

Getting Started With RoboForm Enterprise Console

This document will walk you through the basics of adding users, groups, and RoboForm files (passcards, identities, safenotes) to the RoboForm Enterprise Console. It is intended as a quick-start introduction to the features and functionality of the software.

Navigating The Console

After logging in, you will see the basic RoboForm Enterprise Console screen. It consists of a dialog box on the right and a navigation menu called **Management** on the left. To switch between menus, click any of the links under **Management**.

The screenshot shows the RoboForm Enterprise Console interface. At the top left is the SIBER ENTERPRISE GROUP logo. The top right shows the user 'Console Administrator (SEGConsole_Trial)' and a 'Log Out' button. The main content area is divided into two sections: 'Management' on the left and 'Console Dashboard' on the right. The 'Management' section includes links for Home, Settings, Users, Groups, RoboForm Files, GoodSync Jobs, Reports, and Documentation. Below this is the 'Administrative Tools' section with links for Bulk Import Users, Upload MPR Files, Export RF Data, Bulk Import RF Files, and Features. The 'Console Dashboard' section displays various metrics and status messages, including license information, active users, and sync status. Callouts provide additional context: one points to the top navigation area, another to the license information, a third to the 'Console Dashboard' section, and a fourth to the 'Features' link in the Administrative Tools section.

Main Menu; general console settings, create and edit users, groups, and RoboForm files.

Company license information.

“Console Dashboard” shows any users who are not properly set up. Click “GO” to see unresolved issues.

For more detailed information on RoboForm’s features...

Advanced RoboForm Features

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ENTERPRISE SOLUTIONS: SINGLE SIGN-ON | NETWORK FILE SYNCHRONIZATION | COBOL FILE CONVERSION

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Creating Files

After clicking **RoboForm Files** under **Management**, you should see the following dialog in the right-most box. Since we have no RoboForm files yet (on a fresh install), create one now by clicking **New**.



This is the dialog box to create a **New** RoboForm Enterprise Managed Console **File**:

Edit File Information:

Upload File:	<input type="text" value="C:\Users\WJACKSON\"/> <input type="button" value="Browse_"/>
Sub-Folder:	<input type="text" value="- Sub-Folder -"/> <input type="button" value="Edit"/>
File Name:	<input type="text" value="@RFSS wjackson.rfp"/>
Description:	<input type="text" value="@RFSS wjackson.rfp"/>
Issue Date:	<input type="text" value="10/1/2012"/>
Revoke Date:	<input type="text" value="10/1/2013"/>

Browse to find the file you wish to add.

Distribution settings for this file.

Be sure to **save** when you are finished.

NOTE: If the passcard (or identity, or safenote) is protected, you will be prompted to enter that file's master password after you try to save.

For more on RoboForm, including creating new files and setting a master password, consult <http://www.roboform.com/enterprise/support/user-documentation/enterprise-end-user-guide>

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You should now see the newly created file in the **RoboForm Files** list:

Filter (File Name): Filter

% for Wildcard

File ID	File Name	Description
1	SEG RoboForm Everywhere.rfp	RF Everywhere Account
2	@Siber Webmail.rfp	Siber Webmail
3	@RFSS.rfp	RFSS Account

New

Callouts:
- Edit existing file. (points to edit icons)
- Search existing files. (points to Filter button)
- Create additional files. (points to New button)

The **RoboForm File** has now been recognized by the console and you can apply it to **Groups**, as described in the following section.

Creating Groups

Creating a **Group** in the console works similarly to creating a **RoboForm File**. To create your first **Group**, click **Groups** under **Management**. You should see an empty list. Click **New**. This is the **Group** creation dialog:

Edit Group Information:

Group Name: Group name and description; can be anything you like.

Description:

RoboForm Files (Filter): Filter

% for Wildcard

Console Files:

- @RFSS wjackson.rfp
- @Siber Webmail - wjackson.rfp
- SEG RoboForm Everywhere.rfp

Assigned to Group:

RoboForm files assigned to this group are listed here.

