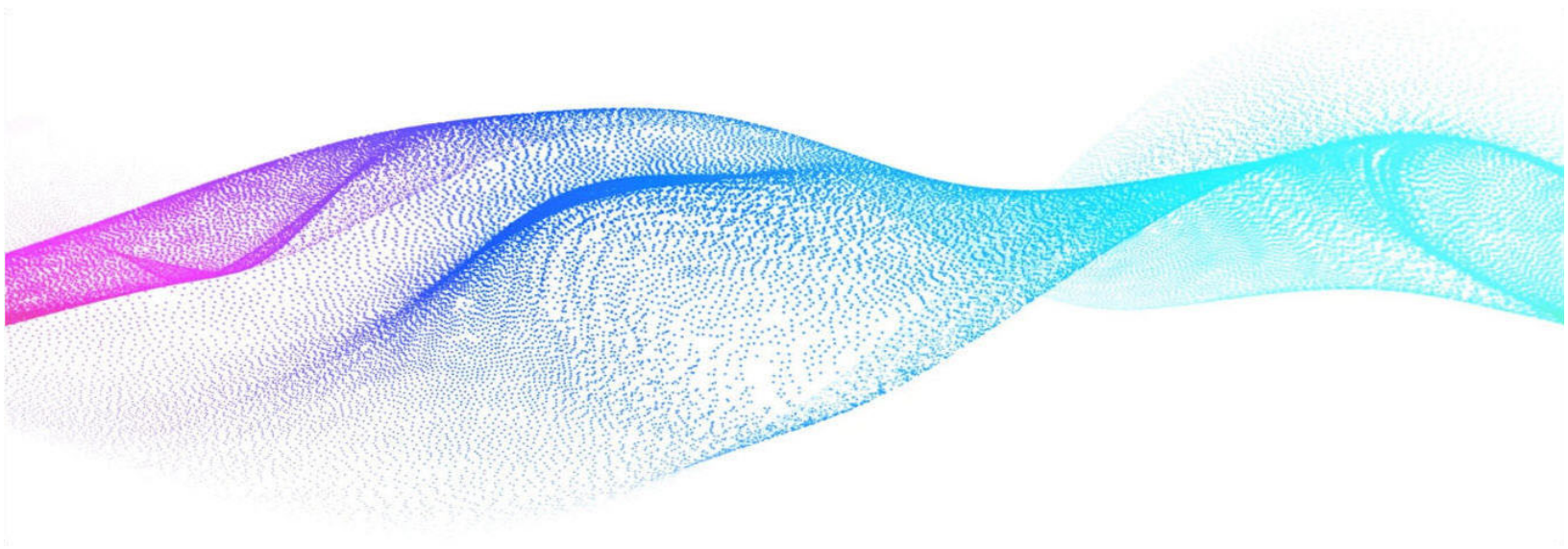




Worksoft Automation Insights Installation Guide

Worksoft Automation Insights Installation Guide

Version 1.0

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Chapter 1 Installing Worksoft Automation Insights

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Overview

This document provides information on how to install and configure Worksoft Automation Insights. The installation package contains the following components:

Component	Description
AutomationInsightsDatabaseScripts Folder	This folder contains database scripts that create and upgrade the Worksoft Automation Insights database. You can install the Automation Insights database on the same server as your Certify database.
WorksoftAutomationInsights.exe	This executable installs Worksoft Automation Insights. You can install Worksoft Automation Insights on the same application server where Certify Services and the Continuous Testing Manager (CTM) are installed.

To install Worksoft Automation Insights, you must complete the following steps:

- ◆ Verify system requirements.
- ◆ Create a Worksoft Automation Insights database on a supported SQL Server.
- ◆ Install Worksoft Automation Insights.
- ◆ Add the Worksoft Automation Insights license file to the AutomationInsights folder.
- ◆ Configure the Worksoft Automation Insights database connection.
- ◆ Configure the Certify database connection.

System Requirements

Worksoft Automation Insights must be installed in an on-premises environment and hosted locally. Automation Insights can not be installed on a cloud server.

