range and retrieve specific records.

3.5.3 OAuth

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

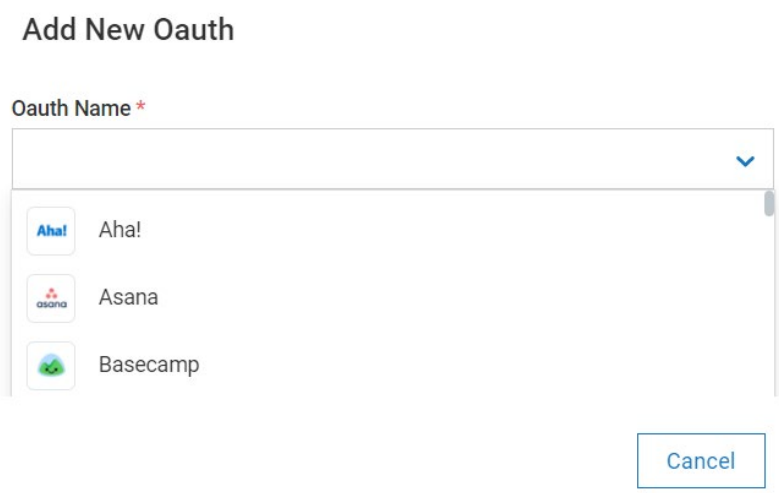


You can see the list of service OAuth associated with your application, along with the following details:

- **Provider:** The provider associated with your OAuth.
- **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).

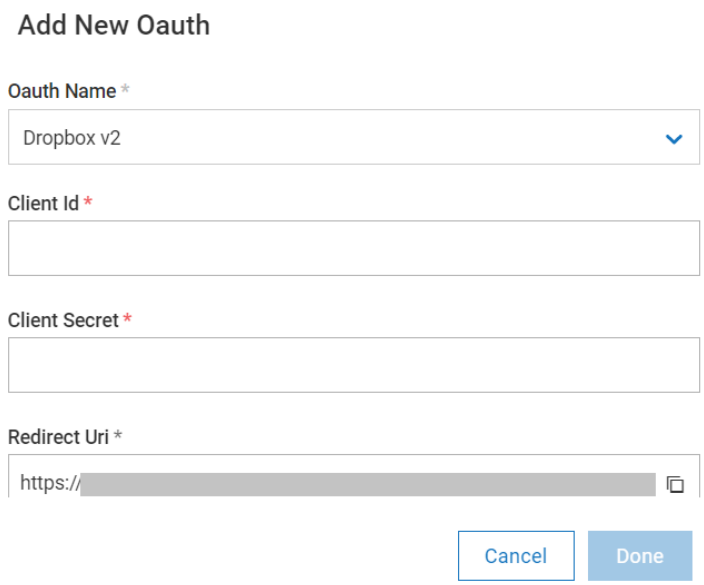
3.5.3.1 Adding a new OAuth

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 OAuth' button at the top-right corner of the **OAuth** page. A new 'Add New OAuth' window appears.



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.

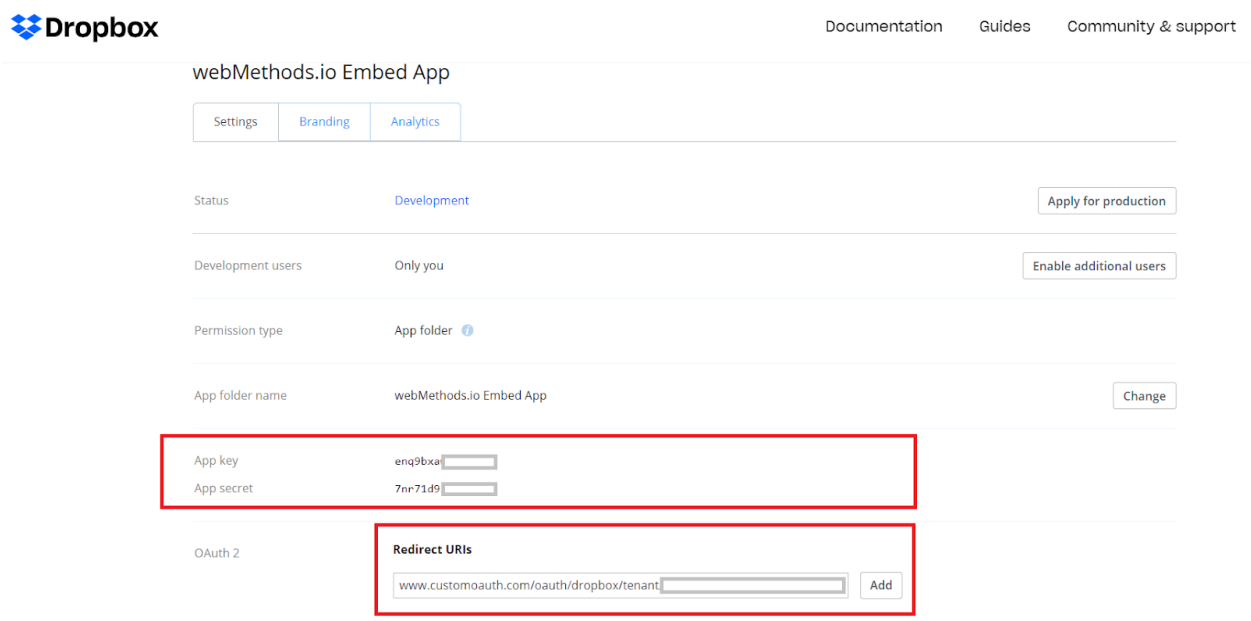
Once you have specified the service name, you can see three additional fields in the form:



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

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

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

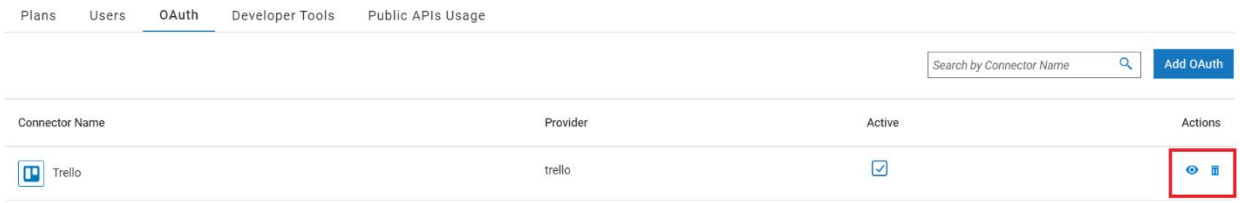


Once you have entered these details, click ‘Done’. This will create an OAuth for the specified service in your Embed Admin.

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.

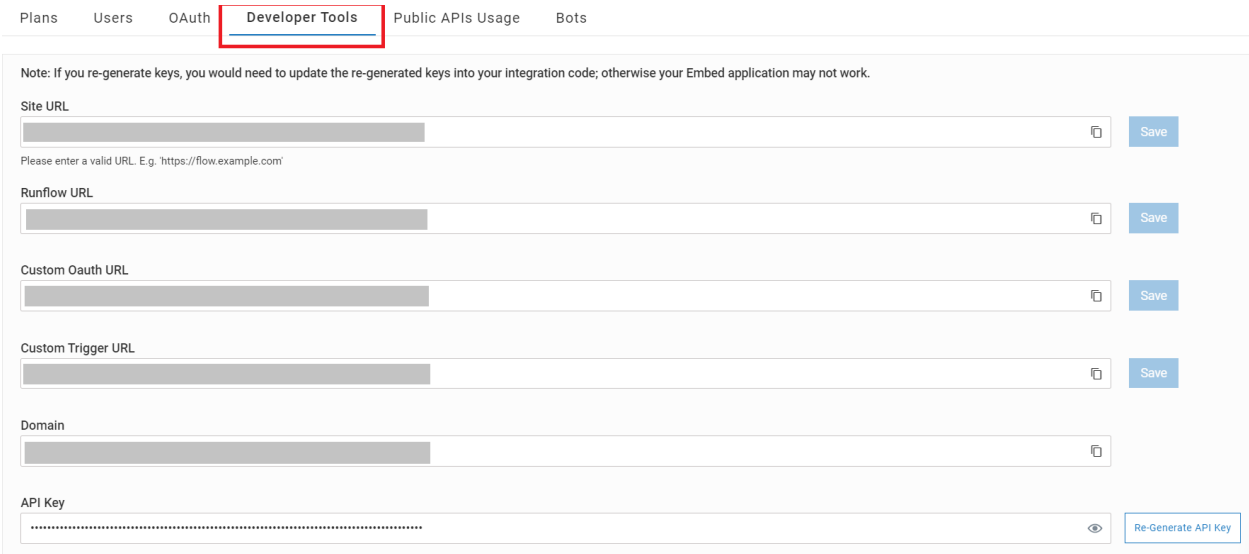


To view an existing OAuth, click 'View'. To delete an existing OAuth, click 'Delete' listed under 'Actions'.

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

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 on '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.

Public APIs Key: To invoke our public APIs, pass 'public_apis_key' as key and value of this field as value in the headers of your API request. Click 'Re-Generate Public APIs Key' 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.

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 Public APIs Usage

You can view the usage statistics of the public APIs provided by webMethods.io Embed. To do so, navigate to **Settings** > **Public APIs Usage.**

Note: To get the webMethods.io Embed Swagger API documentation, contact our customer support team at support-wmio@softwareag.com.

Plans | Users | OAuth | Developer Tools | **Public APIs Usage** | Bots

Search by API | 06/22/2021 12:29 PM – 07/22/2021 12:29 PM

API	Method	Status	Invoked at	Actions
/embed/v2/plans	GET	200	08/07/2021 04:08:37 AM PDT	
/embed/v2/plans	GET	200	07/07/2021 10:31:15 PM PDT	
/embed/v2/plans	GET	200	30/06/2021 12:53:50 AM PDT	
/embed/v2/plans	GET	200	30/06/2021 12:36:05 AM PDT	
/embed/v2/plans	GET	200	30/06/2021 12:36:03 AM PDT	
/embed/v2/plans	GET	200	30/06/2021 12:36:01 AM PDT	
/embed/v2/plans	GET	200	30/06/2021 12:36:00 AM PDT	

API: API endpoint

Method: The HTTP method associated with the API.

Status: The status of the API execution request.

Invoked at: The date and time at which the API was invoked.

Actions: Contains the list of action controls for the API.

- **View API Details:** View the details such as API endpoint, request, response, associated with the API request.

API Details

API: GET /embed/v2/plans

Status: 200

Invoked at: 08/07/2021 04:08:37 AM PDT

Body: {}

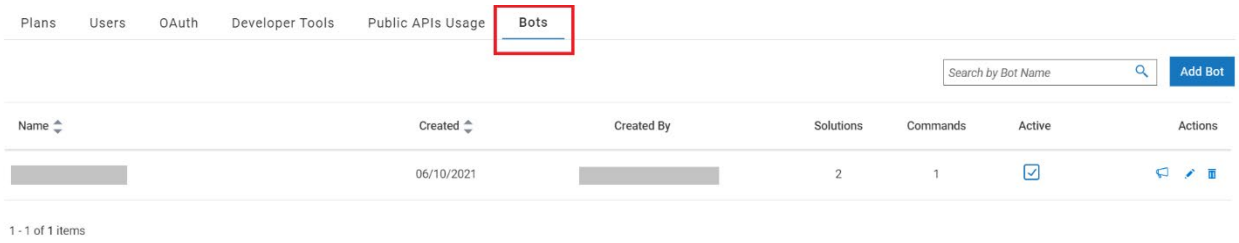
Response:


```
{
  "output": {
    "skip": 0,
    "limit": 1000,
    "count": 8,
    "plans": [
      {
        "_id": "[redacted]",
        "consumer_count": 5,
        "type": "individual",
        "used": 0,
        "users": [
          "[redacted]",
          "[redacted]",
          "[redacted]",
          "[redacted]",
          "[redacted]"
        ],
        "default": true,
        "connectors": [],
        "solutions": [],
        "solution_list": [],
        "tags": [],
        "deleted_at": null,
```

3.5.6 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'.

Note: This feature is not available to any tenants by default. Contact our support team at support-wmio@softwareag.com to enable Bots feature for your tenant.