Callouts:
- Highlight the files you want to be part of this group. CTRL+Click to select multiple files at once. (points to Console Files list)
- Use arrow buttons to add/remove selected RoboForm Files from this group. (points to arrow buttons)
- Be sure to save your changes to the group. (points to Save button)

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You should now see the newly created **Group** in the **Groups** list:

Group:

Filter (Group Name): Filter

% for Wildcard

Group ID	Group Name	Description
3	Accounting	Accounting department for Great Northern.
4	Marketing	Marketing department for Great Northern.

New

Annotations:

- Edit existing group. (points to edit icons)
- Search existing groups. (points to Filter button)
- Create additional groups. (points to New button)

Creating Users

Now that you have a **Group** created with **RoboForm Files** in it, we can add some **Users**. Click **Users** under **Management**. Like **RoboForm Files** and **Groups**, **Users** are created in the same fashion. This is the **User** creation dialog:

Edit User Information:

Fields marked with * are required.

* User Name: Must be a valid email address. This must be unique for each user.

* Email: Users will use this password and their email to log in.

* Console Password: Change This user's RoboForm Everywhere account they must sync with to get their files.

Display Name:

Everywhere Account:

Master Password:

RoboForm Status:

Groups (Filter): Filter

Accounting

Marketing Checked groups are assigned to this user.

Administrative Rights :

Report

TemplateBuilder

GSJob

RFFile

Group

User

Company

Administrator Checked boxes are RoboForm console administration privileges assigned to this user.

Save Archive Sync Cancel

Annotations:

- User Name should be the Windows login name for this User. The subsequent field, Display Name, can be anything you like. (points to User Name and Display Name)
- Must be a valid email address. This must be unique for each user. (points to Email)
- Users will use this password and their email to log in. (points to Console Password)
- This user's RoboForm Everywhere account they must sync with to get their files. (points to Everywhere Account)
- Checked groups are assigned to this user. (points to Marketing checkbox)
- Checked boxes are RoboForm console administration privileges assigned to this user. (points to Administrator checkbox)

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You should now see the newly created **User** in the **Users** list:

Your data for user 'Administrator' has been saved.
Users

Filter (User Name): Filter

% for Wildcard

User ID	User Name	Display Name	Email
2	Administrator	Console Administrator	admin@peaks.com
3	Dale	Dale Cooper	dale@peaks.com
4	Harry	Harry Truman	harry@peaks.com

New

Create additional users.

Edit existing user.

Search existing users.

For Additional Information...

For details on the advanced features of the RoboForm Enterprise Console, please consult the **Documentation** page in the **Management** menu.



Console Administrator (SEGConsole_Trial) Log Out

Management

- Home
- Settings
- Users
- Groups
- RoboForm Files
- GoodSync Jobs
- Reports
- Documentation

Administrative Tools

- Bulk Import Users
- Upload MPR Files
- Export RF Data
- Bulk Import RF Files
- Validate RF Files

Welcome to the SEG Enterprise Managed Console

License Information

Company: **SEGConsole_Trial**

- This is a trial License. Please contact SEG to get the Production license file for your organization

- Invalid Company Settings Go

Number of Client Access Licenses: **10**

Expiration Date: **12/21/2012**

[Purchase Additional Licenses](#)

[Send Data to SEG for License File Creation](#)

Console Dashboard Hide

Number of Active Users: **1** (Remaining: **9**)

- **1 Users with Issues*** Go

Number of Active Groups: **0**

Number of Active RoboForm Files: **0**

- **1 Users have never Synced or last Synced more than 7 days ago** Go

- **1 Users do not have an ENP file** Go

Number of Active GoodSync Jobs: **0**

- **1 Users have never Synced or last Synced more than 7 days ago** Go

Number of Recently Run Jobs: **0**

Number of Currently Running Jobs: **0**

* Issues defined as Users not yet assigned to any Group; Groups with no assigned Users / Files / Jobs; Files / Jobs not Assigned to a Group

If you have any suggestions or feedback, please let [Siber Enterprise Group](#) know, so we can add it to an upcoming release.

Page contains download links to all additional RoboForm Console documentation.

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