Before you begin to install Worksoft Automation Insights, verify that your environment has the following system requirements installed:

Component	Requirement
Supported Operating Systems	Windows® Server Standard and Enterprise Versions: • 2025 • 2022 • 2019
CPU	4 CPUs @ 3.0 GHz
RAM	4 GB

Component	Requirement
Disk Space	200 MB
Third-Party Software	• Microsoft® Internet Information Services (IIS) v10 and later versions • ASP.NET Core 8.0. - Windows Hosting Bundle • Google Chrome® or Microsoft Edge® • SSL certificate
Database Server	Microsoft® SQL Server Versions: • 2025 • 2022 • 2019

Creating a Worksoft Automation Insights Database

Before you install Worksoft Automation Insights, you must create an Automation Insights database.

► **To create an Automation Insights database:**

- 1 From the distribution folder, locate the **Apply.exe** utility:

AutomationInsightsDatabaseScripts(version).zip\AutomationInsightsDatabaseScripts\
AutomationInsightsDatabase

- 2 Double-click **Apply.exe**.

The Apply utility opens.

- 3** In the Database Server field, enter the database server name.
- 4** In the Database Name field, enter a unique database name.
Example: AutomationInsights
- 5** Select the **Trust Server Certificate** option to use an automatic certificate.
By choosing this option, the client trusts the certificate the server provides. By default, the SQL Server automatically installs a self-signed certificate that can be used by default. However, some organizations may want to install a custom certificate.
- 6** If you selected to use Windows authorization or SQL Server authorization, you must select the **Encrypt** option.
A certificate must be installed on the SQL Server to encrypt the communication channel from the Certify API to the SQL Server database.
- 7** Select one of the following authentication modes:
 - **Windows**
 - **SQL Authentication**If you selected Windows authentication security, go to **Step 9**.
- 8** If you are using SQL Server database authentication, enter the username and password in the respective fields.
Users who are using SQL Server authentication must have permissions to create, update, and delete databases.
- 9** Click **Start** to begin creating your database.
- 10** After the database is created, verify that you can see it in the SQL Server Management Studio.

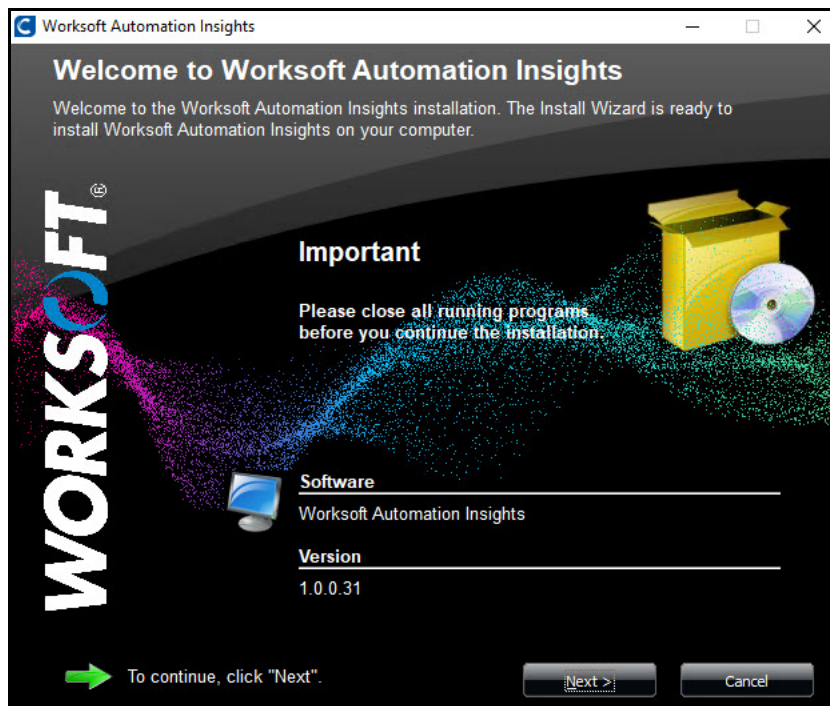
Installing Worksoft Automation Insights

After verifying that your environment meets the required system requirements and the Worksoft Automation Insights database has been created, you are ready to install Worksoft Automation Insights.

