

Worksoft RPA Orchestrator Installation Guide

Worksoft RPA Orchestrator Installation Guide

Version 12

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Chapter 1

Preparing Your System for Worksoft RPA Orchestrator

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Overview

Worksoft RPA Orchestrator allows organizations to automate repeated tasks and complex processes across multiple enterprise applications and systems in a seamless and code-less way.

Administrators create digital workers that work alongside employees to accomplish repeated tasks and processes so that employees can focus on value added tasks.

Worksoft RPA Orchestrator Package

The Worksoft RPA Orchestrator package consists of the following components:

Component	Description
Worksoft Orchestrator (version).exe	Executable that installs Worksoft RPA Orchestrator.
SqlScripts.zip	Zip file contains database scripts that create and upgrade RPA databases.

Worksoft Portal

Before you install RPA Orchestrator, verify that you have installed the following products and services:

Component	Description
Authentication service	This service is an identity provider for Worksoft products, and it should be installed on the same server as Worksoft Portal.
Worksoft Portal	Worksoft Portal is an administration tool that registers database settings, licenses, users, tenants, and email SMTP settings. RPA Orchestrator leverages this information.
Cryptography service	This service exports Certify processes to RPA Orchestrator.
Capture Documentation service	This service is needed if you are generating documentation.
Certify Results UI	This service allows you to view detailed Certify results of RPA Orchestrator executions.

When installing Worksoft Portal, use the external URL for the Authentication service, and do not use a localhost. Portal has a discovery service that tells applications like RPA Orchestrator where to look for the Authorization service. If you use a localhost, it will cause the applications to break.

Go to the Worksoft Customer Portal to download the Portal and services.

For more information about installing Worksoft Portal and services, see the *Worksoft Infrastructure Services Installation Guide*.

System Requirements

Before you begin to install RPA Orchestrator, verify that your environment has the needed system requirements. For information about system requirements, see the Worksoft Help Portal.

Configuring Your Application Server

In order to transform your application server into a web server to host RPA Orchestrator, Microsoft® Internet Information Services (IIS) must be installed, and the Server Manager must be configured.

These procedures assume that you have not already configured your IIS. If you have already set up the Roles and Features, verify that the following Role Services on page 13 have been selected.

Adding Roles and Features

The Server Manager allows you to add specific roles and features to your web server that are required for Worksoft products.

To add roles and features to your web server:

1 From the Start menu, select **Server Manager**.

The Server Manager opens.

🚡 Server Manager			- 🗆 X
Server M	anager • Dashboard		🔹 🗊 🏴 Manage Tools View Help
Image: Dashboard Image: Local Server Image: All Servers Image: All Servers Image: File and Storage Services	WELCOME TO SERVER MANAGE	Add roles and features Add other servers to manage Create a server group Connect this server to cloud services	Hide
	File and Storage Services Manageability Events Performance BPA results	1 Image Local Server 1 Image All Servers 1 Image All Servers 1 Image All Servers 2 Services 1 1 1 Image All Servers 1 1 2 Services 1 1 3 Performance 1 1 3 Image All Services 1 1 4 Image All Services 1 1 5 Services 1 1 6 Services 1 1 8 PA results 1 1 6 Services 1 1 7 1 1	1 /2023 14:00

- 2 In the Navigation pane, select **Dashboard**.
- 3 In the Summary Tasks pane, select **Add Roles and Features**.

The Add Roles and Features Wizard opens.

🚘 Add Roles and Features Wizard				×
Before you begin Defore You Begin Installation Type Server Selection Server Roles Features Confirmation Results	This wizard helps you install roles, role services, or features. You determine w features to install based on the computing needs of your organization, such hosting a website. To remove roles, role services, or features: Start the Remove Roles and Features Wizard Before you continue, verify that the following tasks have been completed: • The Administrator account has a strong password • Network settings, such as static IP addresses, are configured • The most current security updates from Windows Update are installed If you must verify that any of the preceding prerequisites have been complete complete the steps, and then run the wizard again. To continue, click Next.	rhich roles, rol	cuments, o	or
	CITCHOUS NEXT		Carlee	

4 Click Next.

The Select Installation Type page opens.