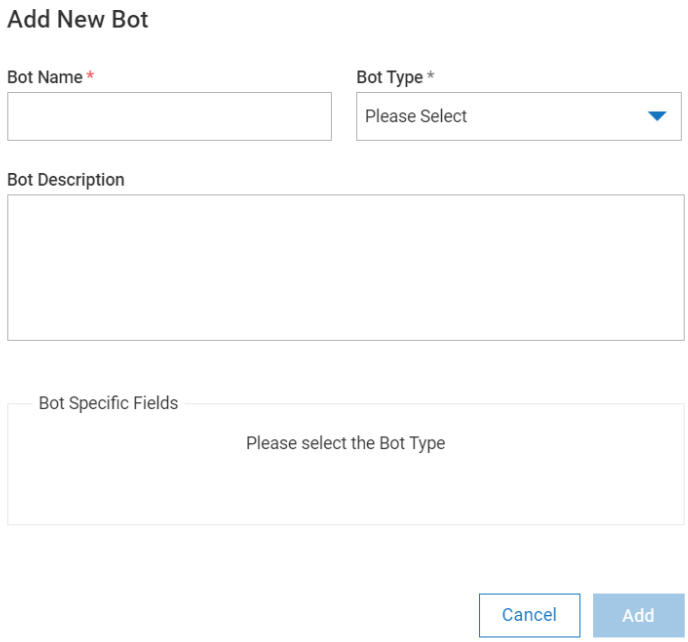


Here, you can see the list of all bots associated with your webMethods.io Embed Admin account, along with the following details:

- **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
- **Commands:** Number of commands 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.
    - **Broadcast Message in 1:1 Space:** To broadcast the pre-set message in all the associated 1:1 space
    - **Edit:** To modify the bot details
    - **Delete:** To delete the bot from Embed Admin

3.5.6.1 Creating a new bot

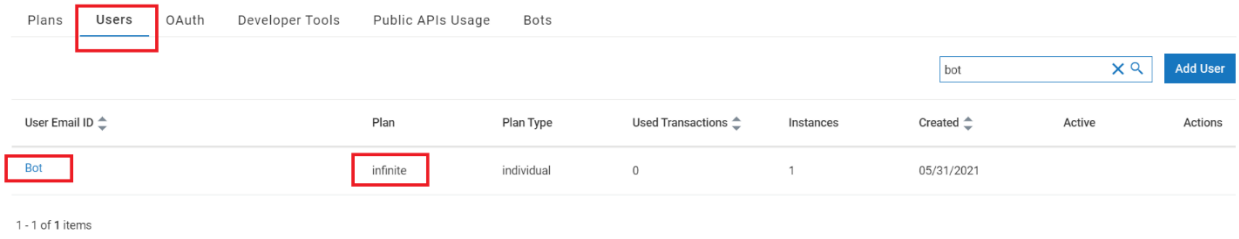
To create a new bot, click on the **Add Bot** button in the top-right hand corner of the 'Bots' page. A new 'Add New Bot' window will appear on the screen.



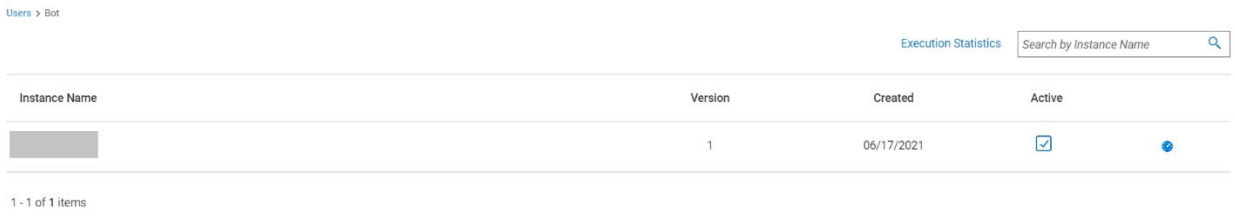
Bot Name: Provide a suitable name for the bot.
Bot Description: Provide a short description about the bot.
Bot Type: Select the type of bot you want to add.
As soon as you select a bot type, other fields related to the selected bot will get rendered in the window.

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 commands associated with it.



- **Instance Name**: Name of the bot command
- **Version:** Version of the bot command
- **Created:** Date on which the bot command was created
- **Active:** Whether the bot command is active or not. You can check or uncheck the checkbox to active and deactivate the associated bot command respectively.
- **Show Workflow Execution Statistics**: Get the execution statistics of the instance.

You can optionally click the **Accounts** tab to see associated accounts, the **Authorizations** tab to see associated authorizations, and **Execution Statistics** tab to see the associated execution statistics. Please refer the **'Users'** section to understand these three tabs in detail.

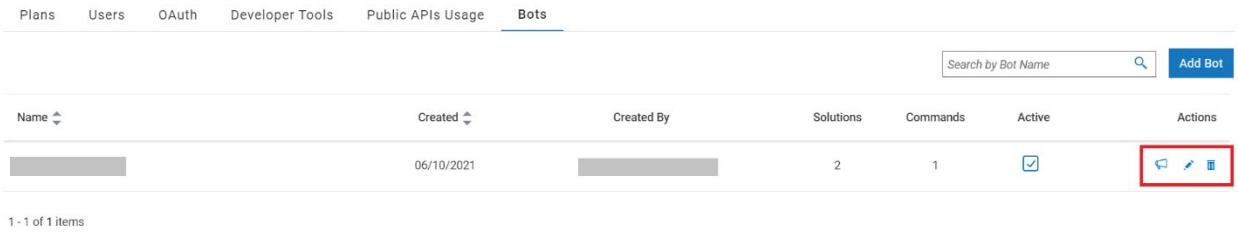
3.5.6.2 Updating or deleting a bot

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

You can optionally publish the broadcast messages set while creating the bot to all the 1:1 bot spaces by clicking the broadcast icon.

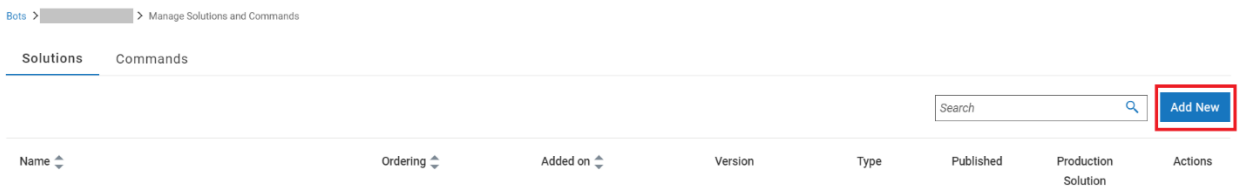
Note:

- 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.

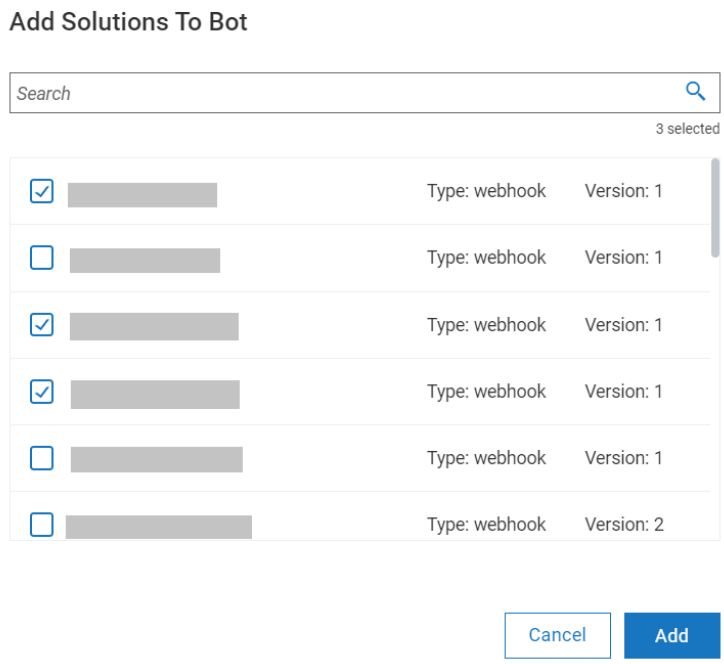


3.5.6.3 Adding solutions to a bot

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.



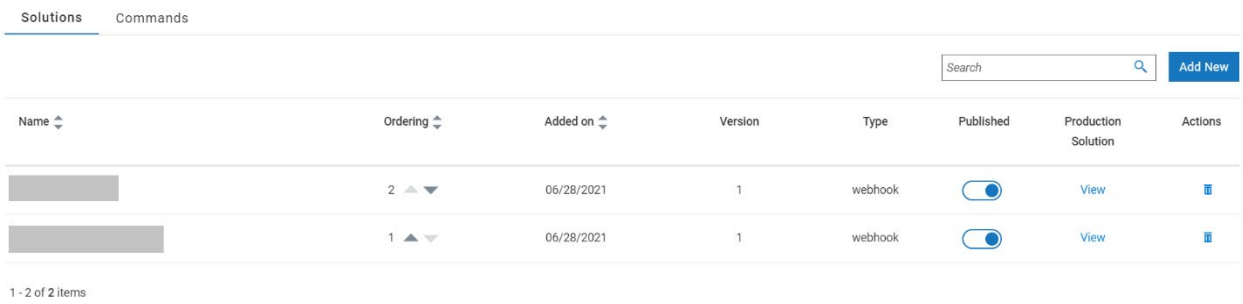
To add a solution to the selected bot, click on ‘Add New’ button on the top-right corner of the window. A new ‘Add Solutions to Bot’ window will appear on screen where you can see the list of existing solutions of your Embed Admin account along with their versions.



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

3.5.6.4 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’.



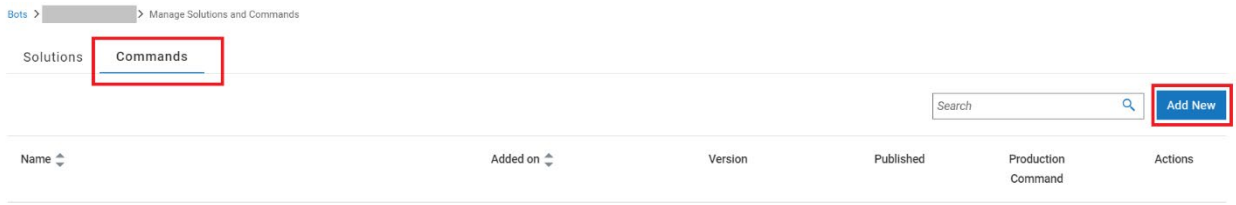
Here, you can view all the solutions associated with the selected bot, along with the following details:

- **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.

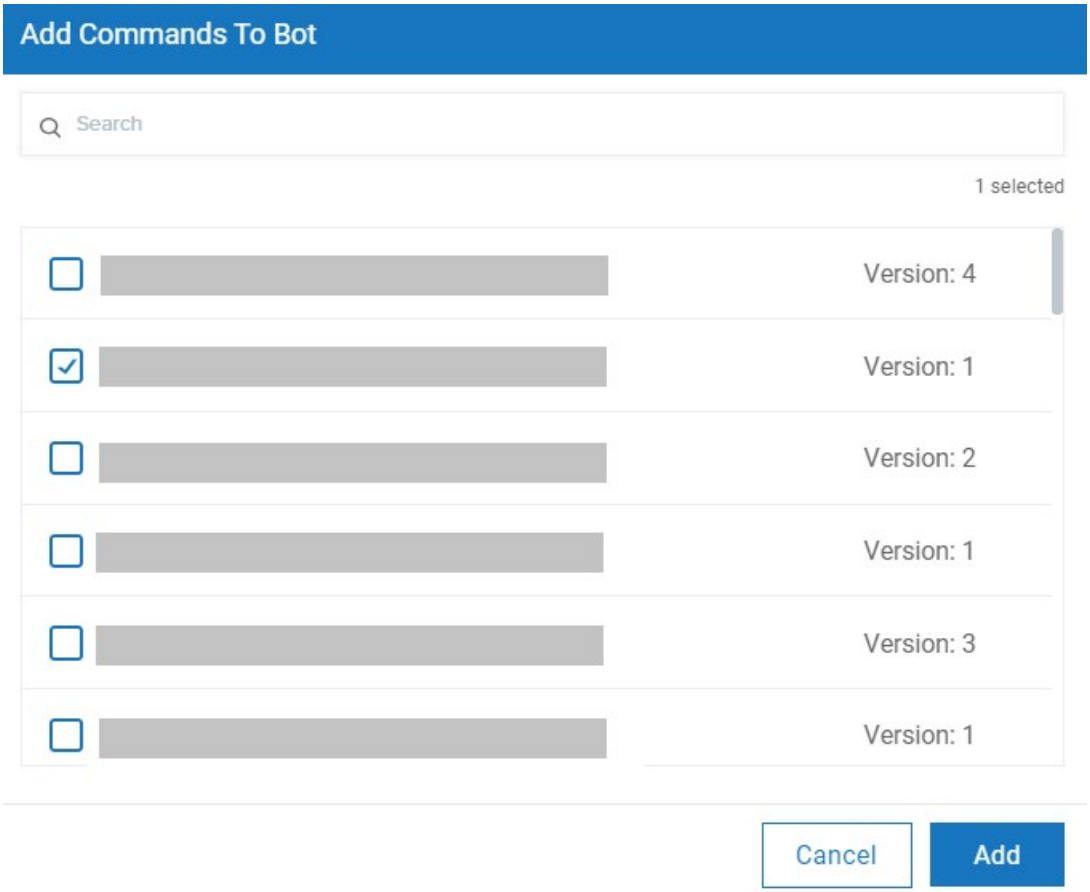
3.5.6.5 Adding commands to a bot

Once you have created a bot, you can add existing commands of your webMethods.io Embed Admin account to it. 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 command solution and click on it. You will be redirected to the 'Manage Solutions and Commands' window. Click on the COMMANDS tab.