► **To install Worksoft Automation Insights:**

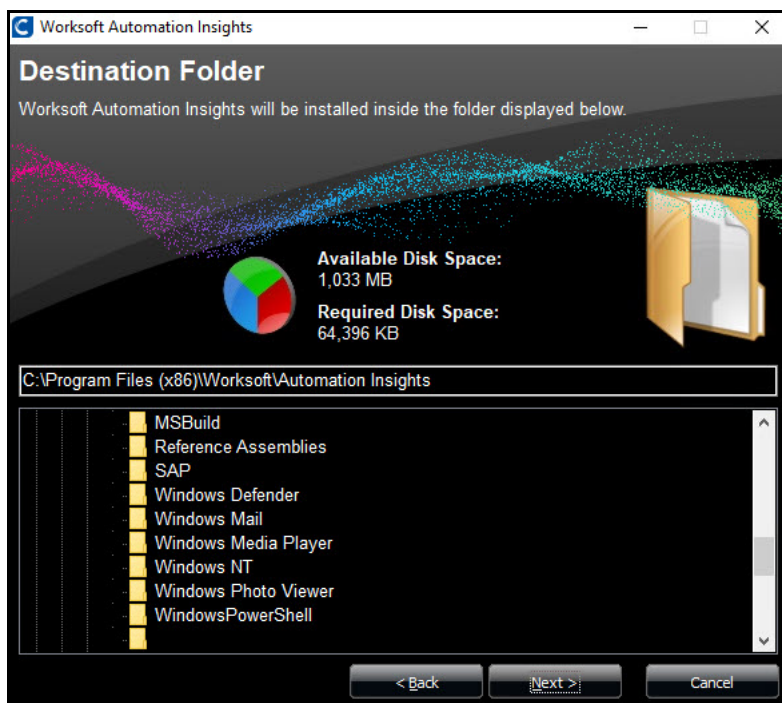
- 1 In the software distribution folder, right-click the **WorksoftAutomationInsights (version).exe** and select **Run as administrator**.

The Worksoft Automation Insights Install Wizard opens.



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

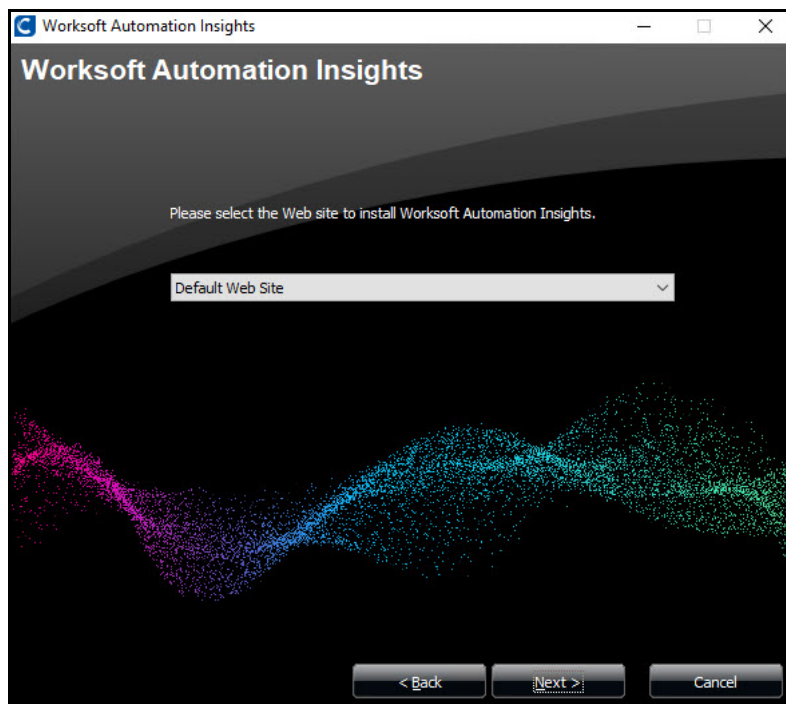
The Destination Folder page opens.