📥 Add Roles and Features Wizard		-		×
Select installation	type	DESTINA	TION SERV	ER
Before You Begin Installation Type Server Selection Server Roles Features Confirmation Results	 Select the installation type. You can install roles and features on a running physical machine, or on an offline virtual hard disk (VHD). Role-based or feature-based installation Configure a single server by adding roles, role services, and features. Remote Desktop Services installation Install required role services for Virtual Desktop Infrastructure (VDI) to create a or session-based desktop deployment. 			020
	< Previous Next > Inst	all	Cancel	

5 Select the **Role-based or feature-based Installation** option.

6 Click Next.

The Select Destination Server page opens.

elect destinati				DESTIN	ATION SER	RVE
elect destinati	on server					
Before You Begin	Select a server or	a virtual hard disk on whic	h to install roles and features.			
Installation Type	Select a serve	r from the server pool				
Server Selection	Select a virtua	I hard disk				
Server Roles	Server Pool					
Features						
Confirmation	Filter:					
Results	Name	IP Address	Operating System			
	1 Computer(s) for	und				_
			ndows Server 2012 or a newer			
			Servers command in Server M tion is still incomplete are not		servers a	ind
	newly-added serv	ers nom which data collect	tion is suit incomplete are not	shown.		

- **7** Select a server.
- 8 Click Next.

The Select Server Roles page opens.

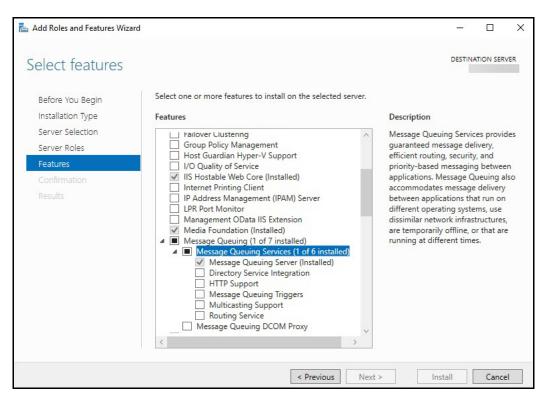
🔁 Add Roles and Features Wizard		– 🗆 X
Select server roles	Select one or more roles to install on the selected server.	DESTINATION SERVER
Before You Begin Installation Type	Roles	Description
Server Selection Server Roles Features Confirmation Results	 Active Directory Federation Services Active Directory Lightweight Directory Services Active Directory Rights Management Services Device Health Attestation DHCP Server Fax Server File and Storage Services (1 of 12 installed) Isile and Storage Services ✓ Storage Services (Installed) Host Guardian Service Hyper-V Network Policy and Access Services Print and Document Services Remote Access Remote Desktop Services Volume Activation Services Windows Deployment Services Windows Server Update Services 	Web Server (IIS) provides a reliable, manageable, and scalable Web application infrastructure.
		xt > Install Cancel

- **9** From the Server Roles list, select the following roles:
 - File Services
 - Web Server (IIS)
- 10 Click Next.

The Select Features page opens.

📥 Add Roles and Features Wizard			- 🗆 X
Select features			DESTINATION SERVER
Before You Begin Installation Type Server Selection Server Roles Features Confirmation Results	Select one or more features to install on the selected se Features Image: NET Framework 3.5 Features Image: NET Framework 4.8 Features (Installed) Image: Background Intelligent Transfer Service (BITS) Image: Background Intelligent Transfer Service (BITS) Image: BitLocker Drive Encryption BitLocker Drive Encryption BitLocker Network Unlock BranchCache Client for NFS Containers Data Center Bridging Direct Play Enhanced Storage Failover Clustering Group Policy Management Host Guardian Hyper-V Support I/O Quality of Service Image: IIS Hostable Web Core (Installed) Internet Printing Client IP Address Management (IPAM) Server LPR Port Monitor	erver.	Description .NET Framework 4.8 provides a comprehensive and consistent programming model for quickly and easily building and running applications that are built for various platforms including desktop PCs, Servers, smart phones and the public and private cloud.
	< Previous	Ne	xt > Install Cancel