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

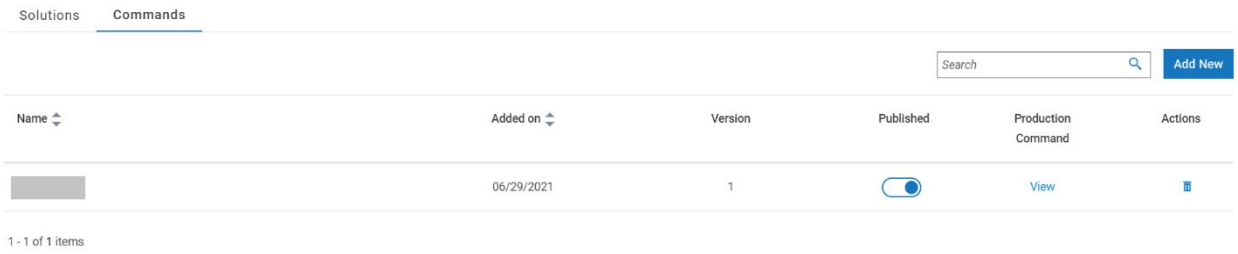
the list of existing commands of your webMethods.io Embed Admin account along with their versions.



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

3.5.6.6 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.



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.

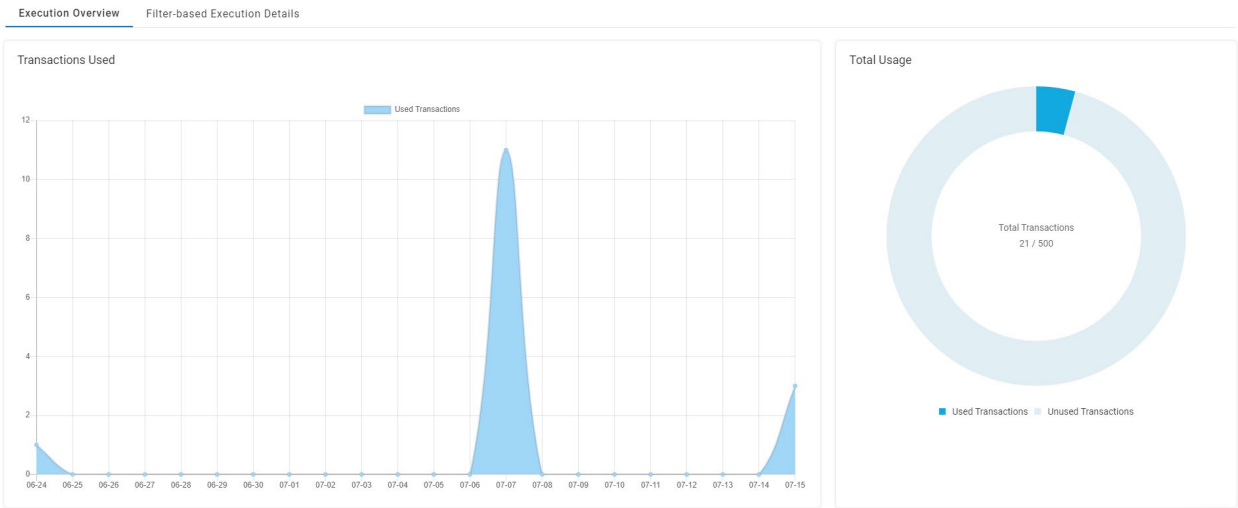
You can also add more commands to the bot using the 'Add New' button.

3.6 Metrics

The **Metrics** tab 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.

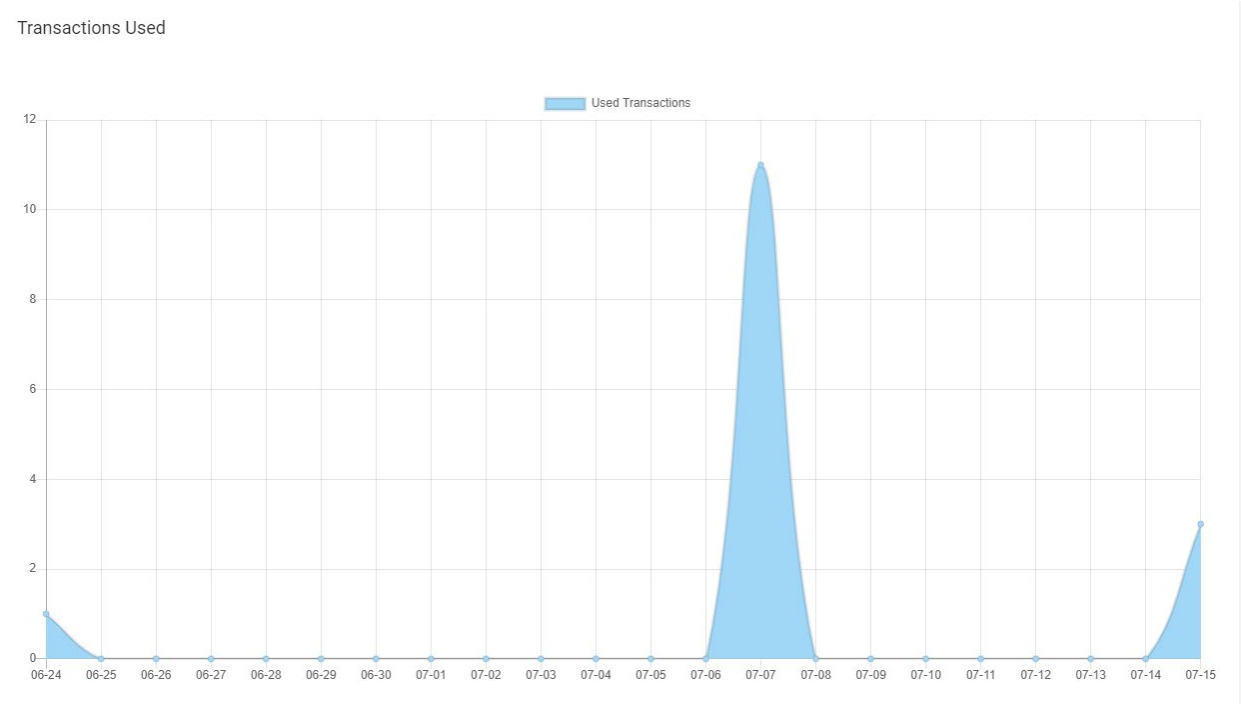


3.6.1.1 Execution Overview

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

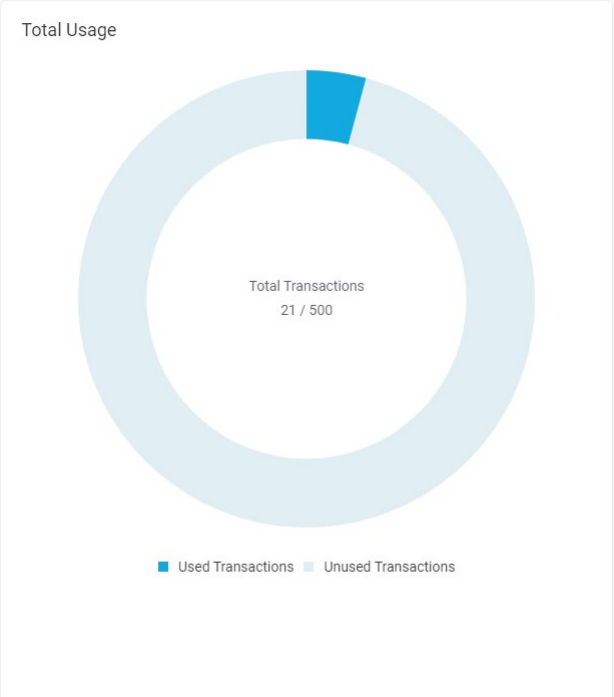
Transaction Used

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).



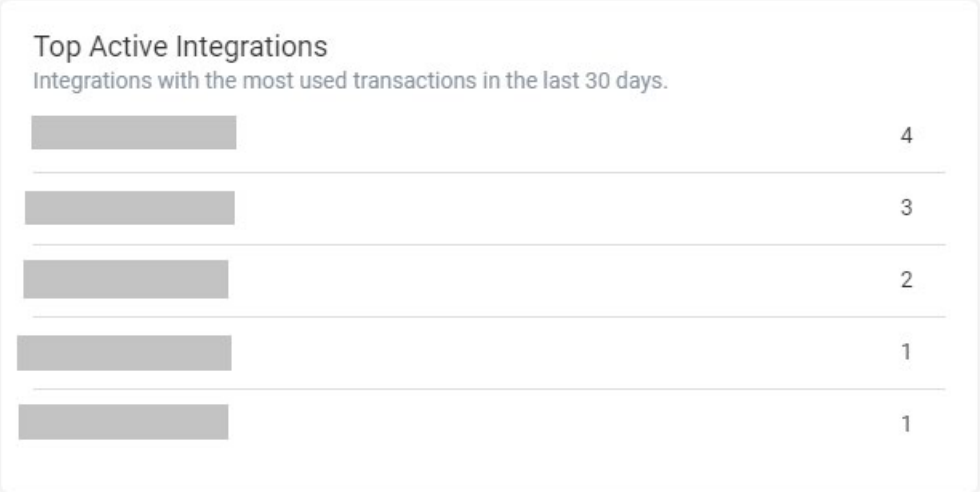
Total Usage

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



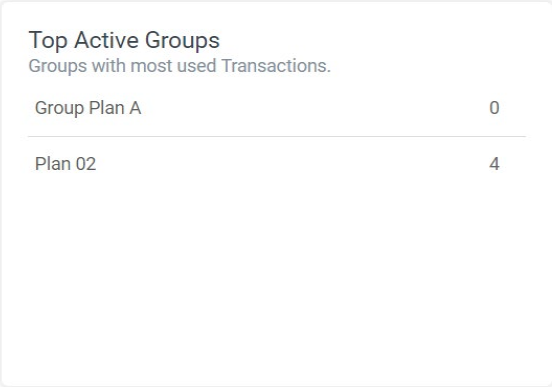
Top Active Integrations

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



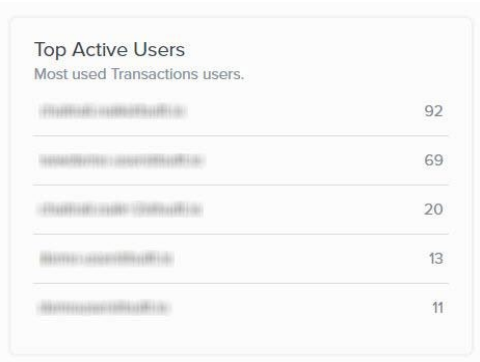
Top Active Groups

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



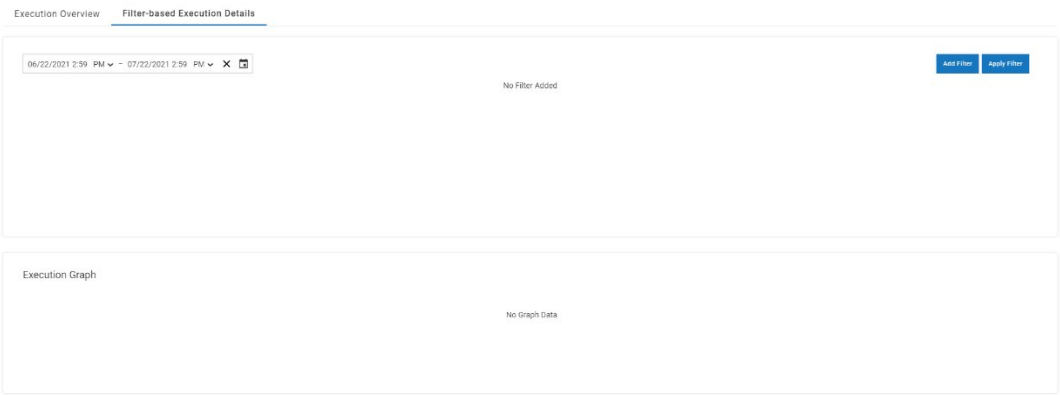
Top Active Users

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



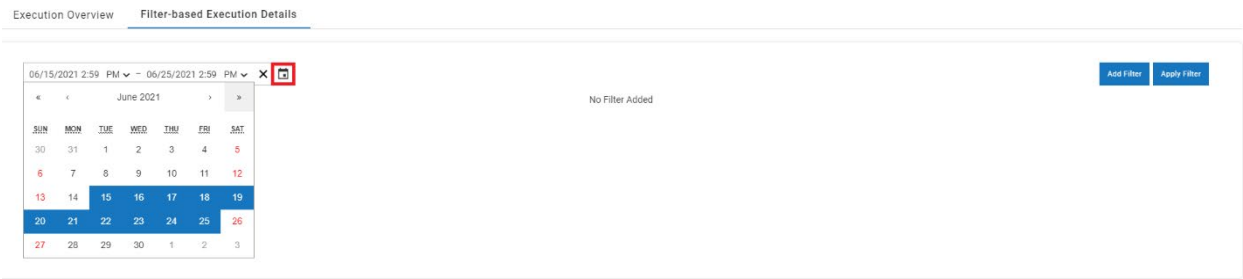
3.6.1.2 Filter-based Execution Details

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.