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

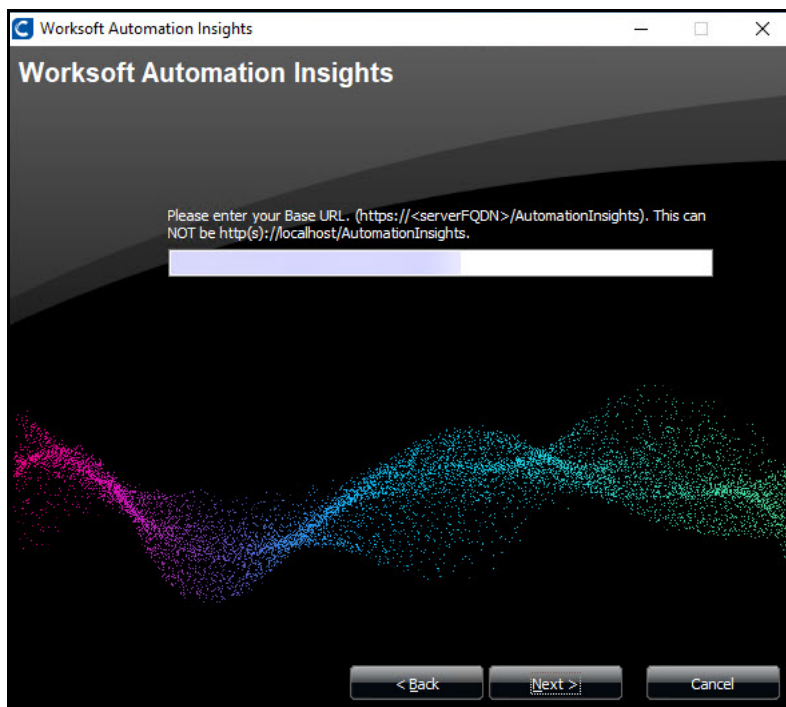
If you do not want to accept the default directory for the installation files, select a different installation directory and click **Next**.

The Worksoft Automation Insights Web Site page opens.



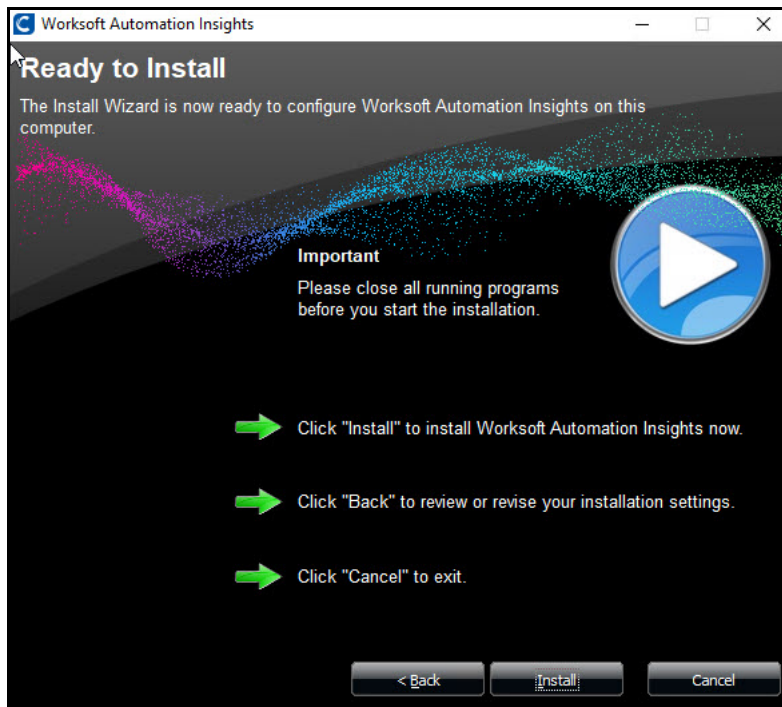
- 4 If you want to accept Default Web Site for your website configured in the IIS, click **Next**.
If you have other websites configured in the IIS, select the server from the drop-down list and click **Next**.

The Ready to Install page opens.



- 5 Click **Install** to begin installing Automation Insights.

After the installation completes, the Installation Complete page opens.



- 6 Click **Finish**.
- 7 After Worksoft Automation Insights is installed, open IIS and verify you can see **Worksoft Automation Insights** in the Application Pools tab.

Adding the Worksoft Automation Insights License File

You must add the Worksoft Automation Insights license JSON file to the following folder:

<Drive>:\Program Files (x86)\Worksoft\AutomationInsights

Example: C:\Program Files (x86)\Worksoft\AutomationInsights

After you install Automation Insights, verify that you can sign in to the Automation Insights application.



Chapter 2

Connecting Worksoft Automation Insights to Databases

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Connecting to the Worksoft Automation Insights Database

After you install Worksoft Automation Insights, you must connect it to the Automation Insights database. You must have read and write permissions to the SQL Server database.

► **To connect to the Automation Insights database:**

- 1 Open your Automation Insights website:

`https://<fully-qualified-domain-name>/AutomationInsights`

Example: `https://servername.worksoft.com/AutomationInsights`

The Connect to Automation Insights Database page opens.