- **11** Select the following features:
 - .NET Framework 4.8 Features and all of its child nodes
 - WCF Services and all of its child nodes
 - IIS Hostable Web Core and Media Foundation



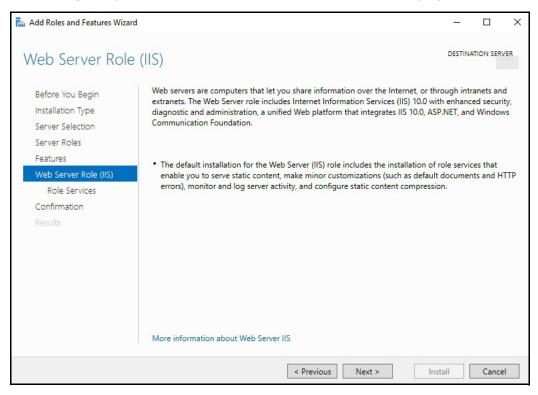
12 Verify that Message Queuing Services and Message Queuing Server are enabled.

- **13** Use the scroll bar to verify the **Windows Process Activation Service** is enabled with the following child nodes:
 - Process Model
 - Configuration APIs
- 14 Click Next.

Configuring the Web Server Role (IIS)

The Web Server Role (IIS) page opens if you have not already installed the web server.

1 In the Navigation pane, click **Role Services** under Web Server Role (IIS).



The Select Role Services page opens.

2 In the Role Services list, use the scroll bar to select the following services.

If you have already set up the Roles and Features, verify that the following services have been selected.

Node	Child Nodes
Common HTTP Features	Default Document
	Directory Browsing
	HTTP Errors
	Static Content
	WebDAV - Verify that this option is disabled. Worksoft's RESTful Services will not work correctly if enabled.
Health and Diagnostics	HTTP Logging
	Request Monitor
Performance	Static Content Compression
	Dynamic Content Compression
Security	Request Filtering
	Basic Authentication
Application Development	.NET Extensibility 4.8
	Application Initialization
	ASP
	ASP.NET 4.8
	CGI
	ISAPI Extensions
	ISAPI Filters
	WebSocket Protocol
Management Tools	IIS Management Console
	IIS Management Scripts and Tools
	Management Service

3 Click Next.

The Confirm Installation Selections page appears.

4 Click **Install** to install the role services.

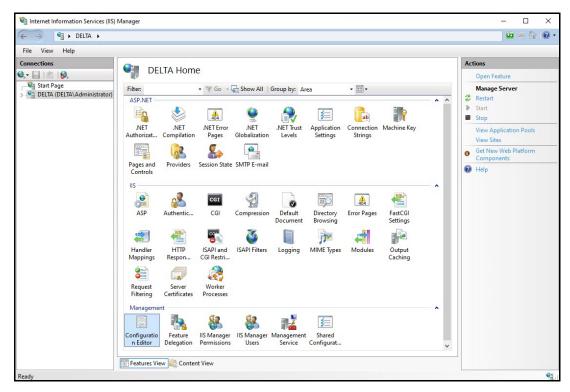
Configuring Application/Json MIME Type Compression

After you have enabled Dynamic Content Compression within IIS, you need to verify HTTP Compression for the application/json MIME type. Worksoft uses Dynamic Content Compression to improve performance, and HTTP compression must be enabled for the application/json MIME type.

When the Dynamic Content Compression feature is enabled, it will overwrite any previous HTTP compression settings.

To verify application/json MIME type compression:

- 1 Open **IIS Manager**.
- 2 In the left Navigation pane, click on your server.
- 3 In the Management section, double-click the **Configuration Editor**.



The Configuration Editor opens.

