Getting Started With RoboForm Enterprise Console

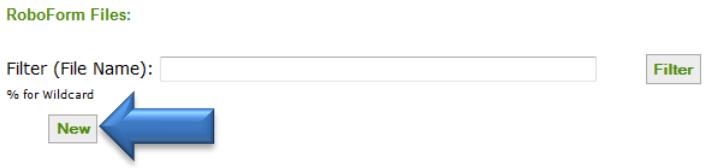
This document will walk you through the basics of adding users, groups, and RoboForm files (passcards, identities, safenotes) to the RoboForm Enterprise Console. It is intended as a quick-start introduction to the features and functionality of the software.

Navigating The Console

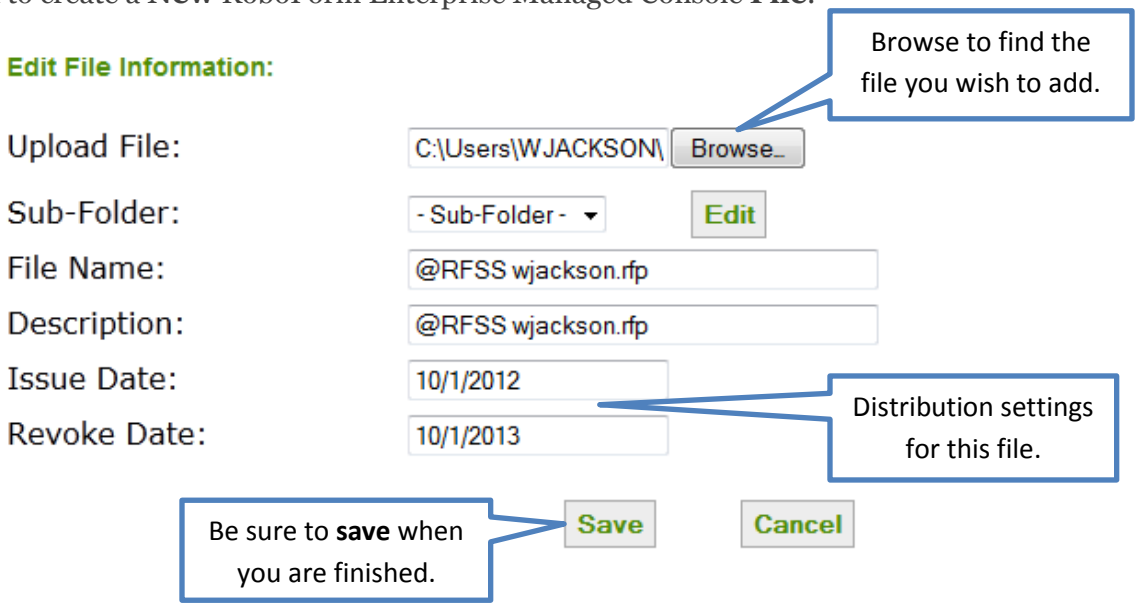
After logging in, you will see the basic RoboForm Enterprise Console screen. It consists of a dialog box on the right and a navigation menu called **Management** on the left. To switch between menus, click any of the links under **Management.**

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.**



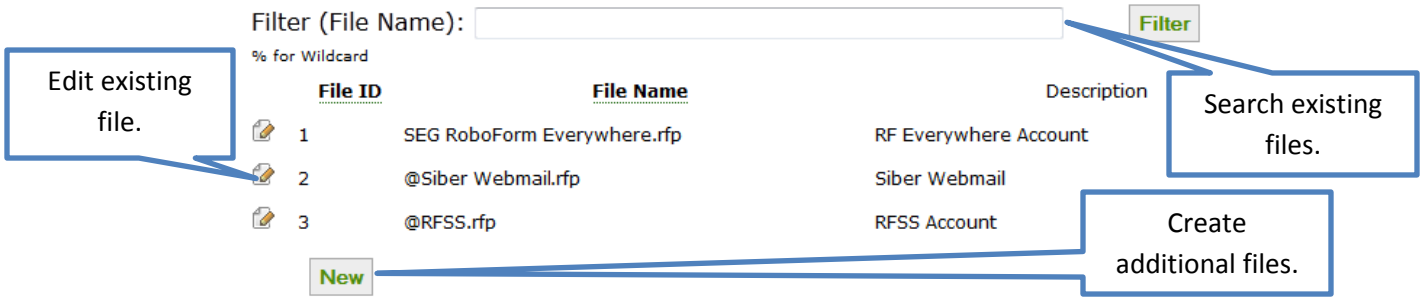
This is the dialog box to create a **New** RoboForm Enterprise Managed Console **File**:



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

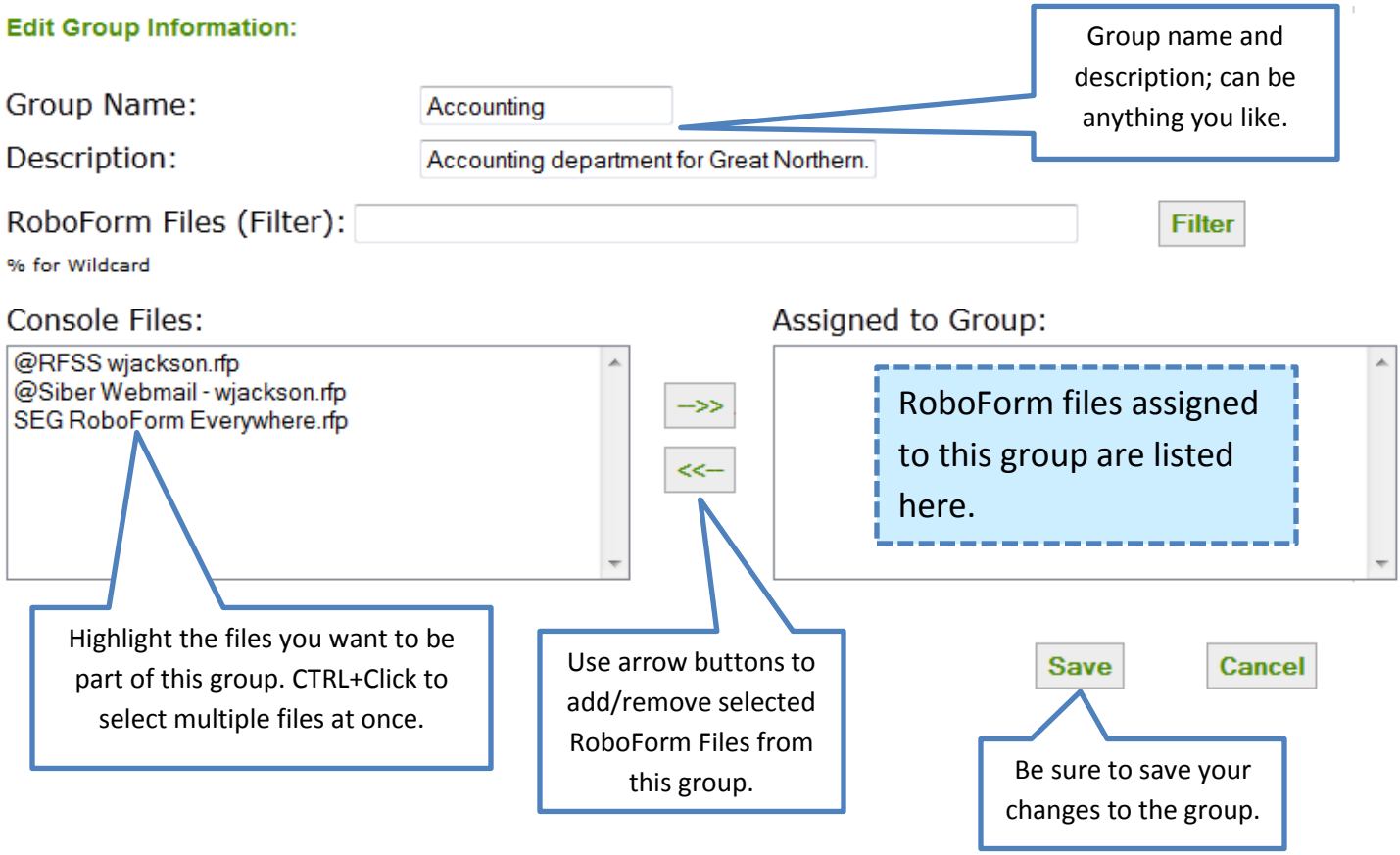
You should now see the newly created file in the **RoboForm Files** list:



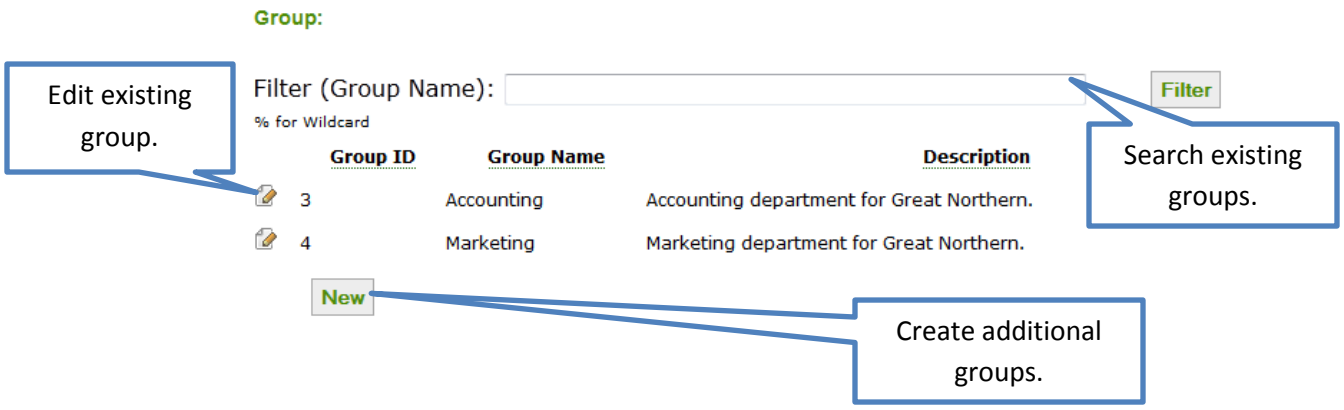
The **RoboForm File** has now been recognized by the console and you can apply it to **Groups**, as described in the following section.

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:

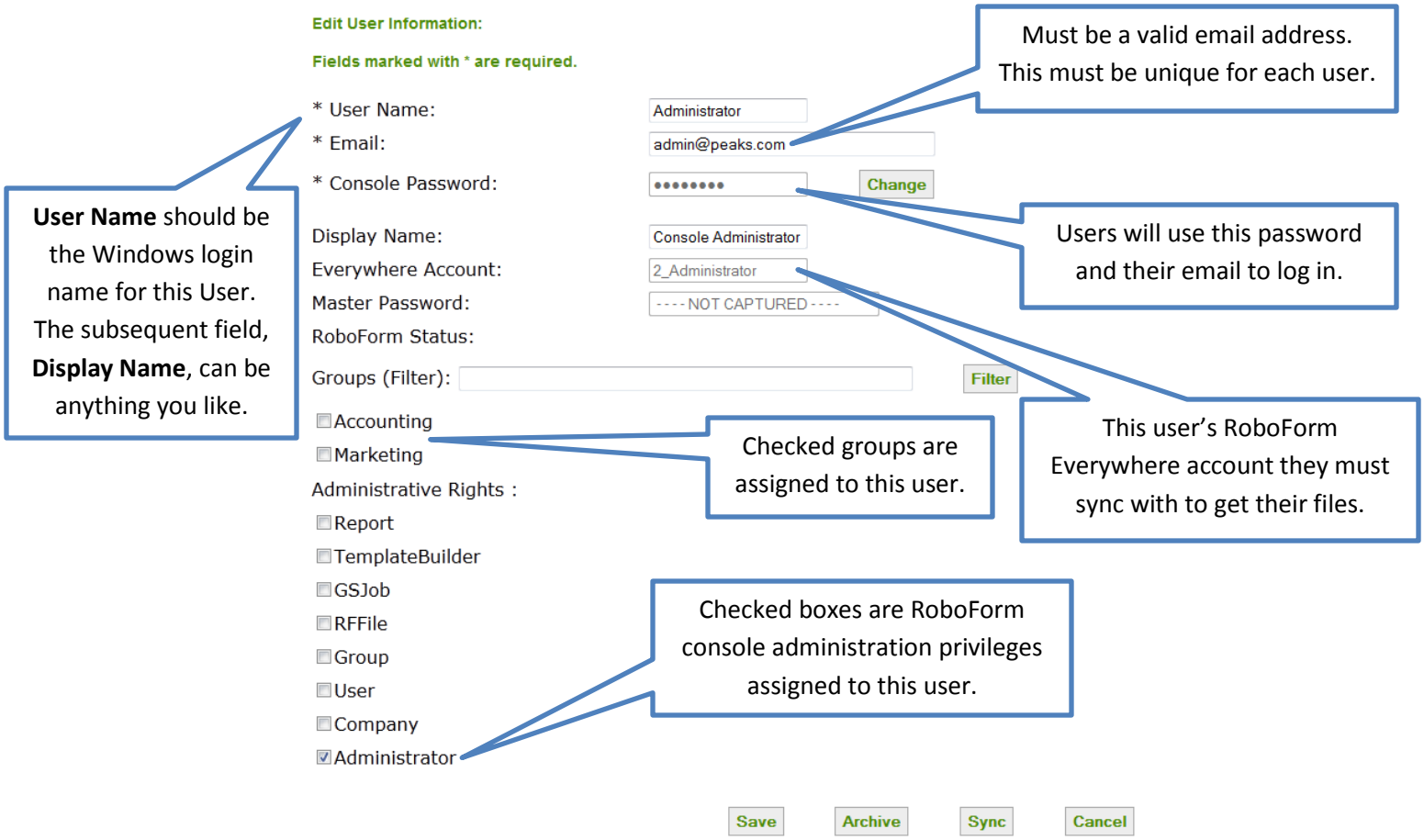


You should now see the newly created **Group** in the **Groups** list:

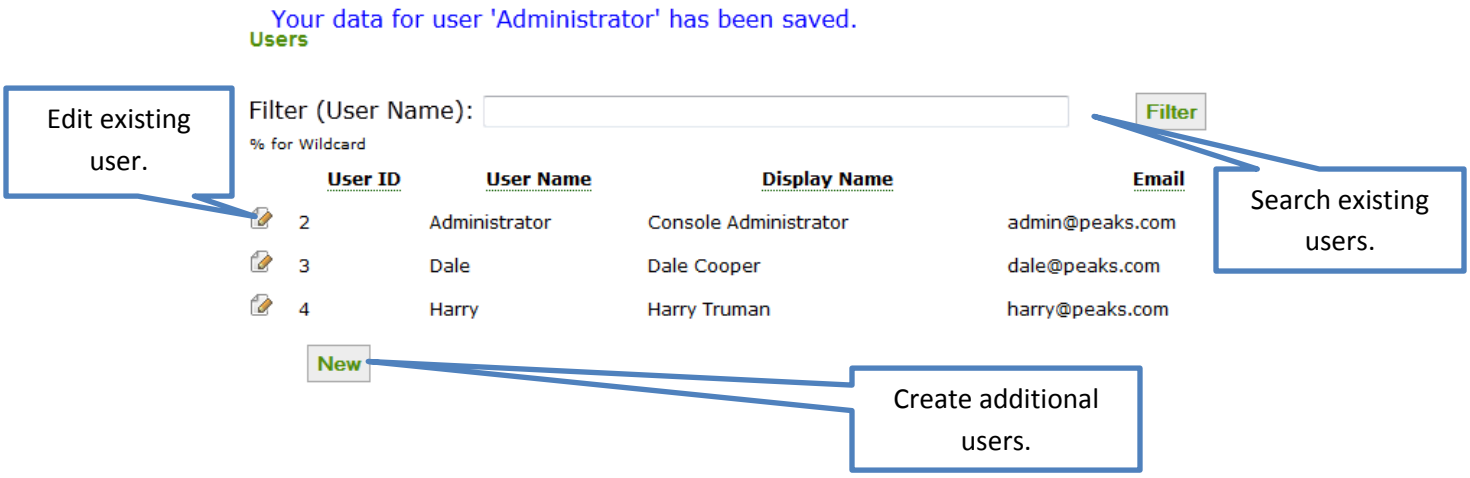


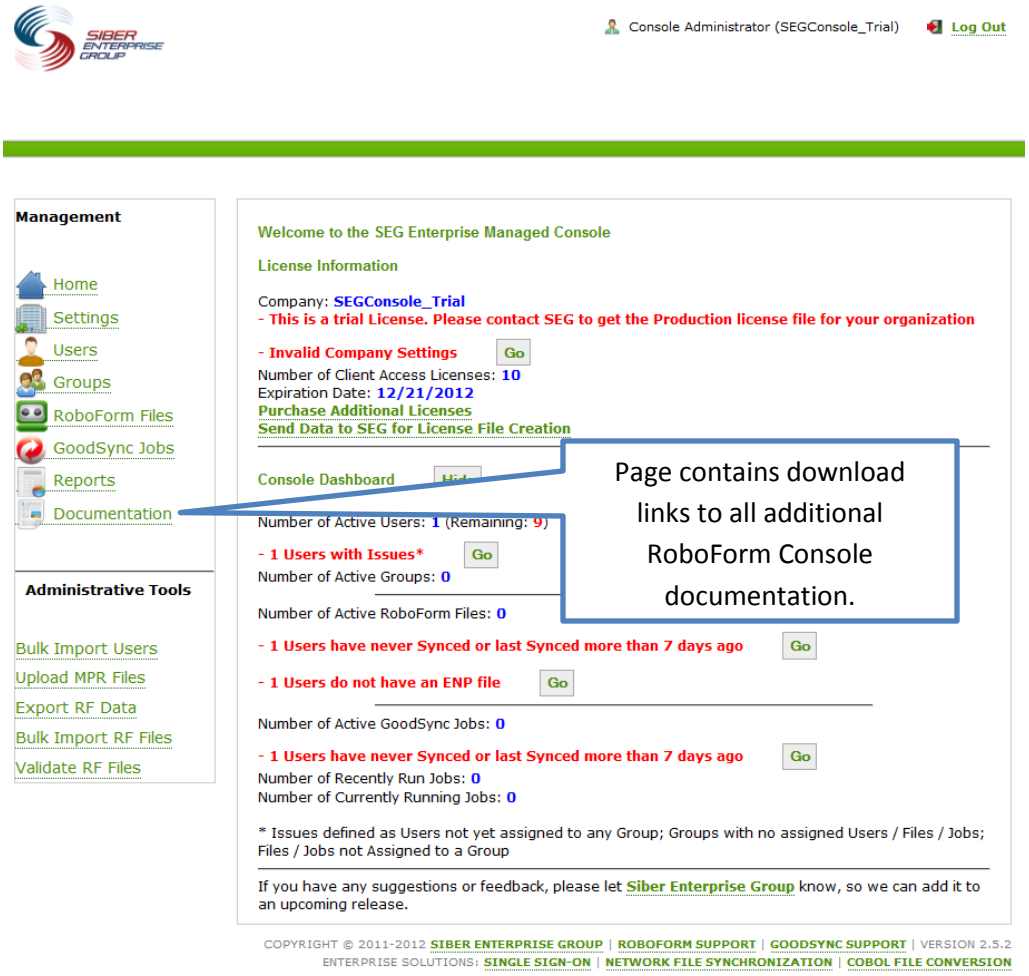
Creating Users

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:



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



For Additional Information…

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