Note: If you launch Automation Insights and receive a 404 error, verify you can see **Automation Insights** in the Application Pools tab in Microsoft Internet Information Services (IIS).

- 2 Enter the following Automation Insights database information:

- Database server name
- Automation Insights database name
- Database username
- Database password

- 3 Click the **Test** button to confirm the database connection works.

A message opens stating whether the connection was successful or failed.

If the connection attempt fails, an error appears explaining why the database is not connecting, and you must troubleshoot the connection.

If the connection is successful, the **Save** button is enabled.

- 4 Click **OK** to close the message.

- 5 Click the **Save** button to store the connection details.

The Automation Insights sign-on page opens.

Connecting to the Certify Database

In Automation Insights, you must add and configure Certify databases in the Worksoft Databases tab. You must have read-only access to the Certify databases. No changes are made to these databases.

Only Automation Insights administrators can access and configure the following windows:

- ◆ Worksoft Databases
- ◆ User Management
- ◆ Automation Insights Databases

► **To connect to a Certify database:**

- 1 Sign in to Automation Insights with the following default credentials:

- Username: `admin@worksoft.com`
- Password: `password`

Note: After signing in to Automation Insights and connecting to the Certify database, you must change the username and default password. For more information, see [Chapter 4, "Updating the Default User's Password,"](#) on page 21.

- 2 In the Navigation pane, click **Worksoft Databases**.

The Worksoft Databases window opens.

3 Click **Add Database**.

The Worksoft Database/Add Database window opens.

4 Enter the following Certify database information:

- Database server name
- Database name
- Database username
- Database password

- 5** Click **Test** to test the Certify database connection.

A message opens stating whether the connection was successful or failed.

If the connection attempt fails, an error appears explaining why the database is not connecting, and you must troubleshoot the connection.

- 6** Click **OK** to close the message.

- 7** Click the **Save** button to store the connection details.

If saving the database is successful, the **Certify Projects** and **Refresh Schedule** tabs are enabled.

Next, you must add the Certify projects for which you want to report metrics.



Chapter 3

Configuring Worksoft Automation Insights

In This Chapter

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Setting the Refresh Schedule.....	19

Overview

After the Certify database is connected to Automation Insights, the following tabs are enabled in the Worksoft Databases window:

- ◆ Certify Projects
- ◆ Refresh Schedule

Administrators must configure Automation Insights by completing the following tasks:

- ◆ Selecting Certify projects.
- ◆ Setting the refresh schedule for Automation Insights metrics.

Selecting Certify Projects

In the Certify Projects tab of the Worksoft Database window, you must enable the projects you want to use to track, compare, and evaluate the performance of specific processes.

► **To select Certify projects:**

- 1 In the Worksoft Database/Edit Database window, click the **Certify Projects** tab.
The Certify Projects tab opens.

The screenshot shows the 'Worksoft Databases / Edit Database' window with the 'Certify Projects' tab selected. The window has three tabs: 'Database Connection', 'Certify Projects', and 'Refresh Schedule'. A 'Save Changes' button is in the top right. Below is a table with columns: 'ON', 'PROJECTS', 'PROCESS GOLD FOLDER', and 'LAYOUT GOLD FOLDER'.

ON	PROJECTS	PROCESS GOLD FOLDER	LAYOUT GOLD FOLDER
☒	Client Name	Client Name	Client Name
☒	Training	Training	Training
☒	QA Checks		
☐	Test & Test		
☐	Testing COE		

- 2 In the Process Gold Folder column, select a process folder from the drop-down list for each Certify project you want to test.
- 3 If you have gold folders for layouts, select a layout folder from the drop-down list for each Certify project you want to test in the Layout Gold Folder column.
- 4 From the On column, enable the projects you want to report metrics against.

Setting the Refresh Schedule

After you have configured your Certify projects, you are ready to set the Automation Insights testing refresh schedule.

A daily job should be scheduled to inspect the Certify database and update metrics in the Automation Insights database.

► To set the refresh schedule:

- 1 In the Worksoft Database/Edit Database window, click the **Refresh Schedule** tab.
The Refresh Schedule tab opens.