4 From the Section drop-down list, select **system.webServer > httpCompression**.

Configuration Editor		Actions
Section: appSettings	•	B¢ Apply B _K Cancel
V Dec	^	Generate Script
(Col e tracing file webday	nt=0)	Configuration Search Configuration
-/ applicationInitialization -/ asp		Section Cock Section
-/ caching -/ cgi -/ defaultDocument		'(Collection)' Element
—/ directoryBrowse —/ fastCgi		Edit Items
f globalModules Andlers Ahndlers AhttpCrompression AhttpCrors AhttpLogging Ahttplogging AhttpProtocol AhttpPrediced AhttpPrediced AnttpPrediced Anttp		Help
(Collect / odbcLogging / serverRuntime / serverSideInclude		

5 In the httpCompression section, click **dynamicTypes**.

Configuration Editor			R Apply
ction: system.webServer/httpCompression	•		Bx Cancel
Deepest Path: MACHINE/WEBROOT/APPHOS	T	^	denerate Script
(Collection)	(Count=1)	- 111	Configuration
cacheControlHeader	max-age=86400	- 11 1	Search Configuration
directory	%SystemDrive%\inetpub\temp\IIS Temporary Compressed Files	- 11	Section
doDiskSpaceLimiting	True	- 11 1	
dynamicCompressionBufferLimit	65536	- 11 1	Lock Section
dynamicCompressionDisableCpuUsage	90	- 11 1	'dynamicTypes' Bement
dynamicCompressionEnableCpuUsage	50		
dynamicTypes	(Count≃5)		Lock Element
expiresHeader	Wed, 01 Jan 1997 12:00:00 GMT	_	X Remove
maxDiskSpaceUsage	100		Edit Items
minFileSizeForComp	2700		Help
noCompressionForHttp10	True	- 11	- Hop
noCompressionForProxies	True		
noCompressionForRange	True		
sendCacheHeaders	False	- 11	
staticCompressionDisableCpuUsage	100		
staticCompressionEnableCpuUsage	50		
staticCompressionIgnoreHitFrequency	False		

6 Verify that **application/json** is listed in the dynamic compression mime types. If it is not listed, click the **Add** button in the Collection section to add it.

Collection Editor - system.we	bServer/ht	tpCompression/dynamicTypes/			i X
Items:				Actions	
mimeType text/* message/* application/x-javascript	True True	Entry Path MACHINE/WEBROOT/APPHOST MACHINE/WEBROOT/APPHOST MACHINE/WEBROOT/APPHOST		Collection Add Clear All	8
application/javascript	True	MACHINE/WEBROOT/APPHOST		Item Properties	
/	False	MACHINE/WEBROOT/APPHOST		Lock Item X Remove	
4			>	Help Online Help	
Properties:					
enabled mimeType		≈ True F application/json			
enabled Data Type:bool					

 After you completed your verification or addition, click the Close button The Configuration Editor opens.

Configuration Editor			The changes have be successfully saved.	een
Deepest Path: MACHINE/WEBROOT/APPHO		•	Actions	
(Collection)	(Count=1)	-	By Apply	_
cacheControlHeader	max-age=86400		Be Cancel	
directory	%SystemDrive%\inetpub\temp\IIS Temporary Compressed Files			_
doDiskSpaceLimiting	True		Generate Script	_
dynamicCompressionBufferLimit	65536		Configuration	
dynamicCompressionDisableCpuUsage	90		Search Configuration	S
dynamicCompressionEnableCpuUsage	50		Section	
dynamicTypes	(Count=6)		Lock Section	
expiresHeader	Wed, 01 Jan 1997 12:00:00 GMT			
maxDiskSpaceUsage	100		'dynamicTypes' Element	t
minFileSizeForComp	2700		Lock Element	
noCompressionForHttp10	True		X Remove	
noCompressionForProxies	True			
noCompressionForRange	True		Edit Items	_
sendCacheHeaders	False		😧 Help	
staticCompressionDisableCpuUsage	100			
staticCompressionEnableCpuUsage	50	1000		
staticCompressionIgnoreHitFrequency	False	~		
lynamicTypes				

- 8 Click **Apply** to apply your changes.
- **9** Verify that dynamicTypes lists a count of six.
- **10** Close the editor.

Enabling IIS Services

You will now need to verify that several IIS services are enabled.

To verify IIS services are enabled:

1 If the Server Manager is not open, select **Administrative Tools > Server Manager** from the Start menu.

The Server Manager opens.