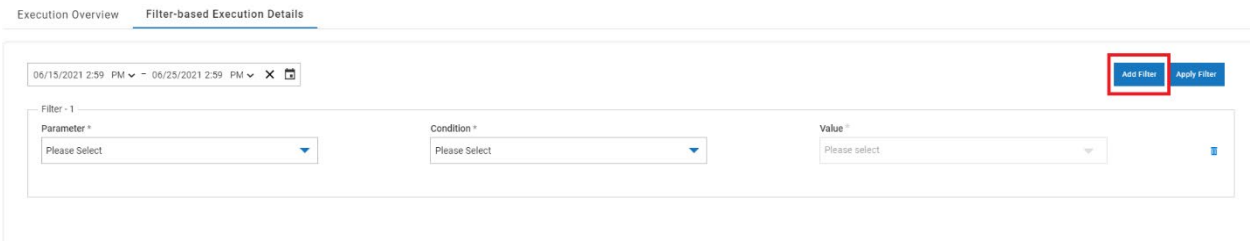
Setting Custom Time Frame

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.



Adding Filters

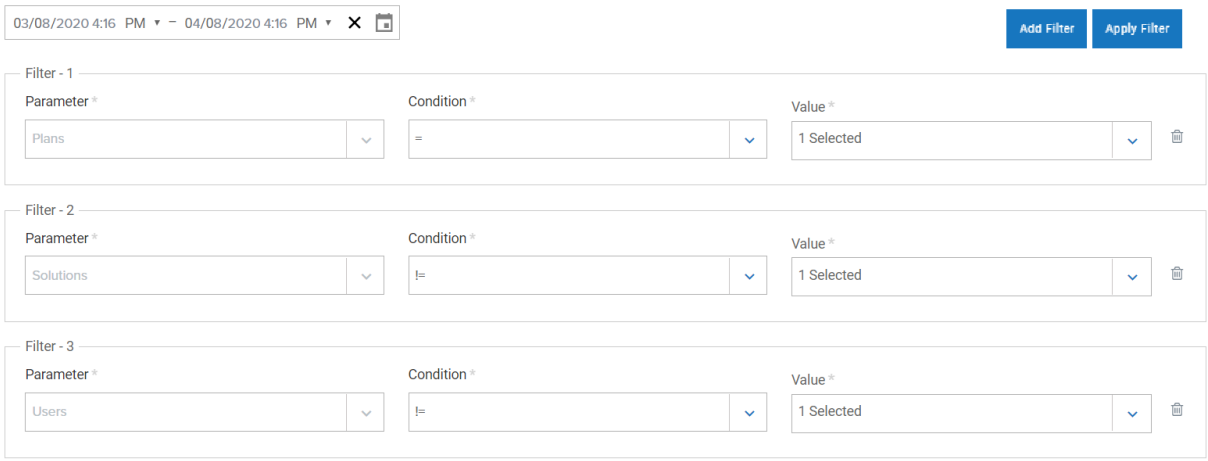
You can add filters to fetch the execution logs associated with specific plans, solutions, and users. To do so, click on the Add Filter button. A new filter field will appear in the window.



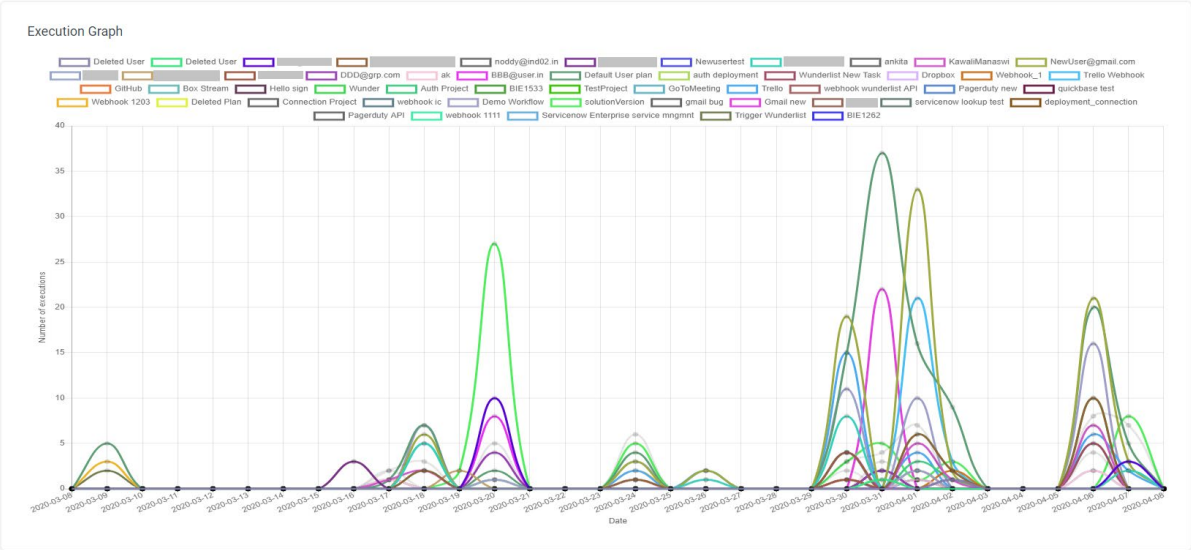
- **Parameter:** Select the parameter (Plans/Solutions/Users) on which you want to apply the filter. You can apply one filter for each parameter by clicking the 'ADD FILTER' button.
- **Condition:** Select the relevant conditional operator (= or !=).

- **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.



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



3.7 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
- 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.

4 Multitenancy

webMethods.io Embed offers the multitenancy feature that enables you to manage multiple subtenants through a single master tenant. This is especially useful for organizations that have multiple customers with specific integration requirements.

4.1 Master Tenant

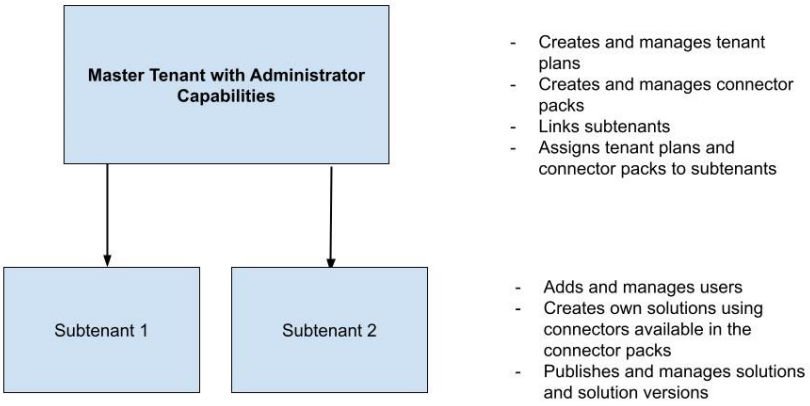
Master tenant is the core tenant from which you can manage configurations for all the linked subtenants.

There are two types of master tenants:

- Master tenant with administrator capabilities
- Master tenant with administrator and Embed capabilities

4.1.1 Master Tenant with Administrator capabilities

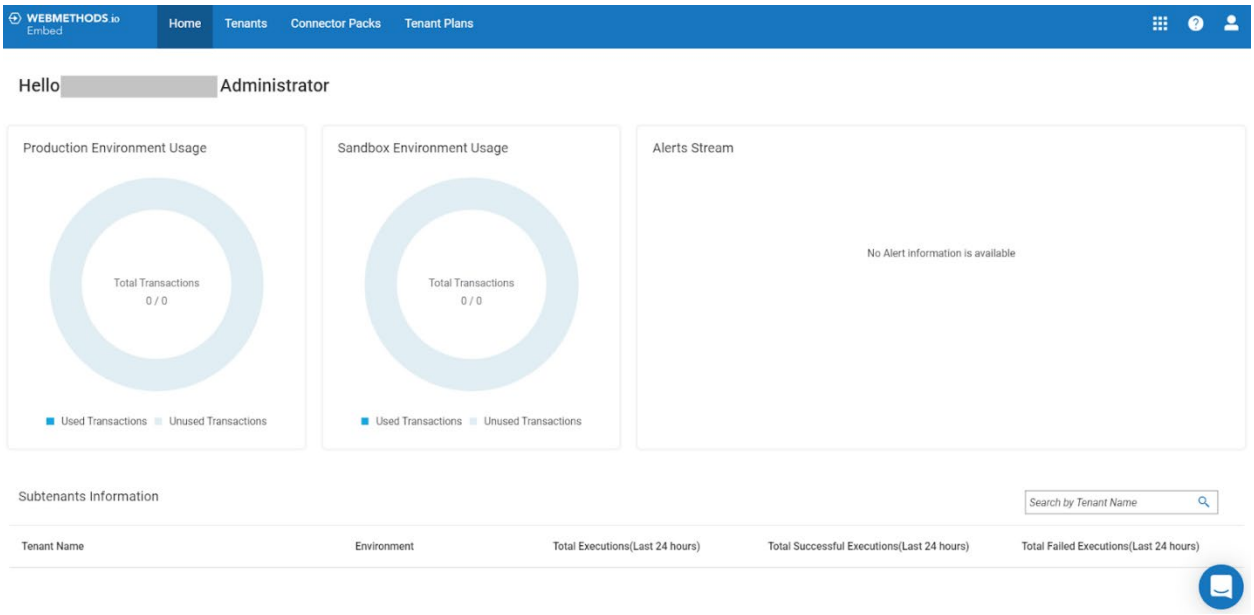
This type of master tenant allows you to link existing tenants as subtenants to your master tenant and manage the connectors packs and tenant plans associated with those subtenants.



4.1.1.1 Setting up a master tenant with administrator capabilities

To set up a master tenant with administrator capabilities, send us an email to support-wmio@softwareag.com from your registered email address requesting for the master tenant with administrator feature.