The screenshot shows the 'Worksoft Databases / Edit Database' window with the 'Refresh Schedule' tab selected. The interface includes three tabs: 'Database Connection', 'Certify Projects', and 'Refresh Schedule'. Under the 'Refresh Schedule' tab, there are two sections: 'REPEAT' and 'TIME'. The 'REPEAT' section has a dropdown menu currently set to 'Every Day'. The 'TIME' section has a text input field showing '02:00 AM'. To the right of these fields is a blue 'Save' button with a floppy disk icon. Below these fields is a yellow box titled 'Manual Refresh' containing the text: 'Refresh all active metrics immediately. This can take up to 30 minutes and places additional load on the Certify database.' To the right of this text is a blue 'Refresh Now' button with a circular arrow icon.

- 2 From the Repeat drop-down list, select one of the following options:
 - **Every Day**
 - **Never**
- 3 If you selected **Every Day**, enter the time of day you want to refresh your metrics.
- 4 Click **Save**.

Refreshing Data Automatically

You can refresh all active metrics automatically by clicking the **Refresh Now** button in the Refresh Schedule tab. This refresh operation can take up to 30 minutes and places additional load on the Certify database.



Chapter 4

Configuring Worksoft Automation Insights Users

In This Chapter

Updating the Default User’s Password

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Adding Worksoft Automation Insights Users

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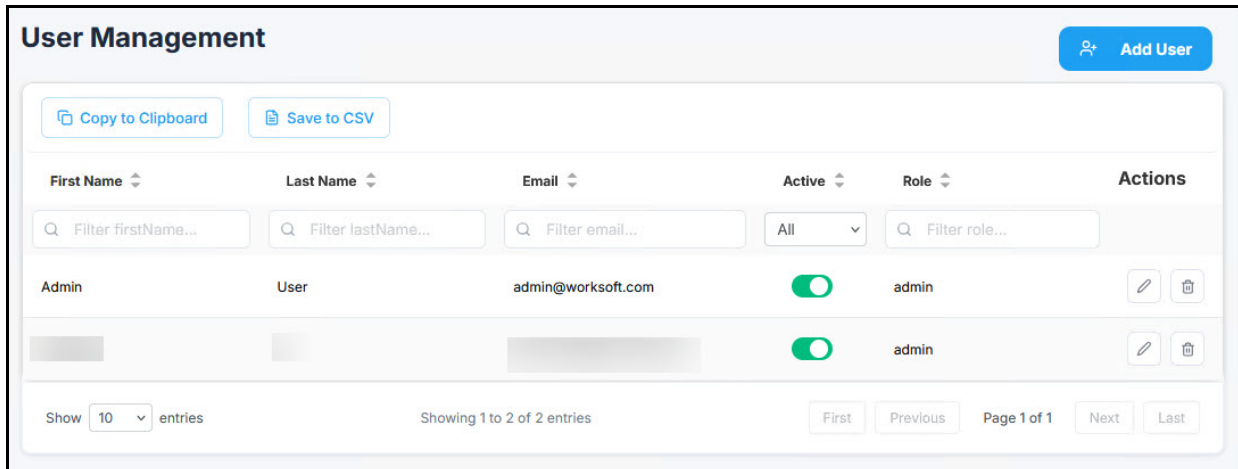
Updating the Default User's Password

The administrator must update the username and password for the default user **admin@worksoft.com** because it is not secure.

► To update a password:

- 1 In the Automation Insights Navigation pane, click **User Management**.

The User Management window opens.



User Management

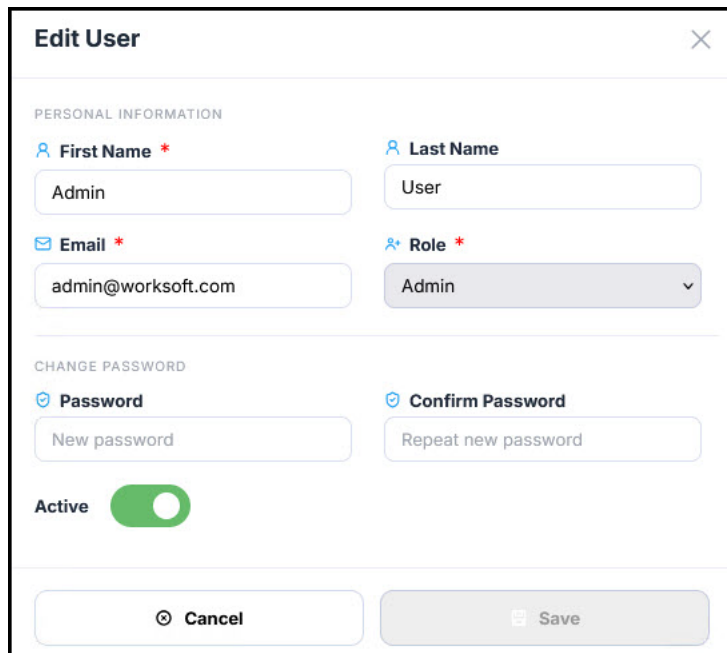
Copy to Clipboard Save to CSV Add User

First Name	Last Name	Email	Active	Role	Actions
Admin	User	admin@worksoft.com	☒	admin	
			☒	admin	