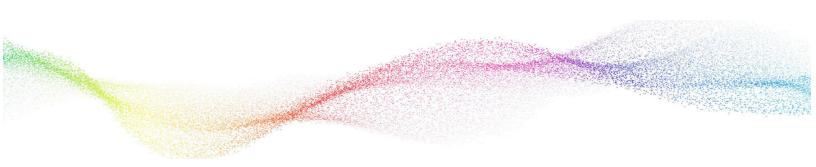
- 2 In the Navigation pane, select **IIS**.
- **3** Scroll down to the Services section.
- 4 In the Services pane, verify that the following services are enabled and running:
 - World Wide Web Publishing Service
 - Web Management Service
 - Application Host Helper Service
 - Windows Process Activation Service
- **5** If any of these window services are not running, start the services.

To start a service, select the service from the list and click **Start** in the right menu. You can also start services by going to **Administrative Tools > Services** on your machine.

Configuring HTTPS on Your Application Server

Complete the following tasks to configure HTTPS on your application server:

- Request an SSL Certificate from your IT department.
- Add the certificate to IIS.
- Add new binding to port 443.
- Verify your SSL Settings on your application server.



Chapter 2 Installing Worksoft RPA Orchestrator

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Verifying System Requirements

Before you begin to install Worksoft RPA Orchestrator, verify that your environment has the needed system requirements. For information about system requirements, see the Worksoft Help Portal.

Installing Worksoft Orchestrator

After you have configure your application server, you are now ready to install Orchestrator on your server.

To install Orchestrator:

1 In the software distribution folder, right-click the **Worksoft Orchestrator (version).exe** file and select **Run as administrator**.

The Worksoft RPA Orchestrator Install Wizard opens.



2 Click **Next** to begin the installation process.

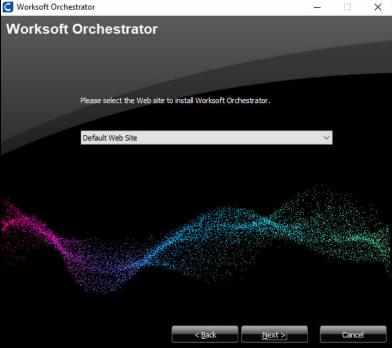
The Destination Folder page appears.

C Worksoft Orchestrator	in an in the state of the	2 —		×	
Destination Folder					
Worksoft Orchestrator will be installed	l inside the folder displayed below.				
Maker.					
Hall Margine .	and the second second second second			Sunday.	
			and the		
	Available Disk Space: 16,304 MB				
	Required Disk Space:				
	44,840 KB				
C:\Program Files (x86)\Worksoft\Orcl	hestrator				
Microsoft.NET				~	
Windows Defender					
Windows Mail					
Windows Media Player					
Windows Multimedia	a Platform				
windows nt					
Windows Photo Viewer					
Windows Portable D					
WindowsPowerShel				~	
	< <u>B</u> ack <u>Next ></u>		Cancel		

3 If you want to accept the default directory for your installation files, click **Next**.

If you do not want to accept the default directory for the installation files, select a different installation directory and click **Next**.

The Orchestrator Web Site page appears.



- 4 If you want to accept Default Web Site as your website, click **Next**.
- **5** If you have other websites configured in the IIS, select the server from the drop-down list and click **Next**.

Worksoft Orchestrator

Please enter your Portal URL. (http://<portalservername>/Portal

http://Alohomora/Portal

Keak

The Worksoft Portal URL page appears.

6 Enter the Worksoft Portal URL.

By default, the URL address is populated as http://servername. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it to https://two.org. You will need to change it

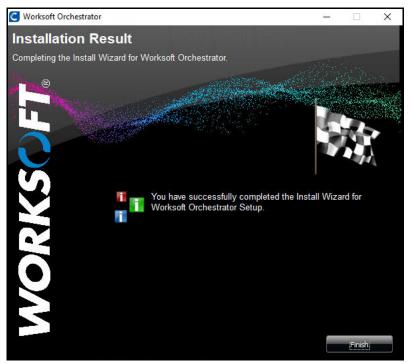
7 Click Next.

The Ready to Install page appears.