Once the master tenant is created, you can login to it by providing the username and password associated with the tenant. This will take you to your master tenant dashboard where you can see the following main menus:



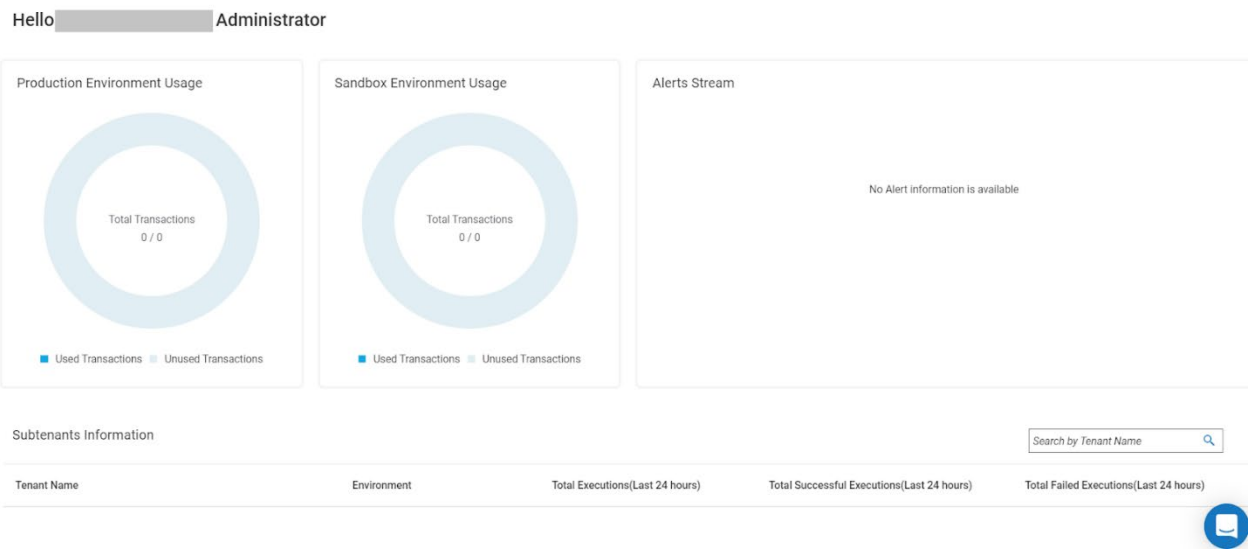
- **Home:** View the statistical information associated with the subtenants.
- **Tenants**: Link existing tenants that are created under the master account on the Software AG Cloud to the master tenant and view/manage the plan and connector pack(s) associated with each subtenant.
- **Connector Packs:** Create, view, and manage the connector packs that can be assigned to the subtenants.
- **Tenant Plans:** Create tenant plans and specify the transaction limit for each plan. These plans can then be assigned to the associated subtenants.

We will now understand each of these main menus in detail.

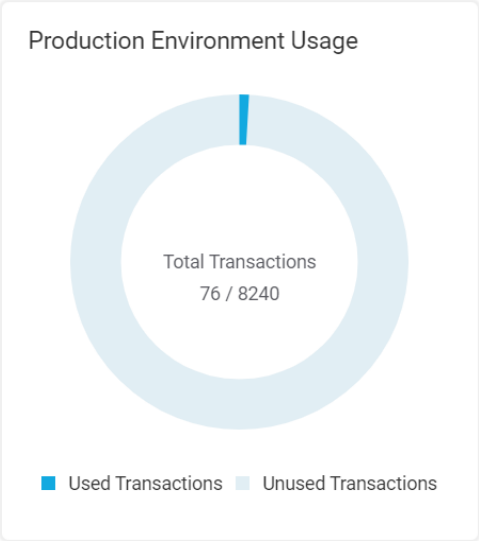
4.1.1.2 Home

The Home menu lets you view the usage statistics associated with the subtenants.

When you click on the Home menu you will see the following sections:

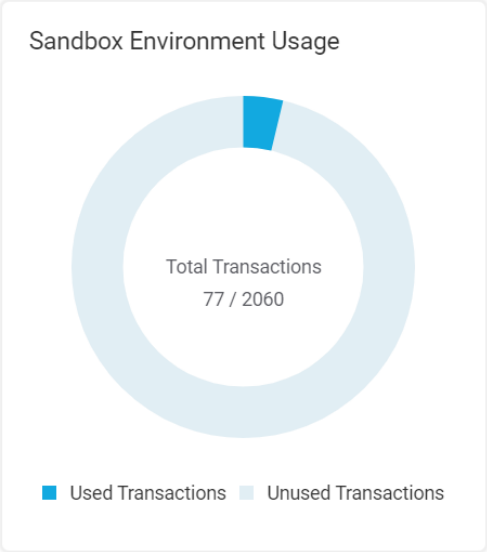


Production Environment Usage
This section shows the total number of transactions used on the production environments of the linked subtenants collectively, out of the total production environment transactions allocated to the subtenants.



Sandbox Environment Usage

This section shows the total number of transactions used on the sandbox environments of the linked subtenants collectively, out of the total sandbox environment transactions allocated to the subtenants.



Alerts Stream

This section shows the list of overage alerts for the subtenants associated with your master tenant.

Subtenants Information

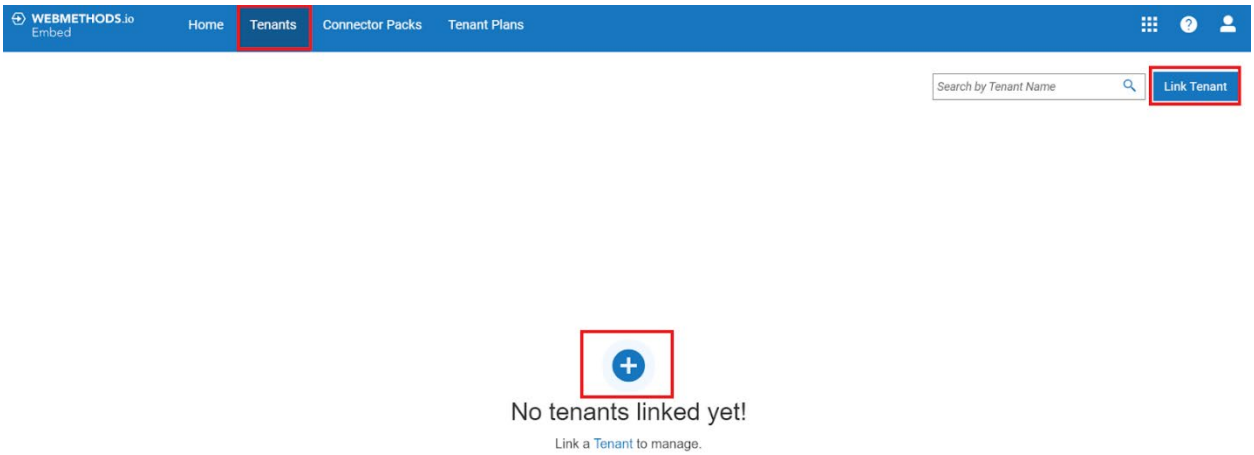
This section shows the list of all subtenants linked to your master tenant and their execution activity details for the last 24 hours. You can optionally use the search box to retrieve the execution activity details of a specific subtenant.

4.1.1.3 Tenants

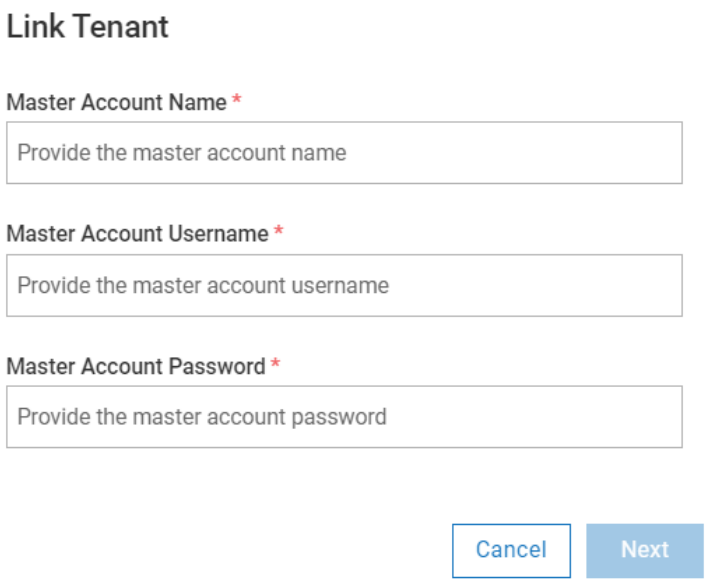
The Tenants menu lets you link, view, and manage subtenants of your master tenant.

Linking Tenants

Click on the + icon or the **Link Tenant** button to link an existing tenant created under the master account on Software AG Cloud as a subtenant to your master tenant.



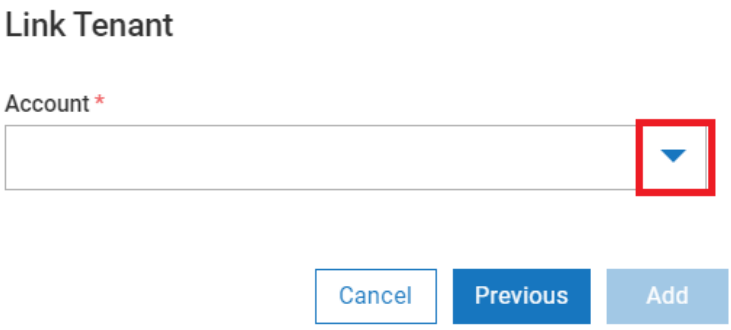
Next, enter the following details in the **Link Tenant** dialog box that appears:



Master Account Name: Enter the name of the Software AG Cloud master account.
Master Account Username: Enter the username associated with the Software AG Cloud master account.
Master Account Password: Enter the password of the Software AG Cloud master account.

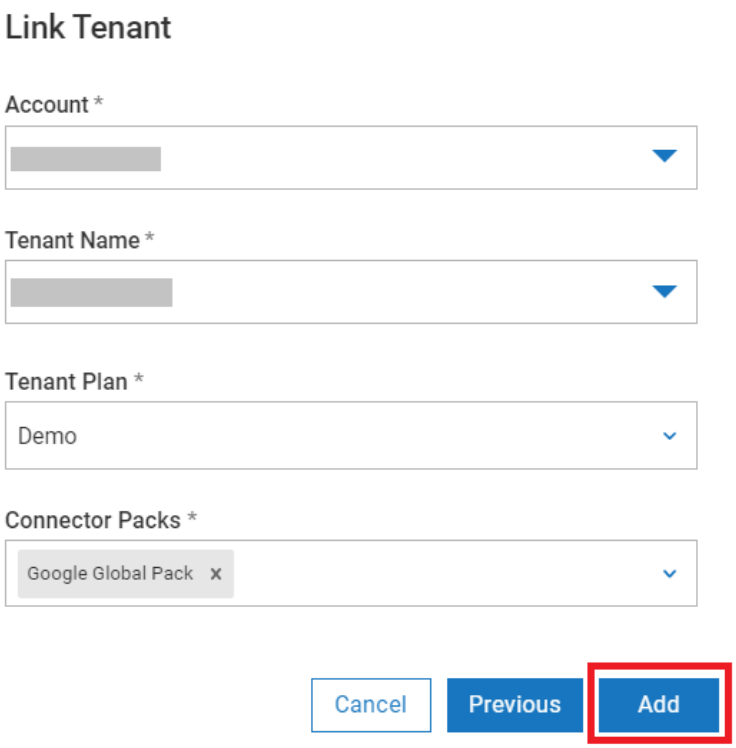
Once you have entered these details, click **Next**.

In the next screen that appears, you will be prompted to select an account.



Account: Select the account created under the master account on the Software AG Cloud.

As soon as you select an account, a few more fields will be populated to the **Link Tenant** dialog box.



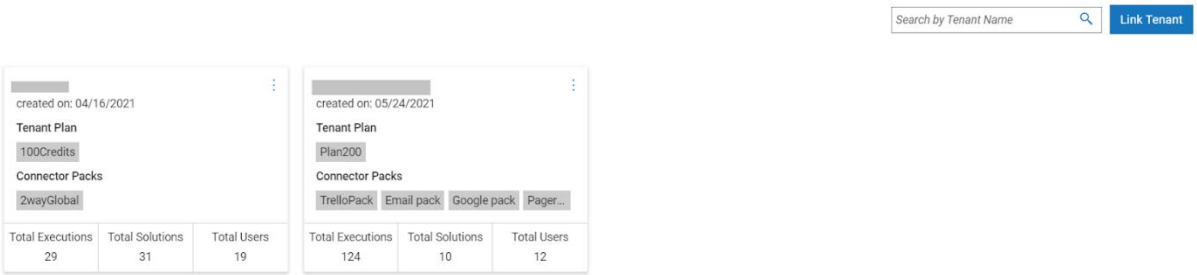
Tenant Name: Select the name of the environment (tenant) you want to link.
Tenant Plan: Select the plan you want to assign to the selected tenant. The transactions allocated to the selected plan will be the maximum number of transactions that can be consumed by this tenant.
Connector Packs: Select the connector pack(s) you want to assign to the tenant. Only the connectors that are present under the selected connector pack(s) will be available to the selected tenant.

Once this is done, click **Add**.

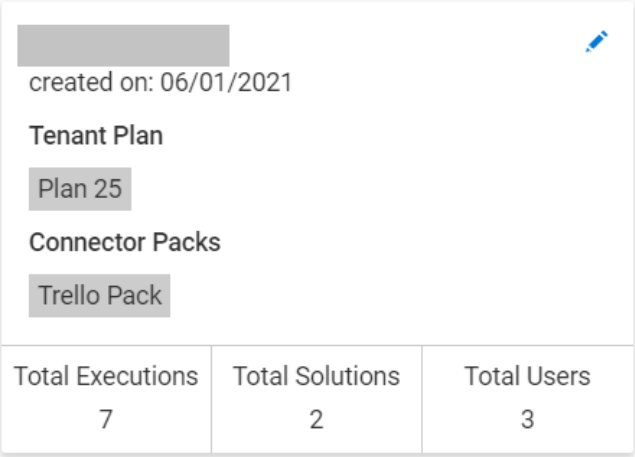
This will link the specified tenant as a subtenant to your master tenant.