Show 10 entries Showing 1 to 2 of 2 entries First Previous Page 1 of 1 Next Last

- 2 Click the **Edit** button next to the **admin@worksoft.com** user.

The Edit User dialog opens.



Edit User

PERSONAL INFORMATION

First Name * Admin **Last Name** User

Email * admin@worksoft.com **Role *** Admin

CHANGE PASSWORD

Password New password **Confirm Password** Repeat new password

Active ☒

Cancel Save

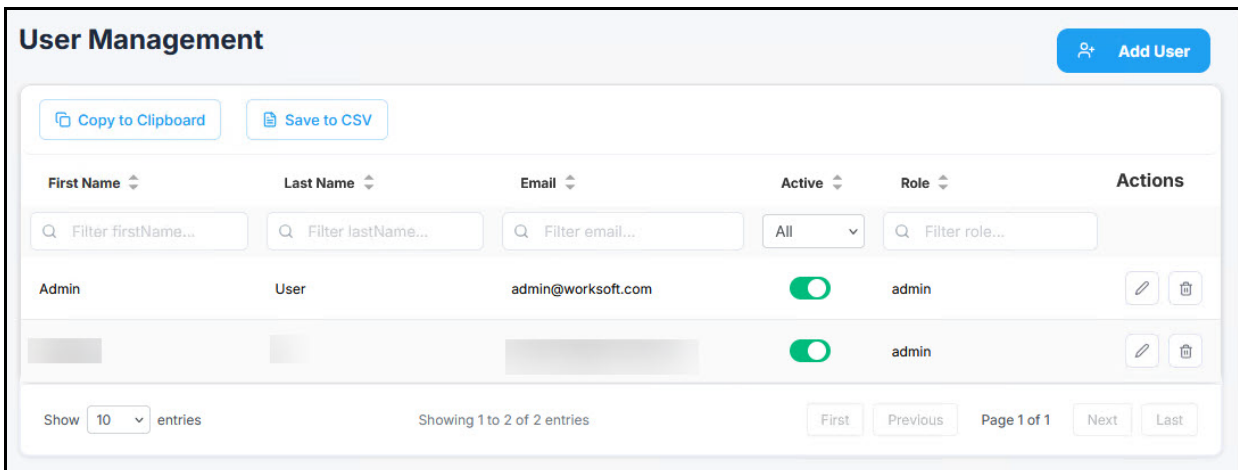
- 3 In the First Name and Last Name fields, enter the name of the user.
- 4 In the Email field, enter an email address for the administrator.
The email address is the Automation Insights username.
- 5 In the Password and Confirm Password fields, enter a new password for the user.
Passwords must consist of the following:
 - A minimum of eight characters long
 - One capital letter
 - One number
 - One special character
- 6 Click **Save** to save your updated user.

Adding Worksoft Automation Insights Users

Only Automation Insights administrators can add new users.

► **To add users:**

- 1 In the Automation Insights Navigation pane, click **User Management**.
The User Management window opens.



- 2 Click **Add User**.

The Add User dialog opens.

- 3 In the First Name and Last Name fields, enter the name of the user.
- 4 In the Email field, enter an email address.
The email address is the Automation Insights username.
- 5 From the Role drop-down list, select one of the following values:
 - **Admin**
An administrator can configure databases, add users, add projects, and set the refresh schedule.
 - **User**
- 6 In the Password and Confirm Password fields, enter a new password for the user.
Passwords must consist of the following:
 - A minimum of eight characters long
 - One capital letter
 - One number
 - One special character
- 7 Click **Save** to save your new user.
The new user appears in the User Management window.
- 8 Repeat this process to add more users.

Editing Automation Insights Users

To edit a user, click the **Edit**  button next to the user you want to edit in the User Management window.

To delete a user, click the **Delete**  button next to the user you want to edit in the User Management window.