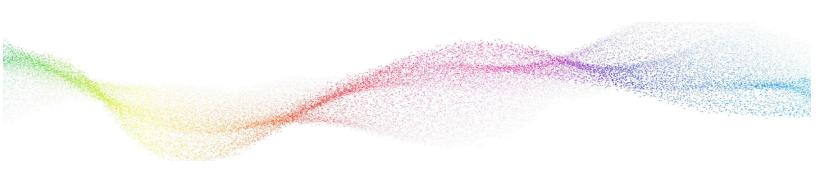
C Worksoft Orchestrator		<u> 1</u>		×
Ready to Install				
The Install Wizard is now ready to	configure Worksoft Orchestrator on this	s computer.		
	Important Please close all running programs before you start the installation.	*		
→	Click "Install" to install Worksoft Orch	nestrator nov	N. 8	
⇒	Click "Back" to review or revise your i	nstallation s	ettings.	
→	Click "Cancel" to exit.			
	< Back		Cancel	

8 Click **Install** to begin the installation.

After the installation completes, the Installation Result page appears.



9 Click Finish.



Chapter 3

Creating the Worksoft RPA Orchestrator Database

In This Chapter

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Overview

After installing Worksoft RPA Orchestrator, you need to create an Orchestrator database in the Worksoft Portal. Go to the Worksoft Portal URL address that was used during installation:

https://<portalservername>/portal

Example: https://servername.worksoft.com/portal

If you have any questions about your specific URL address, please ask your IT administrator.

Creating an Orchestrator Database

In order to create a database, the user must have SQL Server dbcreator permissions.

To create the Orchestrator database:

- **1** Sign into the Worksoft Portal.
- 2 From the Worksoft Portal menu, select **Product Configuration > Orchestrator**.

The Orchestrator Database Connection Setup screen opens.

SQL Server	SQL Username
wsengsql2019	CertifyTester
Database Name	SQL Password
Yoda_Orch	•••••
	Save

You will notice that Orchestrator appears as registered. When you installed Orchestrator, it was automatically registered in the Worksoft Portal.

If for some reason it does not automatically register, you can trigger the registration by manually loading Orchestrator at the following site:

http(s)://servername/Orchestrator/swagger

- 3 In the SQL Server field, enter the server name.
- 4 In the Database Name field, enter the database name.
- **5** Enter the SQL Server user name and password in the respective fields.
- 6 Click Create Database.
- 7 Refresh the screen to display the configured database.



Chapter 4 Installing Worksoft RPA Orchestrator Agents

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Installing an Orchestrator Agent

The Worksoft RPA Orchestrator leverages dedicated remote machines with Worksoft Orchestrator Agent installed on them, and these machines are used by digital workers to run robotic tests. Orchestrator Agent machines are dynamically created by installing Orchestrator Agent onto a remote machine.

Before you install Orchestrator Agent to a remote machine, verify that your machine has the essential system requirements. For more information, see the Worksoft Help Portal.

Warning: Do not install Orchestrator Agent on a machine that has Worksoft Execution Manager Agent installed.

To install an Orchestrator Agent:

1 In your software distribution folder, double-click the **Worksoft Orchestrator Agent (version).msi** file.

The Worksoft Orchestrator Agent Setup Wizard opens.

👷 Worksoft Orchestrator Ag	jent Setup	_2%		×	
	Welcome to the Worksoft Orchestrator Agent Setup Wizard The Setup Wizard will install Worksoft Orchestrator Agent on your computer. Click Next to continue or Cancel to exit the Setup Wizard.				
WORKS()FT.					
	Back	Next	Cano	el	

2 Click Next.

The Destination Folder page appears.

Worksoft Orchestrator Agent Setup			1-1	×
Destination Folder				
Click Next to install to the default folde	r or click Change to ch	oose another.	RKS	JFI
Install Worksoft Orchestrator Agent to:				
C:\Program Files (x86)\Worksoft\Orche	stratorAgent\			
Change				

3 If you want to accept the default directory for your installation files, click **Next**.

If you do not want to accept the default directory for the installation files, click the **Change** button to select a different installation directory, and then click **Next**.

The Configuration Settings page appears.