Viewing Linked Tenants

All tenants linked to your master tenant are listed on the **Tenants** screen.



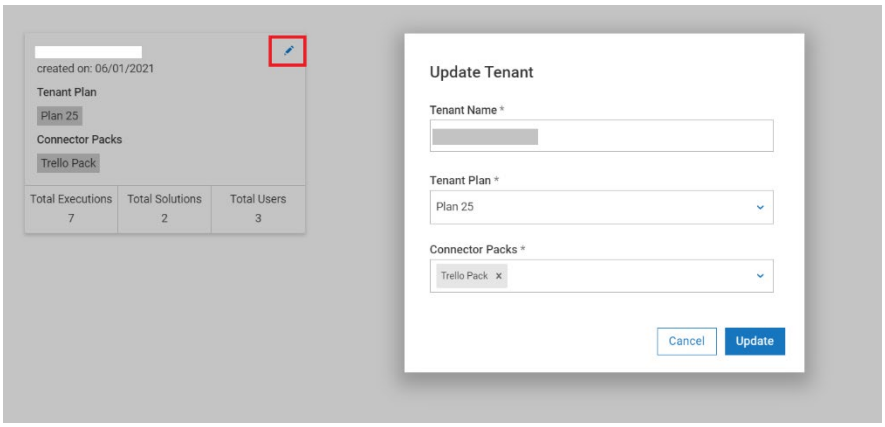
On each subtenant card, you will find the following details:



- Name of the subtenant
- Date on which the subtenant was created and subscribed to webMethods.io Integration from the master account created on Software AG Cloud.
- The plan assigned to the subtenant tenant
- The connector pack(s) assigned to the subtenant
- Total executions performed inside the subtenant
- Total solutions present inside the subtenant
- Total users present inside the subtenant

Managing Linked Tenants

You can update the plan and connector pack(s) assigned to a tenant by clicking the **Edit** icon. When you do so, the Update Tenant dialog box will appear where you can specify the required changes.



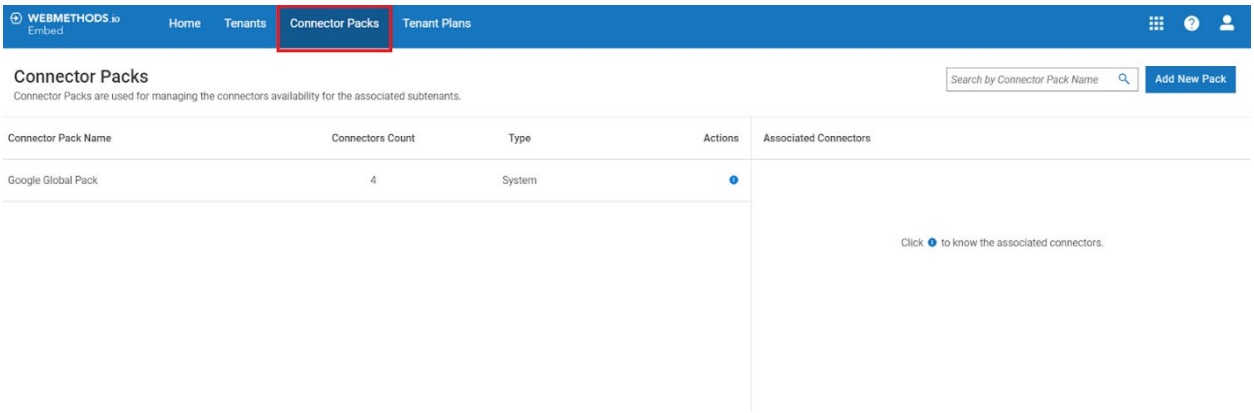
Tenant Name: You cannot update the Tenant Name field. It will show the name of the selected subtenant.
Tenant Plan: Select the tenant plan you want to assign to the subtenant.
Connector Pack: Select the connector pack(s) you want to assign to the subtenant.

Once this is done, click **Update**.

With this, your subtenant configurations will be updated.

4.1.1.4 Connector Packs

The Connector Packs menu lets you add and manage the connector packs of your master tenant. Each connector pack can consist of one or more connectors. Once a connector pack is created, it can be assigned to any subtenant as per the requirements.



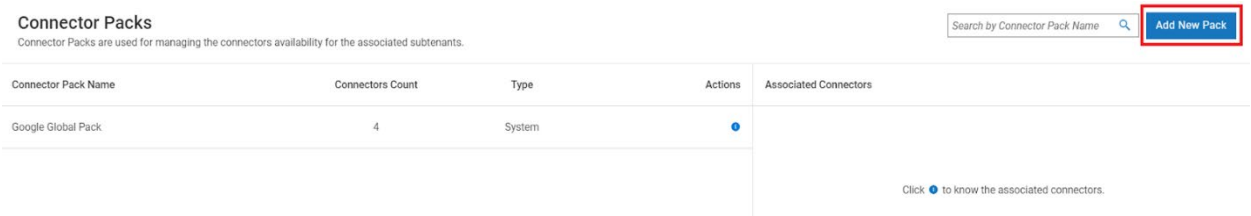
There are two types of connector packs:

1. System Connector Packs: These are the global connector packs that are provided by webMethods.io Embed by default and available to all master tenants. They cannot be edited or deleted. When you first click on the Connector Packs menu, you can see the list of all available system connector packs.

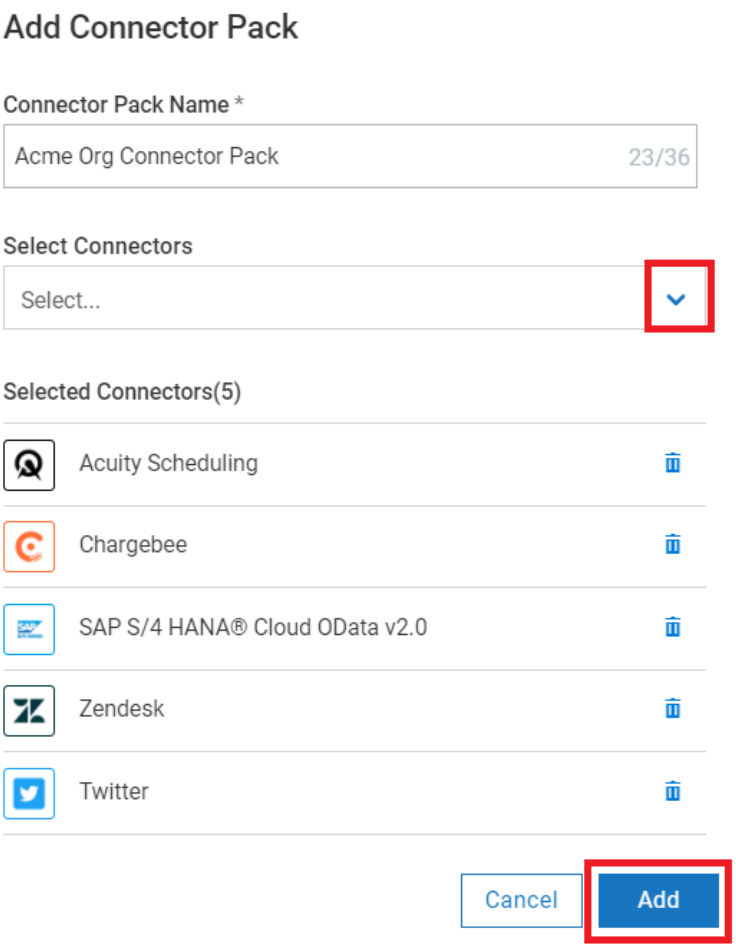
2. Custom Connector Packs: These are the custom connector packs that are created by the administrators of a master tenant. They can be edited and deleted as per the requirements.

Adding Connector Packs

To add a new connector pack, click on the Add New Pack button.



In the Add Connector pack dialog box that appears, enter the following details:

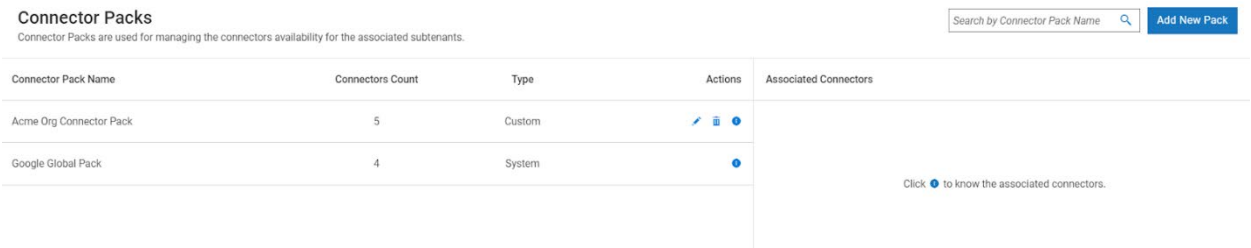


Connector Pack Name: Provide a name for the custom connector pack.
Select Connectors: Click on the drop-down button and select the required connectors you want to add to the pack. The selected connectors will be displayed under the Selected Connectors list. You can click on the associated delete button to remove any selected connector.

Once this is done, click Add to add the connector pack.

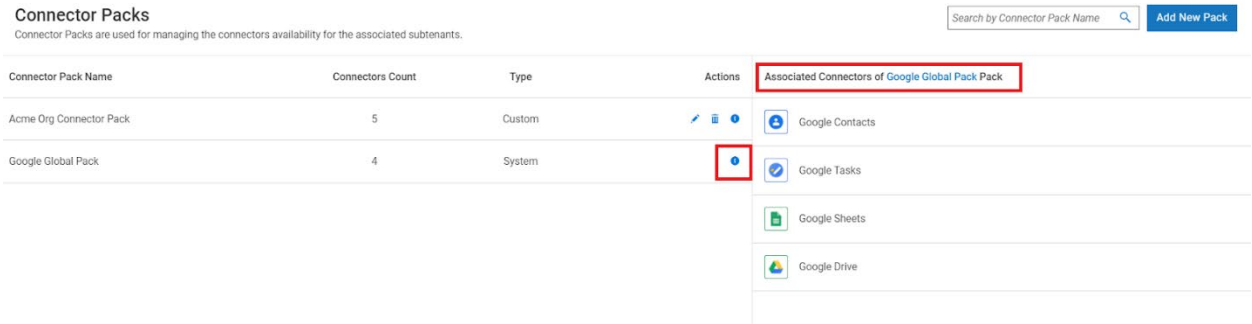
Managing Connector Packs

You can view and manage the connector packs of your master tenant by clicking the Connector Packs menu.



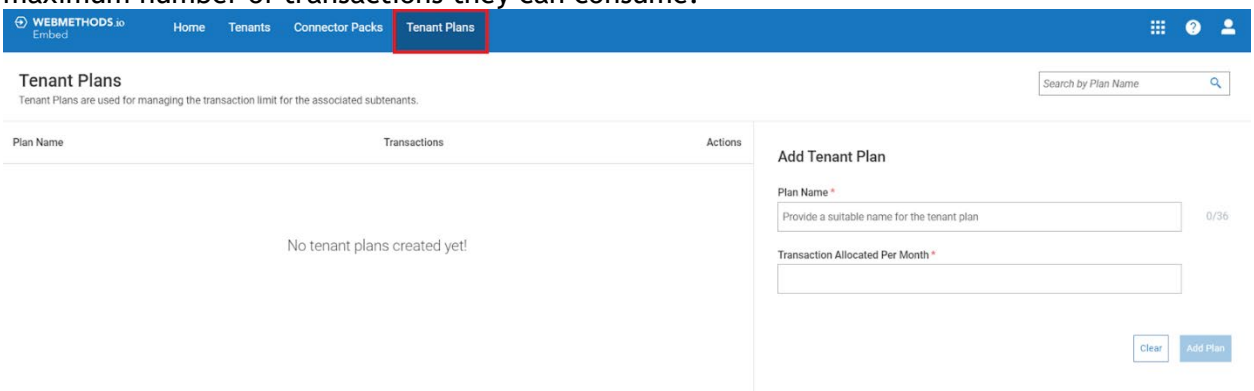
Connector Pack name: Name of the connector pack.
Connector Count: Number of connectors present inside the connector pack.
Type: Whether the connector pack is of type System or Custom.
Actions: Contains action controls to manage the connector pack.

- Edit: Change the connector pack name or connectors present inside the connector pack.
- Delete: Delete the connector pack.
- View: View the list of connectors present inside the connector pack.



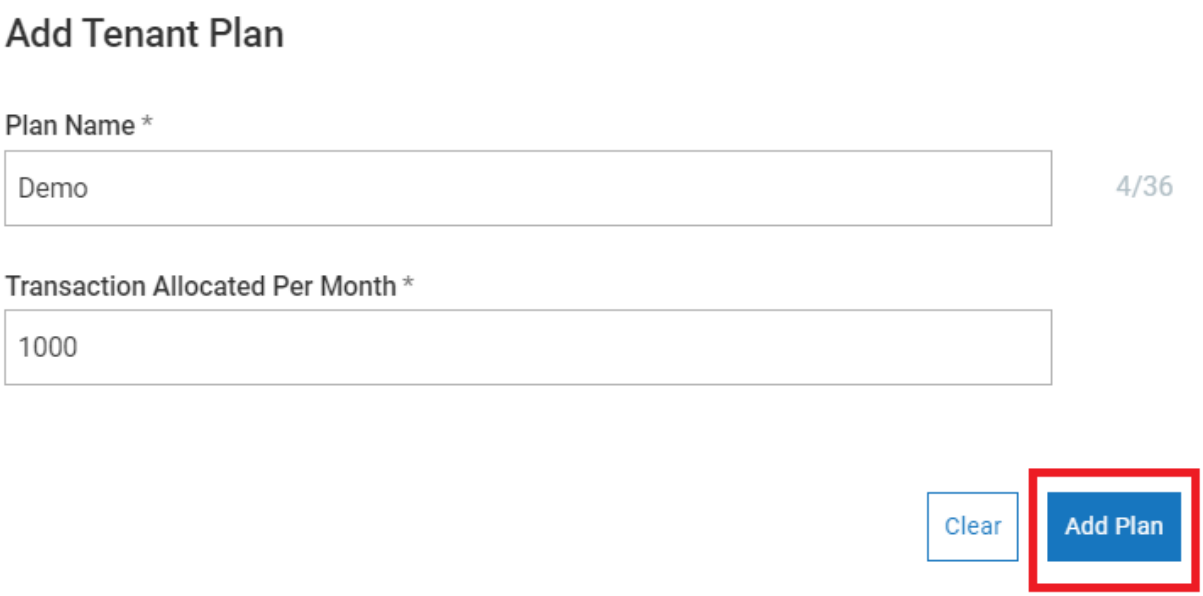
4.1.1.5 Tenant Plans

The Tenant Plans menu lets you view, create, and manage the tenant plans and their allocated transactions. These tenant plans can then be assigned to subtenant(s) to specify the maximum number of transactions they can consume.



Adding Tenant Plans

To create a new tenant plan, provide the following details:

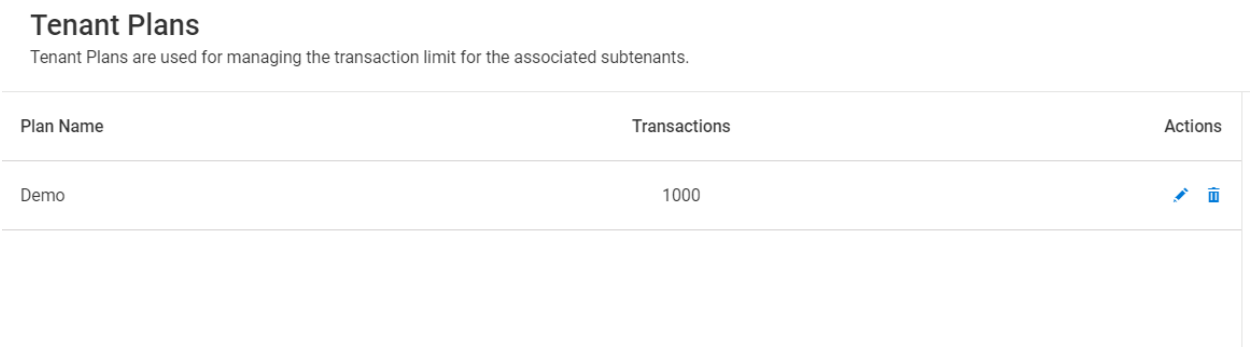


Plan Name: Provide a name for the tenant plan.
Transaction Allocated Per Month: Provide the total count of transactions that should be assigned to this plan every month.

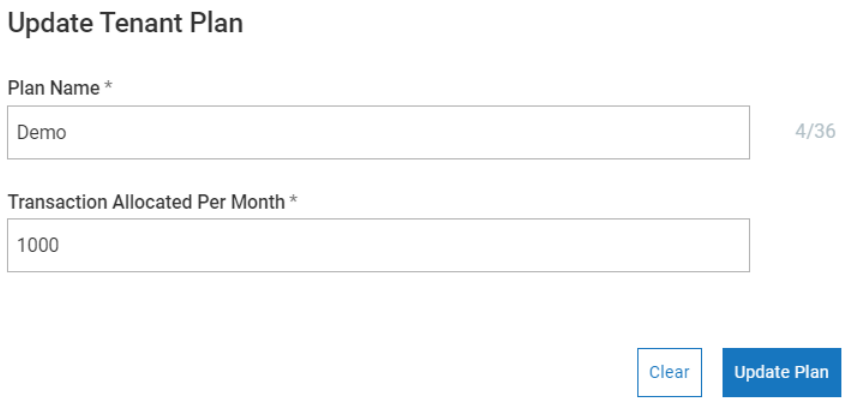
Once this is done, click Add Plan. This will add the specified tenant plan in your master tenant.

Managing Tenant Plans

You can view and modify the details of your tenant plans. To do so, click the **Tenant Plans** menu.

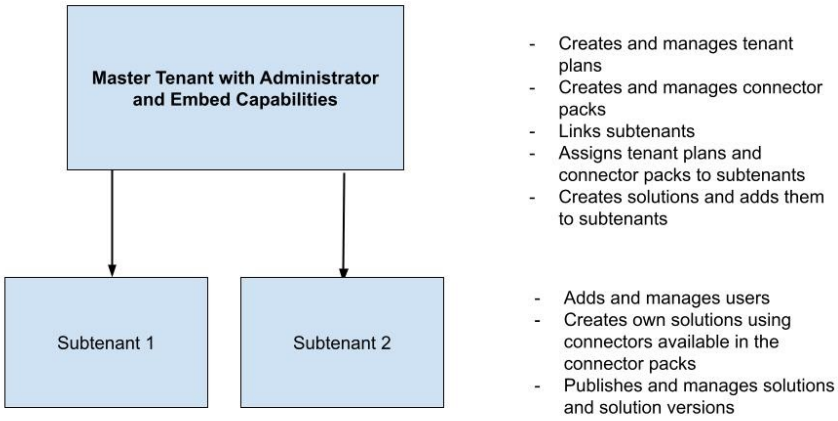


- **Plan Name:** Name of the tenant plan.
- **Transactions:** The total count of monthly transactions allocated to the selected tenant plan.
- **Actions:** Contains action controls to manage the tenant plans.
    - **Edit:** Change the name and transactions of the selected tenant plan.
    - **Delete:** Delete the selected tenant plan.



4.1.2 Master Tenant with Administrator and Embed capabilities

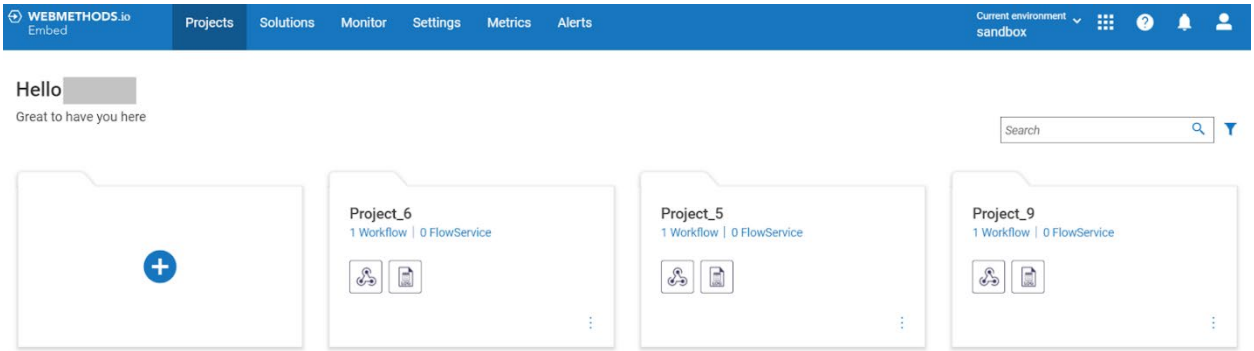
This type of master tenant allows you to link existing tenants as subtenants to your master tenant and manage the connectors packs and tenant plans associated with those subtenants. Apart from this it also contains all the features available under webMethods.io Embed Admin Portal.



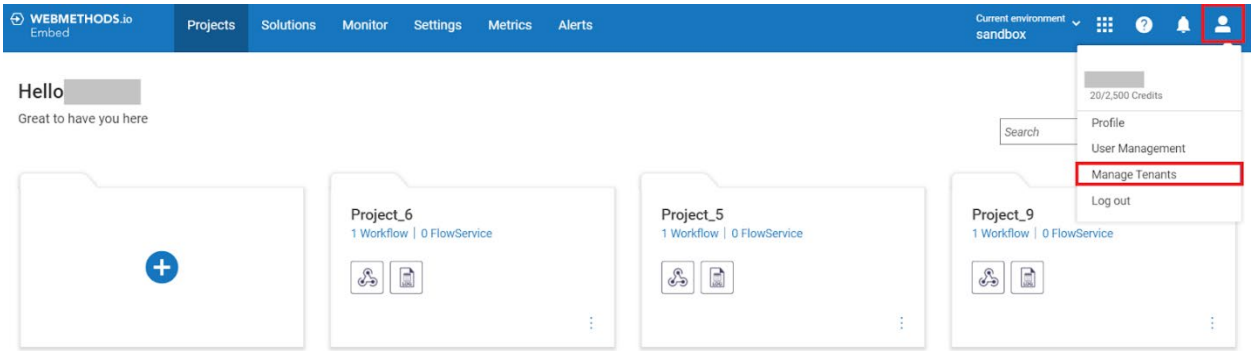
4.1.2.1 Setting up a master tenant with administrator and Embed capabilities

To set up a master tenant with administrator and Embed capabilities, send us an email to support-wmio@softwareag.com from your registered email address requesting for the master tenant with administrator and Embed feature.

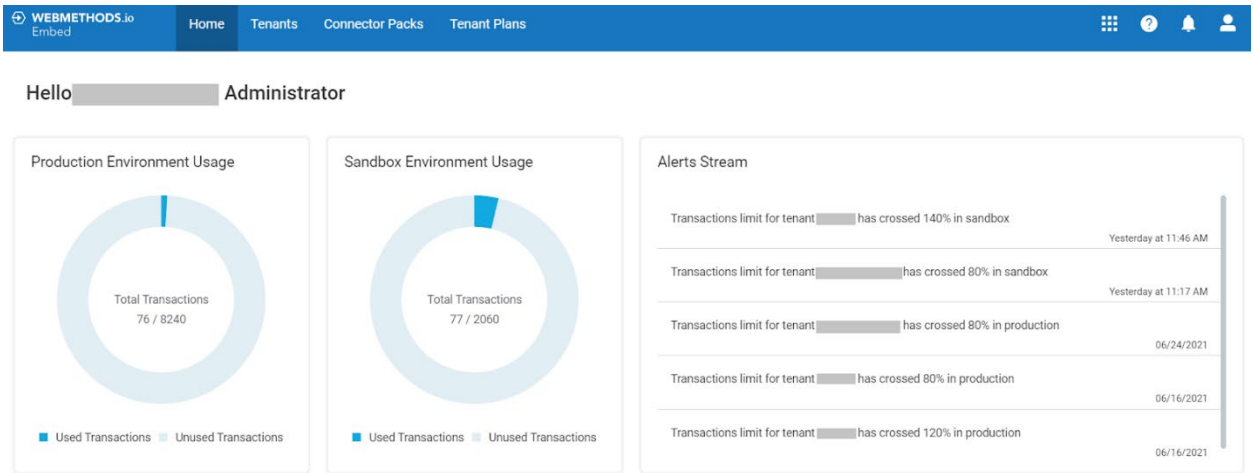
Once the master tenant is created, you can login to it by providing the username and password associated with the tenant. This will take you to the webMethods.io Embed dashboard.