Worksoft Agent Configuration Settings	×
Configuration Settings Entering configuration settings is optional.	WORKS()FT.
Tenant Name:	
[Engineering]	
Back	<u>N</u> ext Cancel

- **4** In the Tenant Name field, enter a valid tenant name in the Worksoft Portal. Each Agent can be assigned to only one tenant.
- **5** In the Concurrent Logon Count field, enter a number. If an invalid value is added, it will default to one.
- 6 Click Next.

The Worksoft Portal URL page appears.

🗑 Worksoft Orchestrator Agent - Portal URL (Optional)	×
Portal URL	
Entering Portal URL is optional.	
Enter URL:	
(e.g. http:// <server_name>/Portal)</server_name>	
1	
Test Connection	
<u>B</u> ack <u>N</u> ext	Cancel

7 Enter the Worksoft Portal URL.

By default, the URL address is populated as http://<servername>. You will need to change it to https for secure authentication.

- 8 Click **Test Connection** to test the connection.
- 9 Click Next.

The Ready to Install page appears.

聞 Worksoft Orchestrator Agent Setup	_27		×
Ready to install Worksoft Orchestrator Agent	wo	RKS	OFT.
Click Install to begin the installation. Click Back to review or ch installation settings. Click Cancel to exit the wizard.	ange any of yo	our	
Back	<u>Install</u>	Can	cel

10 Click **Install**.

The Completed Installer Setup Wizard page appears.

🕷 Worksoft Orchestrator Age	nt Setup	_23		×	
	Completed the Worksoft Orchestrator Agent Setup Wizard				
	Click the Finish button to exit the Setup Wizard.				
WORKS()FT.					
	Back	Finish	Canc	el	

11 Click Finish.

The Worksoft Orchestrator Agent installation is complete, and it will start by default.

Repeat this installation process for all of the client machines that you intend to use.

Configuring Orchestrator Agents

The desktop machine where Orchestrator Agent is installed needs to have Remote Desktop Protocol (RDP) configured.

If you have a Citrix environment, the Citrix server must be configured to support RDP sessions. Test your configuration by running **mstsc.exe**. This configuration setting is not enabled by default.

Disabling Windows Fast User Switching Mode

Orchestrator Agents require the ability to enter a user name and password on the screen. If the login screen displays a Switch User button, then the Agent will not start. Consult your IT administrator about disabling the Fast User Switch mode in the Local Group Policy Editor.

To disable Windows Fast User Switch mode:

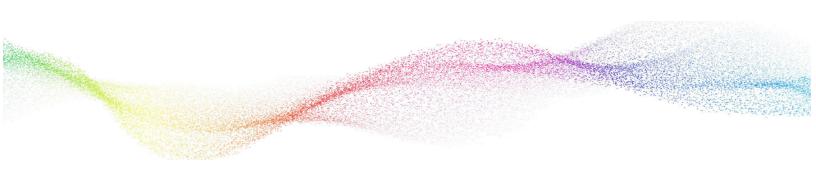
1 From the Windows Start menu, type gpedit.msc, and press Enter.

The Local Group Policy Editor opens.

- 2 In the Local Group Policy Editor Navigation pane, drill down and select **Computer Configuration >** Administrative Templates > System > Logon.
- 3 In the Setting pane, double-click **Hide entry points for Fast User Switching**.

The Properties dialog box for this setting opens.

- 4 Select the **Enabled** option.
- 5 Click OK.



Appendix A Worksoft RPA Orchestrator Silent Installation

Install with all defaults:

Install on default path C:\Program Files (x86)\Worksoft: <InstallerPath>\WorksoftOrchestrator.exe /s

Provide Non-default website:

<InstallerPath>\WorksoftOrchestrator.exe /s

Provide portal URL during silent install:

https://<portalservername>/portal /s
Example: https://servername.worksoft.com/portal /s

Provide default install location override:

<InstallerPath>\WorksoftOrchestrator.exe /s TargetDir="C:\Temp\"

Provide Install log location override:

The default installation log is located at **%userprofile%** of the user who installed Worksoft RPA Orchestrator. <InstallerPath>\WorksoftOrchestrator.exe /s /l=C:\temp\OrchestratorInstalllog.txt

Silent Uninstall:

WorksoftOrchestrator.exe /s MODIFY=FALSE REMOVE=TRUE UNINSTALL=YES