To navigate to the master tenant, click on the **profile icon** and then select **Manage Tenants** option.



This will take you to your master tenant dashboard.



- **Home:** View the statistical information associated with the subtenants.
- **Tenants:** Link existing tenants as subtenants to the master tenant and view/manage the plan and connector pack(s) associated with each subtenant.
- **Connector Packs:** Create, view, and manage the connector packs that can be assigned to the subtenants.
- **Tenant Plans:** Create tenant plans and specify the transaction limit for each plan. These plans can then be assigned to the associated subtenants.

We will now understand each of these main menus in detail.

4.1.2.2 Home

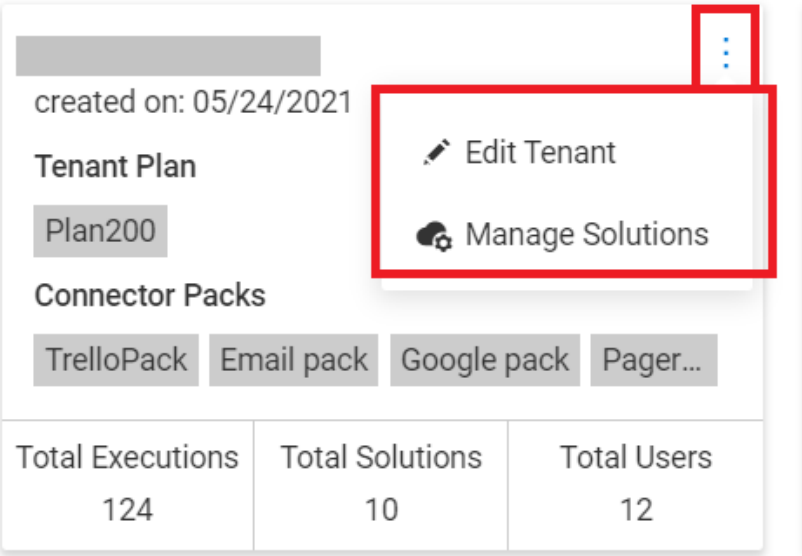
Please refer to 4.1.1.2 Home section for detailed information on this menu.

4.1.2.3 Tenants

Please refer to Linking Tenants and Viewing Linked Tenants topics for detailed information.

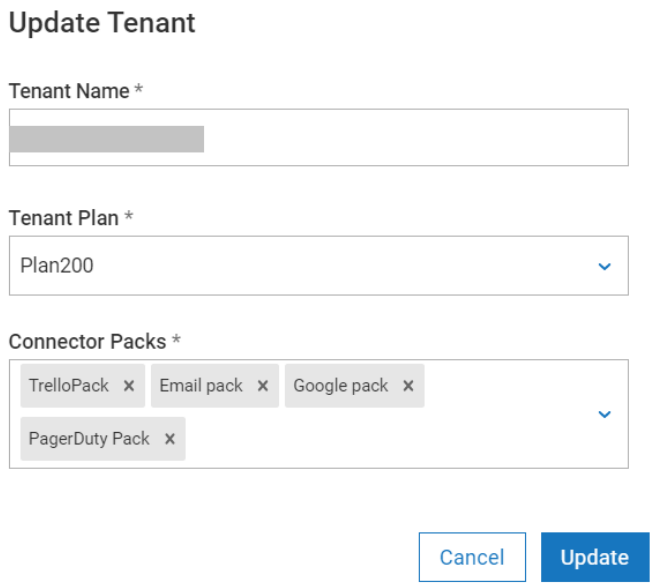
Managing Linked Tenants

You can manage the plan, connector pack(s), and solutions assigned to a specific subtenant by clicking the **vertical ellipsis icon** on the subtenant card.



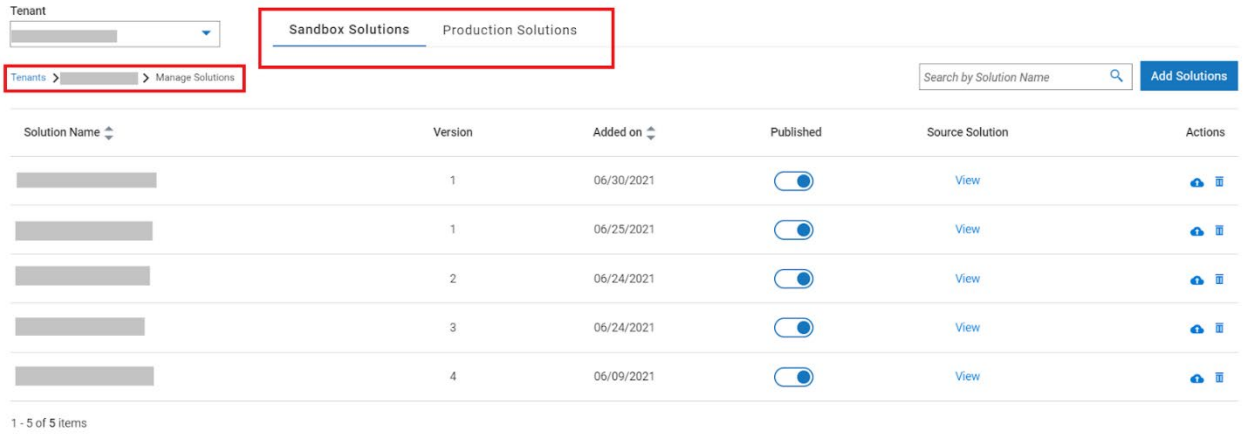
Editing Tenant

Select the **Edit Tenant** option to change the plan and connector pack(s) assigned to the selected tenant.



Managing Solutions

Select the **Manage Solutions** option to add and manage solutions for the selected subtenant.



The Sandbox Solutions tab shows the list of solutions added by the master tenant to the sandbox environment of the selected subtenant. It shows following details for each solution:

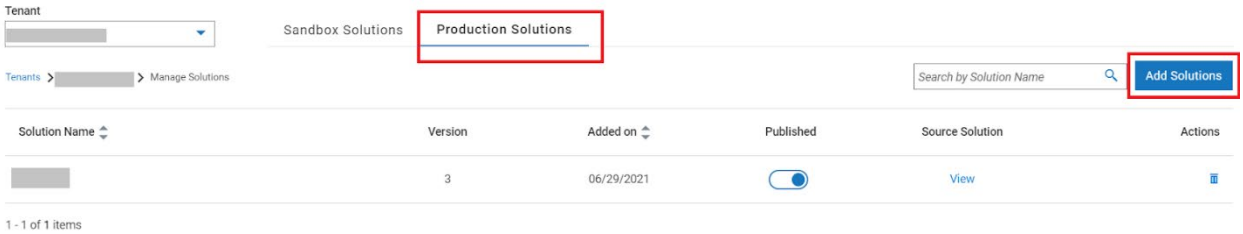
- **Solution Name:** Name of the solution
- **Version:** The version of the solution
- **Added on:** The date on which the solution was added to the subtenant
- **Published:** Whether the solution is currently published on the sandbox environment
- **Source Solution:** Click on the 'View' label to navigate to the source solution present in the production environment of the master tenant.
- **Actions:** Contains action controls to manage the solutions.
    - **Deploy to subtenant production environment**: Click the deploy icon to deploy the solution to the production environment of the selected subtenant.
    - **Delete solution from subtenant:** Click the delete icon to delete the solution from the sandbox environment of the selected subtenant.

Similarly, the **Production Solutions** tab shows the list of solutions deployed to the production environment of the selected subtenant along with the above-mentioned details.

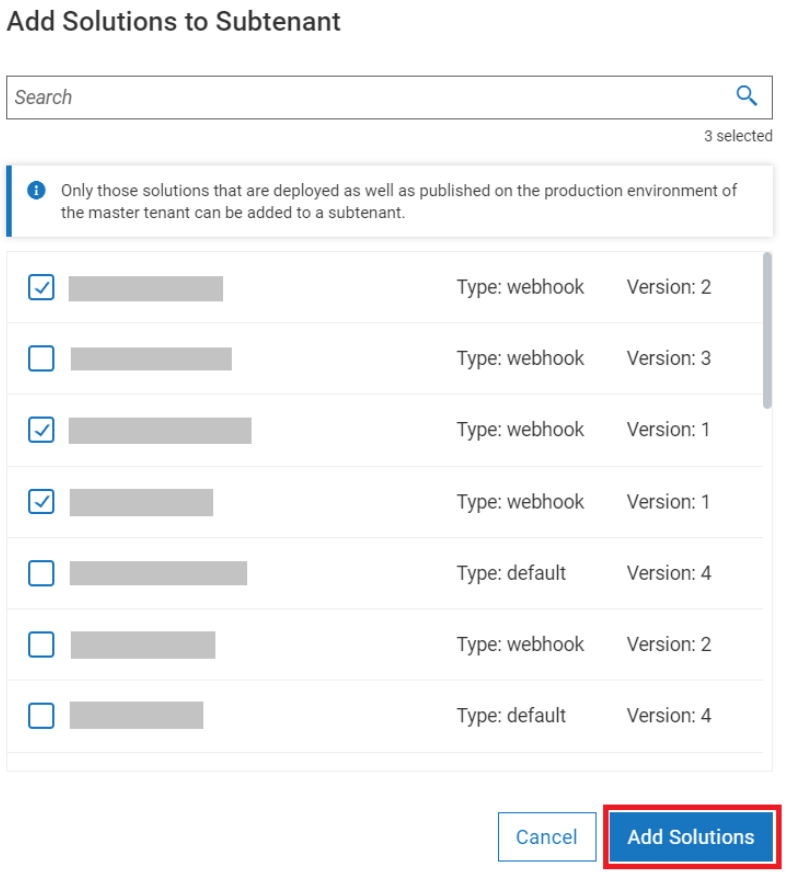
Adding Solutions

You can add solutions that are deployed and published to the production environment of the master tenant to any of the subtenants.

To add a solution to a subtenant, click on either **Sandbox Solutions** or **Production Solutions** tab based on the environment where you want to add solution(s) and then click the **Add Solutions** button.

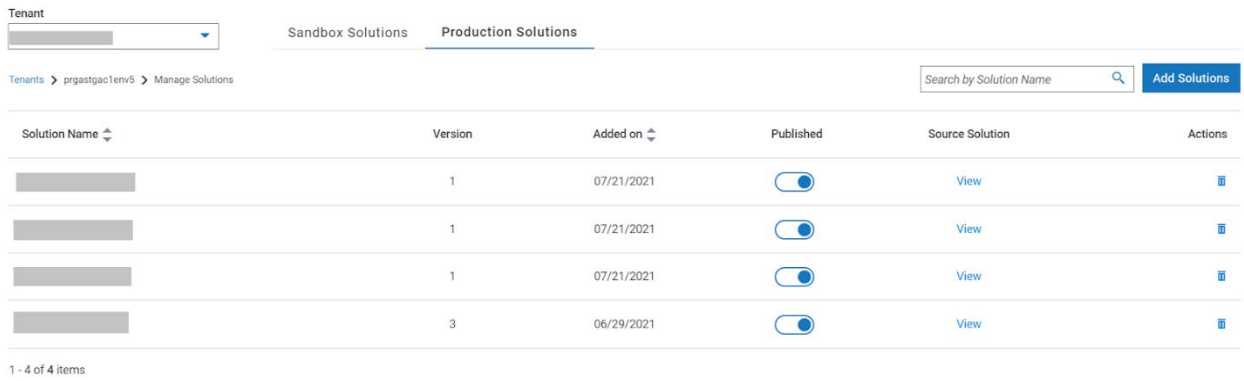


In the **Add Solution to Subtenant** dialog box that appears, select the solution(s) you want to add to the selected subtenant.



Once this is done, click **Add Solutions**.

This will add the solution to the specified environment of the selected subtenant.



4.1.2.4 Connector Packs

Please refer to 4.1.1.4 Connector Packs section for detailed information on this menu.

4.1.2.5 Tenant Plans

Please refer to 4.1.1.5 Tenant Plans section for detailed information on this menu.

4.2 Subtenants

The working of the subtenants will remain the same as any of the ordinary tenants enabled with webMethods.io Embed feature, except for the connector and transaction limitations.

Connector Limitation

Only those connectors that are present under the connector pack(s) assigned by the master tenant administrator will be available to the subtenant. This means that the subtenant administrator can create solutions using only those connectors that are present in the assigned connector pack.

Transaction Limitation

The tenant plan assigned to a subtenant by a master tenant will determine the maximum total number of transactions available for consumption for that subtenant.